




















# America Claims an Empire

OVERVIEW	INSTRUCTIONAL RESOURCES	
<p><b>ESSENTIAL QUESTION</b></p> <p>Which individuals and events moved the United States into the role of a world power?</p> <p> <b>Focus on the Essential Question Podcast</b></p>	<p> <b>Telescoping the Times</b></p> <ul style="list-style-type: none"> <li>• Chapter Summary, pp. 19–20</li> </ul> <p> <b>Planning for Block Schedules</b></p>	<p> <b>Interactive Online Edition</b></p> <p> <b>ExamView® Assessment Suite</b> (English/Spanish)</p> <p> <b>mySmartPlanner</b></p> <p> <b>Power Presentations</b></p> <p> <b>Video:</b> TR and the Spanish-American War</p> <p> <b>hmhsocialstudies.com</b></p>
<p><b>SECTION 1</b></p> <p><b>Imperialism and America</b></p> <p><b>MAIN IDEA</b> Beginning in 1867 and continuing through the century, global competition caused the United States to expand.</p>	<p> <b>In-Depth Resources:</b> Unit 3</p> <ul style="list-style-type: none"> <li>• Guided Reading, p. 24</li> <li>• Building Vocabulary, p. 28</li> <li>• Reteaching Activity, p. 30</li> <li>• Literature, pp. 42–44</li> </ul> <p> <b>Lesson Plans</b>, pp. 81–82</p> <p> <b>Guided Reading Workbook</b>, Section 1</p>	<p> <b>Critical Thinking Transparencies</b></p> <ul style="list-style-type: none"> <li>• CT18 U.S. Policies for Overseas Expansion</li> </ul>
<p><b>SECTION 2</b></p> <p><b>The Spanish-American War</b></p> <p><b>MAIN IDEA</b> In 1898, the United States went to war to help Cuba win its independence from Spain.</p>	<p> <b>In-Depth Resources:</b> Unit 3</p> <ul style="list-style-type: none"> <li>• Guided Reading, p. 25</li> <li>• Reteaching Activity, p. 31</li> <li>• Primary Sources, pp. 38–40</li> <li>• American Lives, pp. 45–46</li> </ul> <p> <b>Lesson Plans</b>, pp. 83–84</p> <p> <b>Guided Reading Workbook</b>, Section 2</p>	<p> <b>Humanities Transparencies</b></p> <ul style="list-style-type: none"> <li>• HT37 Declined with Thanks</li> </ul> <p> <b>Video:</b> China: Boxer Uprising</p>
<p><b>SECTION 3</b></p> <p><b>Acquiring New Lands</b></p> <p><b>MAIN IDEA</b> In the early 1900s, the United States engaged in conflicts in Puerto Rico, Cuba, and the Philippines.</p>	<p> <b>In-Depth Resources:</b> Unit 3</p> <ul style="list-style-type: none"> <li>• Guided Reading, p. 26</li> <li>• Reteaching Activity, p. 32</li> </ul> <p> <b>Lesson Plans</b>, pp. 85–86</p> <p> <b>Guided Reading Workbook</b>, Section 3</p>	<p> <b>Geography Transparencies</b></p> <ul style="list-style-type: none"> <li>• GT18 United States Intervenes in Latin America, 1890–1920</li> </ul> <p> <b>Critical Thinking Transparencies</b></p> <ul style="list-style-type: none"> <li>• CT52 U.S. Trade with Central America, 1913–1920</li> </ul> <p> <b>Video:</b> Panama Canal: Locks</p> <p> <b>Video:</b> The Peasant Revolution</p>
<p><b>SECTION 4</b></p> <p><b>America as a World Power</b></p> <p><b>MAIN IDEA</b> The Russo-Japanese War, the Panama Canal, and the Mexican Revolution added to America’s military and economic power.</p>	<p> <b>In-Depth Resources:</b> Unit 3</p> <ul style="list-style-type: none"> <li>• Guided Reading, p. 27</li> <li>• Reteaching Activity, p. 33</li> <li>• Geography Application, pp. 34–35</li> <li>• Outline Map, pp. 36–37</li> <li>• Primary Sources, p. 41</li> </ul> <p> <b>Lesson Plans</b>, pp. 87–88</p> <p> <b>Guided Reading Workbook</b>, Section 4</p>	<p> <b>Geography Transparencies</b></p> <ul style="list-style-type: none"> <li>• GT18 United States Intervenes in Latin America, 1890–1920</li> </ul> <p> <b>Critical Thinking Transparencies</b></p> <ul style="list-style-type: none"> <li>• CT52 U.S. Trade with Central America, 1913–1920</li> </ul> <p> <b>Video:</b> Panama Canal: Locks</p> <p> <b>Video:</b> The Peasant Revolution</p>

## ASSESSMENT

**SE** Chapter Assessment, pp. 368–369

 **Formal Assessment**  
• Chapter Tests, Forms A, B, and C, pp. 197–208

 **ExamView® Assessment Suite** (English/Spanish)


 **Integrated Assessment**

 **Strategies for Test Preparation**

 [hmhsocialstudies.com](http://hmhsocialstudies.com) **TEST PRACTICE**

**SE** Section 1 Assessment, p. 345


**TE** Self-Assessment, p. 345

 **Formal Assessment**  
• Section Quiz, p. 193

 **Test Practice Transparencies**, TT67

**SE** Section 2 Assessment, p. 351


**TE** Self-Assessment, p. 351

 **Formal Assessment**  
• Section Quiz, p. 194

 **Test Practice Transparencies**, TT68

**SE** Section 3 Assessment, p. 358


**TE** Self-Assessment, p. 358

 **Formal Assessment**  
• Section Quiz, p. 195

 **Test Practice Transparencies**, TT69

**SE** Section 4 Assessment, p. 365

**TE** Self-Assessment, p. 365

 **Formal Assessment**  
• Section Quiz, p. 196

 **Test Practice Transparencies**, TT70

## Chart Key:

**SE** Student Edition

 Block Scheduling

 MP3 Audio

**TE** Teacher's Edition

 Online-only Resource

 HISTORY®

 Printable Resource

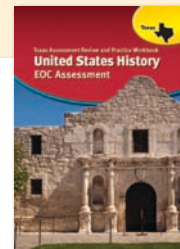
 Presentation Resource

All Program Resources available @  [hmhsocialstudies.com](http://hmhsocialstudies.com)

## Supporting Resources

### Texas Assessment Review and Practice

- End-of-Course Assessment tips and sample tests to prepare students
- Teacher materials with instructional guidelines, digital flash cards, and ExamView® test banks




### Social Studies Trade Library Collections

- U.S. History Civil War to Present Trade Collection

### Fast Track to a 5


- AP test preparation for U.S. History provides students with test-taking strategies, review, and practice exams.





For more information or to purchase these resources, go to  [hmhsocialstudies.com](http://hmhsocialstudies.com)


## Differentiated Instruction

### ENGLISH LEARNERS


 **Spanish/English Guided Reading Workbook**  
Sections 1–4


 **Access for Students Acquiring English/ESL:**  
Spanish Translations,  
pp. 123–131


 **Modified Lesson Plans for English Learners**

 **Chapter Summaries**  
(English/Spanish)


### STRUGGLING READERS

 **Guided Reading Workbook**  
Sections 1–4

 **Telescoping the Times**  
• Chapter Summary,  
pp. 19–20

 **Chapter Summaries**  
(English/Spanish)

### GIFTED AND TALENTED STUDENTS

 **In-Depth Resources: Unit 5**  
• Primary Sources,  
pp. 38–41  
• Literature, pp. 42–44  
• American Lives, pp. 45–46

## Enrichment Activities

**SE** Student Edition, pp. 340–367

- Interact with History, pp. 340–341
- Science & Technology, p. 361
- Geography Spotlight, pp. 366–367

# CHAPTER 10: PACING GUIDE

## BLOCK SCHEDULE LESSON PLAN OPTIONS (90-MINUTE PERIOD)

### DAY 1

#### CHAPTER 10 OPENER pp. 340–341

##### History from Visuals, p. 340

**Class Time** 15 minutes

*Options for Pacing and Variety*

- **Time Saver** Have students look at the painting on the spread and ask them the Interpreting the Painting questions in the TE. Also have them study the time line and ask them the questions that correspond in the TE.  
**Class Time** 10 minutes

##### Interact With History, p. 341

**Class Time** 20 minutes

*Options for Pacing and Variety*

- **Role-Playing** Have students read the paragraph and discuss the Examine the Issues questions. For more questions to keep the discussion going, use the Examine the Issues on TE page 341.  
**Class Time** 15 minutes

#### SECTION 1 pp. 342–345

**Class Time** 30 minutes

*Options for Pacing and Variety*

- **Role-Playing** Assign the following roles to small groups of students: American planters, native Hawaiians, contract laborers, Queen Liliuokalani, U.S. ambassador John L. Stevens, President Cleveland, and President McKinley. Use a loose debate structure and ask a general question on whether the annexation of Hawaii is good for the United States, Hawaii, or both.  
**Class Time** 25 minutes

### DAY 1 continued

- **Peer Teaching** Have students work in pairs to complete the Section 1 Assessment. Discuss the answers as a class.  
**Class Time** 15 minutes

#### SECTION 2 pp. 346–351

**Class Time** 30 minutes

*Options for Pacing and Variety*

- **Internet** Read for the class the “Tracing Themes: Yellow Journalism” information panel in the TE. Have students search the Internet for more about the tactics of yellow journalism. They might start by searching the examples given in the text—William Randolph Hearst or Joseph Pulitzer—together with the term “yellow journalism.” Have them look for other examples, which could be modern examples or examples related to Cuba, and try to trace some effects of exaggeration by the media.  
**Class Time** 30 minutes
- **Time Saver** Ask students to study the maps on page 349 and answer the Geography Skillbuilder questions. Have students discuss the possible effects of a naval blockade on a blockaded country.  
**Class Time** 10 minutes

### DAY 2

#### SECTION 3 pp. 352–358

**Class Time** 30 minutes

*Options for Pacing and Variety*

- **Time Saver** As the class discusses the section, ask students the Instruct questions on TE pages 352, 355, 356, and 358 to help them understand the main points of the section.  
**Class Time** 15 minutes
- **Peer Teaching** Have students work in pairs to complete questions 2, 3, and 4 of the Section 3 Assessment. Discuss the answers as a class.  
**Class Time** 15 minutes
- **Internet** Have students work in pairs. Ask them to read “A Personal Voice: Mark Twain” on page 358 and contrast the main motives for U.S. imperialism with other views of those motives. Have them search the Internet, beginning with Mark Twain, for objections to imperialism at the time. Have students summarize the arguments they find and make a chart for the contrasting opinions of what ideas fuel imperialism.  
**Class Time** 40 minutes

#### SECTION 4 pp. 359–369

**Class Time** 30 minutes

*Options for Pacing and Variety*

- **Team Teaching** Have students look at the painting Orozco’s *Zapatistas* on page 364. Read the information on the painting in the TE. If there is an art teacher in the school who knows about the Mexican Renaissance, ask him or her to talk

### DAY 2 continued

to the class about the artistic movement and its close ties with revolutionary ideas. Find more examples of paintings from that movement on the Internet.  
**Class Time** 30 minutes

- **Peer Teaching** Have students work in pairs to complete the Section 4 Assessment. Have them add to their answers as they discuss them with another group.  
**Class Time** 20 minutes
- **History on Film** Have students read the Geography Spotlight on “The Panama Canal” on pages 366–367. View part or all of the video *Panama Canal* listed in resources on TE page 366.  
**Class Time** 40 minutes

#### ASSESSMENT pp. 368–369

**Class Time** 30 minutes

*Options for Pacing and Variety*

- **Peer Teaching** Have students work in small groups to complete the Critical Thinking questions. Discuss the answers as class.  
**Class Time** 20 minutes
- **Peer Evaluation** Have students work in pairs and quiz each other on the terms and names and Main Ideas questions. They should look in the book to correct each other.  
**Class Time** 15 minutes

### TEACHER-TESTED ACTIVITY

**Brenda G. Smith, Instructional Supervisor, Social Studies, District 11, Colorado Springs, Colorado**

#### COMPUTER SLIDE SHOW: BUILDING THE PANAMA CANAL

**Class Time** 90 minutes

**Task** Creating a computer slideshow

**Purpose** To learn about a specific aspect of the building of the Panama Canal

**Supplies Needed**

- Textbook
- Internet access

**Activity** Have students work in pairs. Tell them to choose a specific aspect—such as engineering or politics—of the building of the Panama Canal. Have them download images from the National Archives Web site to create a computer slideshow. Each image should have an explanatory caption. Then give students time to view the work of their classmates.

**MULTIMEDIA PRESENTATION**

The Internet provides access to a wealth of political cartoons that show various perspectives at key moments in American history. By examining and comparing the perspectives in these primary sources, students gain practice in analyzing political cartoons. Using a multimedia presentation program to present their findings also helps students learn to organize information in a non-linear manner.

**ACTIVITY OUTLINE**

**Objective** Students will examine and discuss a selection of political cartoons published at the time of the Spanish-American War. This project will give them practice not only in designing a multimedia presentation but also in analyzing political cartoons, a skill tested on some standardized assessments.

**Task** Have students view the political cartoons at the Web sites recommended at [hmhsocialstudies.com](http://hmhsocialstudies.com). They will consider the messages in the cartoons; assess the role of “yellow journalism” during the Spanish-American War; and, in a more general sense, discuss the role of the press in shaping public opinion. Then they will choose several cartoons and create a multimedia presentation analyzing the cartoons and their relationship to public perceptions of the Spanish-American War.

**Class Time** 45 minutes

**DIRECTIONS**

1. Have students begin by reading some brief discussions of yellow journalism before and during the Spanish-American War.
2. Then have them examine a selection of cartoons published at the time of the war with Spain and summarize in a paragraph what the press wanted Americans to feel about the conflict.
3. Discuss with the class how the Spanish are portrayed in the cartoons. Can students name two later conflicts in which the press portrayed the enemy or the enemy’s leaders in a similar way?
4. Have students choose three cartoons that they feel illustrate especially well the role of the press in the Spanish-American War. Instruct students to download the images and import them into a multimedia presentation program—be sure to observe all copyright restrictions. They should make one slide for each cartoon.
5. Then have students make an introductory slide that presents the title of their presentation, as well as the paragraph they wrote earlier about the press’s attempts to influence Americans’ feelings about the war. Have them create hyperlinks from this first slide to each of the three cartoons.
6. For each cartoon, students should write a caption that provides an analysis of the cartoon and the viewpoint it is showing (or promoting). Remind them to point to specific details in each cartoon to support their analyses.
7. Allow time for students to view each other’s presentations.
8. **Optional Activity** Conduct a class discussion on the power and responsibilities of the press. Consider this question: Should newspapers be advocates or merely reporters?

Introduce the **Essential Question**

- Consider why a country might want to acquire an overseas colonial empire.
- Explain how the United States acquired overseas territories in the late 19th and early 20th centuries.
- Discuss the impact that American intervention in the Mexican Revolution had on U.S.-Mexican relations.



# AMERICA CLAIMS AN EMPIRE

**Essential Question** *myNotebook*

Which individuals and events moved the United States into the role of a world power?



**Texas Essential Knowledge and Skills (TEKS)**

2D, 4A, 4B, 12A, 15C, 15D, 29A, 29D

**SECTION 1: Imperialism and America**

**Main Idea** Beginning in 1867 and continuing through the century, global competition caused the United States to expand.

**SECTION 2: The Spanish-American War**

**Main Idea** In 1898, the United States went to war to help Cuba win its independence from Spain.

**SECTION 3: Acquiring New Lands**

**Main Idea** In the early 1900s, the United States engaged in conflicts in Puerto Rico, Cuba, and the Philippines.

**SECTION 4: America as a World Power**

**Main Idea** The Russo-Japanese War, the Panama Canal, and the Mexican Revolution added to America's military and economic power.

## HISTORY from VISUALS

### Interpreting the Painting

Ask students to examine the painting and suggest words they would use to describe the scene. Ask them how the painting depicts Theodore Roosevelt, one of the leaders of the Rough Riders at the Battle of San Juan Hill. How does such a depiction differ from the way in which most soldiers probably act during battle? (*Scene—chaotic, frightening, exciting; Roosevelt—heroic, fearless, and calm under fire; soldiers—frightened and anxious*)

**Extension** Ask students to write the lead paragraph of a news story about the charge up San Juan Hill based on this painting.

### Time Line Discussion

Explain to students that the time line covers key U.S. and world events just before and after the turn of the 20th century.

- Ask students what year the Spanish-American war began. (1898)
- Ask students who became president of the United States in 1901, and what was unique about the way in which he attained the presidency. (*Theodore Roosevelt; he became president after William McKinley was assassinated*)
- Ask students how long after Panama declared its independence from Colombia the United States opened the Panama Canal. (11 years)



This lithograph of Roosevelt leading the Rough Riders at San Juan Hill shows the men on horseback, although they actually fought on foot.



**1893** Business groups, aided by U.S. marines, overthrow Hawaii's Queen Liliuokalani.

**1898** U.S.S. *Maine* explodes and sinks. The Spanish-American War begins.

**1901** Theodore Roosevelt becomes president after McKinley is assassinated.

USA  
WORLD

1890

1900

**1895** Guglielmo Marconi develops the technology that led to the modern radio.

**1898** Marie Curie discovers radium.



**1900** In China, the Boxers rebel.

**1903** Panama declares its independence from Colombia.

## THEMES IN CHAPTER 10

### SCIENCE AND TECHNOLOGY

Technological advances fueled U.S. imperialism at the turn of the 20th century. Improved equipment increased farm and factory output. Increased output led to a surplus of goods and prompted the need for overseas markets.

See Teacher's Edition note, p. 343.

### AMERICA IN WORLD AFFAIRS

The late 1800s are often referred to as the "Age of Imperialism." During this time, several European nations took control of much of Africa and parts of Asia and the Pacific. The United States joined in the pursuit of colonies.

See Teacher's Edition note, p. 350.

### CIVIL RIGHTS

As the United States acquired new territory, questions were raised about the civil rights of the people in these newly acquired lands.

See Teacher's Edition note, p. 353.

### DIVERSITY AND NATIONAL IDENTITY

African Americans serving in the military in the Philippines struggled with questions of national identity and the task of putting down an independence movement.

See Teacher's Edition note, p. 355.



# HISTORY



TR and the Spanish-American War

[hmhsocialstudies.com](http://hmhsocialstudies.com) VIDEO

myNotebook

## INTERACT WITH HISTORY

### Objectives

- To help students understand the media's potential to sway public opinion and even to dictate events
- To help students recognize some of the main reasons why the United States declared war on Spain

### Explore the Issues

1. Have students consider what circumstances might prompt the United States to fight on behalf of a neighboring country.
2. Ask students to discuss the importance of a free press in a democratic society, as well as whether or not the media have any duties or responsibilities in such a society.

myNotebook

## INTERACT WITH HISTORY

In the late 1890s, American newspapers are running sensational stories about Spain's harsh rule of Cuba. Such articles anger Americans. Among those willing to fight for Cuba's freedom are a group of volunteers, the Rough Riders. Led by future president Theodore Roosevelt, the Rough Riders become a model for others to follow. As you read the chapter and explore the issues below, use the annotation tools in your eBook to record your thoughts.

### Explore the Issues

- When should the U.S. intervene in the affairs of another country?
- In what ways do dramatic headlines influence American opinion?

**TEKS 2D** explain the significance of the following years as turning points: 1898 (Spanish-American War), 1914-1918 (World War I), 1929 (the Great Depression begins), 1939-1945 (World War II), 1957 (Sputnik launch ignites U.S.-Soviet space race), 1968-1969 (Martin Luther King Jr. assassination and U.S. lands on the moon), 1991 (Cold War ends), 2001 (terrorist attacks on World Trade Center and the Pentagon), and 2008 (election of first black president, Barack Obama) **4A** explain why significant events, policies, and individuals such as the Spanish-American War, U.S. expansionism, Henry Cabot Lodge, Alfred Thayer Mahan, Theodore Roosevelt, Sanford B. Dole, and missionaries moved the United States into the position of a world power **4B** evaluate American expansionism, including acquisitions such as Guam, Hawaii, the Philippines, and Puerto Rico **12A** analyze the impact of physical and human geographic factors on the settlement of the Great Plains, the Klondike Gold Rush, the Panama Canal, the Dust Bowl, and the levee failure in New Orleans after Hurricane Katrina **15C** explain how foreign policies affected economic issues such as the Chinese Exclusion Act of 1882, the Open Door Policy, Dollar Diplomacy, and immigration quotas **15D** describe the economic effects of international military conflicts, including the Spanish-American War and World War I, on the United States **29A** Use a variety of primary and secondary valid sources to acquire information and to analyze and answer historical questions **29D** Use the process of historical inquiry to interpret, and use multiple sources of evidence

**1908** William Howard Taft is elected president.

**1912** Woodrow Wilson is elected president.



**1914** The Panama Canal opens.

**1917** Puerto Ricans become U.S. citizens.

**1917** The United States enters World War I.

1910

1920

**1910** The Mexican Revolution begins.

**1914** World War I begins in Europe.



**1917** Mexico revises and adopts its constitution.

*America Claims an Empire* 341

### RECOMMENDED RESOURCES

#### BOOKS FOR THE TEACHER

Marks, George P., ed. *The Black Press Views American Imperialism*. New York: Arno Press, 1971. Unusual perspective on imperialism.

Musicant, Ivan. *Empire by Default: The Spanish-American War & the Dawn of the American Century*. New York: Henry Holt & Company, Inc., 2008. Comprehensive telling of the war.

#### BOOKS FOR THE STUDENT

McCullough, David G. *The Path Between the Seas: The Creation of the Panama Canal, 1870-1914*. New York: Simon and Schuster, 1977.

Rydell, Robert W. *All the World's a Fair: Visions of Empire at American International Expositions: 1876-1916*. Chicago: U of Chicago Press, 1984.

#### VIDEOS

*The Big Stick*. 1991. RMI Media, 800-745-5480. U.S. foreign policy in Latin America.

*The Hunt for Pancho Villa*. PBS Home Video, 1993. 800-424-7963.

*The 1890s*. 1994. Video Knowledge, 516-367-4250. U.S. Imperialism.

#### SOFTWARE

*American History: Becoming a World Power*. Word Associates, 3226 Robincrest Drive, Northbrook, IL 60062.

#### INTEGRATED TECHNOLOGY

For teacher support, visit . . .

[hmhsocialstudies.com](http://hmhsocialstudies.com)

## OBJECTIVES

- 1 Explain the economic and cultural factors that fueled the growth of American imperialism.
- 2 Describe how the United States acquired Alaska. Summarize how the United States took over the Hawaiian Islands.

**TEKS 4A** explain why significant events, policies, and individuals such as the Spanish-American War, U.S. expansionism, Henry Cabot Lodge, Alfred Thayer Mahan, Theodore Roosevelt, Sanford B. Dole, and missionaries moved the United States into the position of a world power **4B** evaluate American expansionism, including acquisitions such as Guam, Hawaii, the Philippines, and Puerto Rico


## Focus & Motivate


How might a person behave when he or she feels superior to others? Ask students how countries might act in a similar fashion.

## Instruct


### Instruct: Objective 1 American Expansionism


- What is the policy of imperialism?
- What were the major factors that contributed to the growth of American imperialism?


 In-Depth Resources: Unit 3  
• Guided Reading, p. 24  
• Literature: from *Hawaii*, pp. 42–44


 Critical Thinking Transparencies CT18  
• U.S. Policies for Overseas Expansion


## PROGRAM RESOURCES

 In-Depth Resources: Unit 3  
• Guided Reading, p. 24  
• Building Vocabulary, p. 28  
• Reteaching Activity, p. 30  
• Literature: from *Hawaii*, pp. 42–44


 Guided Reading Workbook  
• Section 1


 Spanish/English Guided Reading Workbook  
• Section 1

 Access for Students Acquiring English/ESL  
• Guided Reading (Spanish), p. 124




 Formal Assessment  
• Section Quiz, p. 193

## INTEGRATED TECHNOLOGY

 Critical Thinking Transp. CT18  
• U.S. Policies for Overseas Expansion

 [hmsocialstudies.com](http://hmsocialstudies.com)

## TEST-TAKING RESOURCES

-  Strategies for Test Preparation
-  Test Practice Transparencies TT67
-  Online Test Practice



# Imperialism and America

### MAIN IDEA

Beginning in 1867 and continuing through the century, global competition caused the United States to expand.

### WHY IT MATTERS NOW

During this time period, the United States acquired Hawaii and Alaska, both of which became states in 1959.

### Terms & Names

- Queen Liliuokalani
- Pearl Harbor
- imperialism
- Alfred T. Mahan
- William Seward
- Pearl Harbor
- Sanford B. Dole

## One American's Story



Use the graphic organizer online to take notes on events and concepts that illustrate the roots of imperialism.

In 1893 **Queen Liliuokalani** (lə-lee'-ə-ō-kə-lā'nē) realized that her reign in Hawaii had come to an end. More than 160 U.S. sailors and marines stood ready to aid the *haoles* (white foreigners) who planned to overthrow the Hawaiian monarchy. In an eloquent statement of protest, the proud monarch surrendered to the superior force of the United States.

### A PERSONAL VOICE QUEEN LILIUOKALANI

"I, Liliuokalani, . . . do hereby solemnly protest against any and all acts done against myself and the constitutional government of the Hawaiian Kingdom. . . . Now, to avoid any collision of armed forces and perhaps the loss of life, I do under this protest . . . yield my authority until such time as the Government of the United States shall . . . undo the action of its representatives and reinstate me in the authority which I claim as the constitutional sovereign of the Hawaiian Islands."

—quoted in *Those Kings and Queens of Old Hawaii*

U.S. ambassador to Hawaii John L. Stevens informed the State Department, "The Hawaiian pear is now fully ripe, and this is the golden hour for the United States to pluck it." The annexation of Hawaii was only one of the goals of America's empire builders in the late 19th century.



▲ Hawaii's "Queen Lili" announced that if restored to power, she would behead those who had conspired to depose her.

## 1 American Expansionism

Americans had always sought to expand the size of their nation, and throughout the 19th century they extended their control toward the Pacific Ocean. However, by the 1880s, many American leaders had become convinced that the United States should join the imperialist powers of Europe and establish colonies overseas. **Imperialism**—the policy in which stronger nations extend their economic, political, or military control over weaker territories—was already a trend around the world.

**MAIN IDEA**

**Analyzing Effects**

**A** How did European imperialism affect Africa?

**A. Answer**  
Only two African nations remained independent; the rest of the continent was divided up among European nations.

**Background**

In the late 1800s, new farm machinery greatly improved grain production. For example, plows, harrows, threshing machines, and reapers increased corn production by 264 percent and the wheat harvest by 252 percent.

**GLOBAL COMPETITION** European nations had been establishing colonies for centuries. In the late 19th century Africa had emerged as a prime target of European expansionism. By the early 20th century, only two countries in all of Africa—Ethiopia and Liberia—remained independent. **A**

Imperialists also competed for territory in Asia, especially in China. In its late-19th-century reform era, Japan replaced its old feudal order with a strong central government. Hoping that military strength would bolster industrialization, Japan joined European nations in competition for China in the 1890s.

Most Americans gradually warmed to the idea of expansion overseas. With a belief in manifest destiny, they already had pushed the U.S. border to the Pacific Ocean. Three factors fueled the new American imperialism:

- desire for military strength
- thirst for new markets
- belief in cultural superiority

**DESIRE FOR MILITARY STRENGTH** Seeing that other nations were establishing a global military presence, American leaders advised that the United States build up its own military strength. One such leader was Admiral **Alfred T. Mahan** of the U.S. Navy. Mahan urged government officials to build up American naval power in order to compete with other powerful nations. As a result of the urging of Mahan and others, the United States built nine steel-hulled cruisers between 1883 and 1890. The construction of modern battleships such as the *Maine* and the *Oregon* transformed the country into the world's third largest naval power.

**THIRST FOR NEW MARKETS** In the late 19th century, advances in technology enabled American farms and factories to produce far more than American citizens could consume. Now the United States needed raw materials for its factories and new markets for its agricultural and manufactured goods. Imperialists viewed foreign trade as the solution to American overproduction and the related problems of unemployment and economic depression.

In the early 1900s, the Navy's Great White Fleet, so named because its ships were painted white, was a sign of America's growing military power. ▶



**KEY PLAYER**



**ADMIRAL ALFRED T. MAHAN**  
1840–1914

Alfred T. Mahan joined the U.S. Navy in the late 1850s and served for nearly forty years. In 1886, he became president of the newly established Naval War College in Newport, Rhode Island.

Throughout his lifetime, Mahan was one of the most outspoken advocates of American military expansion. In his book *The Influence of Sea Power upon History, 1660–1783* (published in 1890), Mahan called for the United States to develop a modern fleet capable of protecting American business and shipping interests around the world. He also urged the United States to establish naval bases in the Caribbean, to construct a canal across the Isthmus of Panama, and to acquire Hawaii and other Pacific islands.

**KEY PLAYER**

**Admiral Alfred T. Mahan**

One of the early admirers of Mahan's work was Theodore Roosevelt, then the U.S. civil service commissioner. "I can say with perfect sincerity that I think it very much the clearest and most instructive general work of the kind with which I am acquainted," Roosevelt wrote Mahan after reading *The Influence of Sea Power upon History* in the summer of 1890. "It is a very good book—admirable; and I am greatly in error if it does not become a naval classic." Discuss with students what Roosevelt's comments might suggest about the actions he would take as president.

**Tracing Themes**

**SCIENCE AND TECHNOLOGY**

**Advances in Food Production**

From 1870 to 1900, new and improved farm machinery greatly increased grain production in the United States. For example, plows, harrows, grain drills, reapers, and threshing machines boosted the nation's corn harvest by 147 percent and the wheat harvest by 134 percent. Faced with such a surplus of farm products, the United States increased its foreign trade as it sought new markets for these goods.

**DIFFERENTIATING INSTRUCTION LESS PROFICIENT READERS**

**Understanding Main Causes** **ELPS** 1D, 1F, 4D

Help students understand why the United States embraced imperialism.

- List the three major factors on the board, as shown at right.
- Ask students to tell what each factor means in their own words.
- Then have students find an example of each cause on text pages 343 and 344.

Have students copy the list and examples to use during class discussion of the section.

Factor	Meaning	Example
1. Desire for Military Strength		
2. Thirst for new markets		
3. Belief in Cultural Superiority		



**Instruct: Objective 2**

**The United States Acquires Alaska / The United States Takes Hawaii**

- Why was the purchase of Alaska significant?
- What groups were interested in increasing America's presence in Hawaii? Why?
- How did Hawaii eventually come under the control of the United States?

**In-Depth Resources: Unit 3**  
 • Guided Reading, p. 24  
 • Literature: from *Hawaii*, pp. 42–44

**Skillbuilder Answers**  
 1. The percentage of native Hawaiians declined from about 98% in 1853 to about 16% in 1920. The percentage of other populations (mostly Asian) increased from about 1% in 1853 to about 62% in 1920.  
 2. These changes may have led to tensions between native Hawaiians and newcomers.

**BELIEF IN CULTURAL SUPERIORITY** Cultural factors also were used to justify imperialism. Some Americans combined the philosophy of Social Darwinism—a belief that free-market competition would lead to the survival of the fittest—with a belief in the racial superiority of Anglo-Saxons. Some people therefore considered it a social responsibility to “civilize” the inhabitants of less developed countries and spread the benefits of Western society. In addition, Protestant Christian missionaries felt they had a moral duty to convert others to their beliefs.

**The United States Acquires Alaska 2**

An early supporter of American expansion was **William Seward**, Secretary of State under presidents Abraham Lincoln and Andrew Johnson. In 1867, Seward arranged for the U.S. to buy Alaska from the Russians for \$7.2 million. Seward had some trouble persuading the House of Representatives to approve funding for the purchase. Some people thought it was silly to buy what they called “Seward’s Icebox” or “Seward’s folly.” Time showed how wrong they were. In 1959, Alaska became a state. For about two cents an acre, the United States had acquired a land rich in timber, minerals, and, as it turned out, oil. **B**

**The United States Takes Hawaii 2**

In 1867, the same year in which Alaska was purchased, the United States took over the Midway Islands, which lie in the Pacific Ocean about 1300 miles north of Hawaii. No one lived on the islands, so the event did not attract much attention.

Hawaii was another question. The Hawaiian Islands had been economically important to the United States for nearly a century. Since the 1790s, American merchants had stopped there on their way to China and East India. In the 1820s, Yankee missionaries founded Christian schools and churches on the islands. Their children and grandchildren became sugar planters who sold most of their crop to the United States.

**THE CRY FOR ANNEXATION** In the mid-19th century, American-owned sugar plantations accounted for about three-quarters of the islands’ wealth. Plantation owners imported thousands of laborers from Japan, Portugal, and China. By 1900, foreigners and immigrant laborers outnumbered native Hawaiians about three to one.

White planters profited from close ties with the United States. In 1875, the United States agreed to import Hawaiian sugar duty-free. Over the next 15 years, Hawaiian sugar production increased nine times. Then the McKinley Tariff of 1890 provoked a crisis by eliminating the duty-free status of Hawaiian sugar. As a result, Hawaiian sugar growers faced competition in the American market. American planters in Hawaii called for the United States to annex the islands so they wouldn’t have to pay the duty.

U.S. military and economic leaders already understood the value of the islands. In 1887, they pressured Hawaii to allow the United States to build a naval base at **Pearl Harbor**, the kingdom’s best port. The base became a refueling station for American ships.

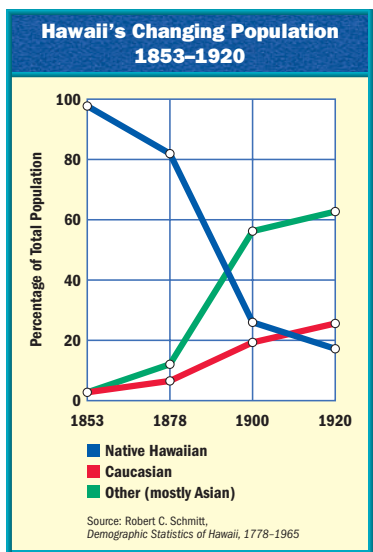
**MAIN IDEA**  
**Developing Historical Perspective**  
**B** How did time prove that the purchase of Alaska was not an act of folly?  
**B. Answer**  
 Alaska is rich in timber, minerals, and oil.

**HISTORY from VISUALS**

**Interpreting the Graph**

Tell students to note that the graph depicts shifts in the percentage of different ethnic groups that were part of Hawaii’s total population and does not address numbers of persons.

**Extension** Discuss with students what the changes in Hawaii’s ethnic population shown on the graph say about the effects of imperialism on smaller, less powerful countries.



**SKILLBUILDER Interpreting Graphs**

1. What were the most dramatic changes in Hawaiian population between 1853 and 1920?
2. How might these changes have affected the political climate there?

**Vocabulary**  
**annex:** to incorporate territory into an existing country or state

**ACTIVITY COOPERATIVE LEARNING**

**BLOCK SCHEDULING**

**Considering the Annexation of Hawaii ELPs 3E, 3G**

**Class Time** 45 minutes

**Task** Writing position papers that represent different interests in Hawaii

**Purpose** To help students recognize different viewpoints regarding the annexation of Hawaii

**Directions** Assign the following roles to small groups of students: American planters, native Hawaiians, contract laborers, Queen Liliuokalani, U.S. Ambassador John L. Stevens, President Cleveland, and President McKinley. Have each group write a viewpoint regarding the annexation of Hawaii. Encourage students to use quotes from the text and other sources. Proficient ELLs should participate and extend the discussion through clear sentence structure and appropriate academic vocabulary.

**Integrated Assessment**  
 • Rubric 5

**Skillbuilder Answer**

- 2,400 miles west of United States
- Hawaii: re-fueling stations; Alaska: protected U.S. from Russian aggression

**C. Answer**  
U.S. minister John L. Stevens organized a revolution that dethroned Hawaii's queen in 1891. American plantation owner Sanford B. Dole became head of the new government. In 1897 William McKinley became president. He favored annexation.

**MAIN IDEA**

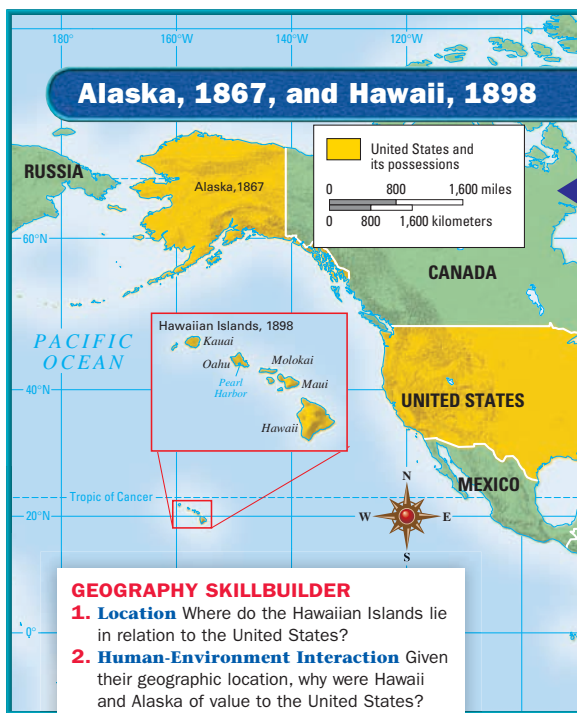
**Analyzing Events**

**C** What factors led to the annexation of Hawaii in 1898?

**THE END OF A MONARCHY** Also in that year, Hawaii's King Kalakaua had been strong-armed by white business leaders. They forced him to amend Hawaii's constitution, effectively limiting voting rights to only wealthy land-owners. But when Kalakaua died in 1891, his sister Queen Liliuokalani came to power with a "Hawaii for Hawaiians" agenda. She proposed removing the property-owning qualifications for voting. To prevent this from happening, business groups—encouraged by Ambassador John L. Stevens—organized a revolution. With the help of marines, they overthrew the queen and set up a government headed by **Sanford B. Dole**.

President Cleveland directed that the queen be restored to her throne. When Dole refused to surrender power, Cleveland formally recognized the Republic of Hawaii. But he refused to consider annexation unless a majority of Hawaiians favored it.

In 1897, William McKinley, who favored annexation, succeeded Cleveland as president. On August 12, 1898, Congress proclaimed Hawaii an American territory, although Hawaiians had never had the chance to vote. In 1959, Hawaii became the 50th state of the United States. **C**



**HISTORY from VISUALS**

**Interpreting the Map**

Remind students that the inset showing Hawaii is not drawn to the scale of the large map. The small box showing Hawaii is in scale.

**Assess & Reteach**

**SECTION 1 ASSESSMENT**

Have the students work in small groups to answer the questions. Have each group share their answers to question 3 with the class.

- Formal Assessment
- Section Quiz, p. 193

**SELF-ASSESSMENT**

Ask students to write two paragraphs—one which summarizes what they knew about Hawaii before reading this section, the other summarizing what they know now.

**RETEACH**

Have students work in groups to outline the first subsection of Section 1. They should use the boldfaced headings as main ideas and fill in supporting details.

- In-Depth Resources: Unit 3
- Reteaching Activity, p. 30

**SECTION 1 ASSESSMENT**

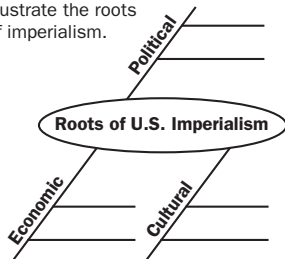
**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

- Queen Liliuokalani
- Alfred T. Mahan
- Pearl Harbor
- imperialism
- William Seward
- Sanford B. Dole

**MAIN IDEA**

**2. USING YOUR NOTES**

Copy this web on your paper and fill it in with events and concepts that illustrate the roots of imperialism.



Choose one event to explain further in a paragraph.

**CRITICAL THINKING**

**3. DRAWING CONCLUSIONS**

Manifest destiny greatly influenced American policy during the first half of the 19th century. How do you think manifest destiny set the stage for American imperialism at the end of the century?

**4. SUMMARIZING**

Explain the efforts of significant people to move the United States into the position of a world power.

- Think About:**
- Alfred T. Mahan
  - Sanford B. Dole
  - Christian missionaries

**5. ANALYZING PRIMARY SOURCES**

In the following passage, how does Indiana Senator Albert J. Beveridge explain the need for the U.S. to acquire new territories?

**“Fate has written our policy for us; the trade of the world must and shall be ours. . . . We will establish trading posts throughout the world as distributing points for American products. . . . Great colonies governing themselves, flying our flag and trading with us, will grow about our posts of trade.”**

—quoted in *Beveridge and the Progressive Era*

**Answers ASSESSMENT**

**1. TERMS & NAMES**

- Queen Liliuokalani, p. 342
- imperialism, p. 342
- Alfred T. Mahan, p. 343
- William Seward, p. 344
- Pearl Harbor, p. 344
- Sanford B. Dole, p. 345

**2. USING YOUR NOTES**

**Political**—political and military rivalry with other imperialist powers; construc-

tion of a modern naval fleet  
**Economic**—foreign trade, unemployment, and economic depression; competition among industrial nations  
**Cultural**—combining Social Darwinism with belief in Anglo-Saxon superiority; impulse to spread Christianity

**3. DRAWING CONCLUSIONS**

Students might say that manifest destiny was the guiding force behind the

annexation of western lands. These patterns of expansion set the stage for the United States to join the race for overseas expansion.

**4. SUMMARIZING**

The United States used imperialism to expand beyond North America. Alfred T. Mahan urged building up American naval power. The United States bought Alaska from the Russians. Missionaries settled

in Hawaii and their grandchildren started businesses. Later, the U.S. overthrew the Hawaiian monarchy to start a government led by Sanford B. Dole.

**5. ANALYZING PRIMARY SOURCES**

Beveridge defends the pursuit of new territories on economic grounds.

## OBJECTIVES

- 1 Contrast American opinions regarding the Cuban revolt against Spain.
- 2 Identify events that escalated the conflict between the United States and Spain.
- 3 Trace the course of the Spanish-American War and its results.

**TEKS 2D** explain the significance of the following years as turning points: 1898 (Spanish-American War), 1914-1918 (World War I), 1929 (the Great Depression begins), 1939-1945 (World War II), 1957 (Sputnik launch ignites U.S.-Soviet space race), 1968-1969 (Martin Luther King Jr. assassination and U.S. lands on the moon), 1991 (Cold War ends), 2001 (terrorist attacks on World Trade Center and the Pentagon), and 2008 (election of first black president, Barack Obama) **4A** explain why significant events, policies, and individuals such as the Spanish-American War, U.S. expansionism, Henry Cabot Lodge, Alfred Thayer Mahan, Theodore Roosevelt, Sanford B. Dole, and missionaries moved the United States into the position of a world power **15D** describe the economic effects of international military conflicts, including the Spanish-American War and World War I, on the United States


## Focus & Motivate


Ask students if they have ever been shocked or angered by something they read or heard. How did it make them want to act? Did they consider whether what they had heard was true or not?


## Instruct


### Instruct: Objective 1 Cubans Rebel Against Spain


- Why did some Americans have a strong economic interest in Cuba?
- Why did some Americans support Spanish control of Cuba, while others sympathized with the rebels?


 **In-Depth Resources: Unit 3**  
• Guided Reading, p. 25  
• American Lives: José Martí, p. 45;  
William Randolph Hearst, p. 46

 **In-Depth Resources: Unit 3**  
• Guided Reading, p. 25  
• Skillbuilder Practice: Analyzing Assumptions and Biases, p. 29  
• Reteaching Activity, p. 31  
• Primary Sources: pp. 38-40  
• American Lives: José Martí, p. 45;  
William Randolph Hearst, p. 46


 **Guided Reading Workbook**  
• Section 2

 **Spanish/English Guided Reading Workbook**  
• Section 2




 **Access for Students Acquiring English/ESL**  
• Guided Reading (Spanish), p. 125

 **Formal Assessment**  
• Section Quiz, p. 194

### INTEGRATED TECHNOLOGY

 [hmhsocialstudies.com](http://hmhsocialstudies.com)

### TEST-TAKING RESOURCES

-  Strategies for Test Preparation
-  Test Practice Transparencies TT68
-  Online Test Practice



## SECTION 2

 **TEKS 2D, 4A, 15D**

# The Spanish-American War

### MAIN IDEA

In 1898, the United States went to war to help Cuba win its independence from Spain.

### WHY IT MATTERS NOW

U.S. involvement in Latin America and Asia increased greatly as a result of the war and continues today.

### Terms & Names

- José Martí
- Valeriano Weyler
- yellow journalism
- U.S.S. Maine
- George Dewey
- Rough Riders
- San Juan Hill
- Treaty of Paris

## One American's Story

 [hmhsocialstudies.com](http://hmhsocialstudies.com)  
**TAKING NOTES**

Use the graphic organizer online to take notes on the pros and cons of annexing the Philippines.

Early in 1896, James Creelman traveled to Cuba as a *New York World* reporter, covering the second Cuban war for independence from Spain. While in Havana, he wrote columns about his observations of the war. His descriptions of Spanish atrocities aroused American sympathy for Cubans.


### A PERSONAL VOICE JAMES CREELMAN

“No man’s life, no man’s property is safe [in Cuba]. American citizens are imprisoned or slain without cause. American property is destroyed on all sides. . . . Wounded soldiers can be found begging in the streets of Havana. . . . The horrors of a barbarous struggle for the extermination of the native population are witnessed in all parts of the country. Blood on the roadsides, blood in the fields, blood on the doorsteps, blood, blood, blood! . . . Is there no nation wise enough, brave enough to aid this blood-smitten land?”

—*New York World*, May 17, 1896

Newspapers during that period often exaggerated stories like Creelman’s to boost their sales as well as to provoke American intervention in Cuba.



 Cuban rebels burn the town of Jaruco in March 1896.

## 1 Cubans Rebel Against Spain

By the end of the 19th century, Spain—once the most powerful colonial nation on earth—had lost most of its colonies. It retained only the Philippines and the island of Guam in the Pacific, a few outposts in Africa, and the Caribbean islands of Cuba and Puerto Rico in the Americas.

**AMERICAN INTEREST IN CUBA** The United States had long held an interest in Cuba, which lies only 90 miles south of Florida. In 1854, diplomats recommended to President Franklin Pierce that the United States buy Cuba from Spain. The Spanish responded by saying that they would rather see Cuba sunk in the ocean.

But American interest in Cuba continued. When the Cubans rebelled against Spain between 1868 and 1878, American sympathies went out to the Cuban people.

The Cuban revolt against Spain was not successful, but in 1886 the Cuban people did force Spain to abolish slavery. After the emancipation of Cuba's slaves, American capitalists began investing millions of dollars in large sugar cane plantations on the island.

**THE SECOND WAR FOR INDEPENDENCE** Anti-Spanish sentiment in Cuba soon erupted into a second war for independence. **José Martí**, a Cuban poet and journalist in exile in New York, launched a revolution in 1895. Martí organized Cuban resistance against Spain, using an active guerrilla campaign and deliberately destroying property, especially American-owned sugar mills and plantations. Martí counted on provoking U.S. intervention to help the rebels achieve *Cuba Libre!*—a free Cuba.

Public opinion in the United States was split. Many business people wanted the government to support Spain in order to protect their investments. Other Americans, however, were enthusiastic about the rebel cause. The cry “Cuba Libre!” was, after all, similar in sentiment to Patrick Henry’s “Give me liberty or give me death!”

## War Fever Escalates 2

In 1896, Spain responded to the Cuban revolt by sending General **Valeriano Weyler** to Cuba to restore order. Weyler tried to crush the rebellion by herding the entire rural population of central and western Cuba into barbed-wire concentration camps. Here civilians could not give aid to rebels. An estimated 300,000 Cubans filled these camps, where thousands died from hunger and disease.

**HEADLINE WARS** Weyler’s actions fueled a war over newspaper circulation that had developed between the American newspaper tycoons William Randolph Hearst and Joseph Pulitzer. To lure readers, Hearst’s *New York Journal* and Pulitzer’s *New York World* printed exaggerated accounts—by reporters such as James Creelman—of “Butcher” Weyler’s brutality. Stories of poisoned wells and of children being thrown to the sharks deepened American sympathy for the rebels. This sensational style of writing, which exaggerates the news to lure and enrage readers, became known as **yellow journalism**.

Hearst and Pulitzer fanned war fever. When Hearst sent the gifted artist Frederic Remington to Cuba to draw sketches of reporters’ stories, Remington informed the publisher that a war between the United States and Spain seemed very unlikely. Hearst reportedly replied, “You furnish the pictures and I’ll furnish the war.”

**THE DE LÔME LETTER** American sympathy for “Cuba Libre!” grew with each day’s headlines. When President William McKinley took office in 1897, demands for American intervention in Cuba were on the rise. Preferring to avoid war with Spain, McKinley tried diplomatic means to resolve the crisis. At first, his efforts appeared to succeed. Spain recalled General Weyler, modified the policy regarding concentration camps, and offered Cuba limited self-government.

## KEY PLAYER



**JOSÉ MARTÍ**  
1853–1895

The Cuban political activist José Martí dedicated his life to achieving independence for Cuba. Expelled from Cuba at the age of 16 because of his revolutionary activities, Martí earned a master’s degree and a law degree. He eventually settled in the United States.

Wary of the U.S. role in the Cuban struggle against the Spanish, Martí warned, “I know the Monster, because I have lived in its lair.” His fears of U.S. imperialism turned out to have been well-founded. U.S. troops occupied Cuba on and off from 1906 until 1922.

Martí died fighting for Cuban independence in 1895. He is revered today in Cuba as a hero and martyr.

*America Claims an Empire* 347

## KEY PLAYER

### José Martí

Martí admired one aspect of America—its promotion of personal freedom and individual rights. “One is able to breathe freely, to possess here freedom, [which is] the basis, emblem, and essence of life. Here one can feel proud of one’s species.” Ask students to discuss other aspects of the United States that foreigners might view favorably.

In-Depth Resources: Unit 3  
· American Lives: José Martí, p. 45

## Instruct: Objective 2

### War Fever Escalates

- How did the Spanish react to the uprising in Cuba?
- What factors helped to arouse American feelings of animosity toward Spain?

In-Depth Resources: Unit 3  
· Guided Reading, p. 25  
· American Lives: William Randolph Hearst, p. 46

## More About . . .

### Yellow Journalism

One of Hearst’s gimmicks to boost newspaper sales was a color comic strip. The term *yellow journalism* comes from the comic strip’s main character, “The Yellow Kid.” Hearst’s and Pulitzer’s role in sensationalizing events such as the sinking of the *Maine* prompted this response from the editor of the *New York Evening Post*: “Nothing so disgraceful . . . has been known in the history of American journalism.”

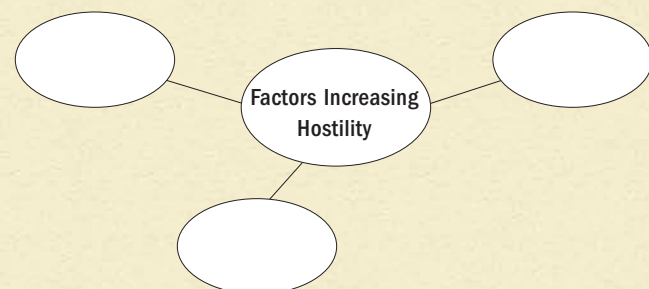
## DIFFERENTIATING INSTRUCTION LESS PROFICIENT READERS

### Analyzing the Increasing Hostility Toward Spain **ELPS** 4D, 4G

Prereading support can help students who may have difficulty understanding the factors that brought the United States and Spain to the brink of war. Have students create a web diagram, such as the one shown here, explaining the factors mentioned on pages 347 and 348. In the diagram, the students should:

- Label the three ovals: Yellow Journalism, The De Lôme letter, Explosion of U.S.S. *Maine*.
- Within each of the three ovals explain each factor in their own words.

Encourage students to use the diagram during class discussion of the section



*America Claims an Empire* 347

## Connections Across Time

1911 AND 1976

The Mystery of the *Maine*


Two different theories have emerged about what caused the mysterious explosion onboard the *Maine*. In 1911, the U.S. Army Corps of Engineers examined the *Maine* on the ocean floor. Based on the discovery of a piece of the ship's hull that was dented from the outside and bent inward, it was determined that a small mine had rocked the vessel.

In 1976, navy researchers examined the piece of bent hull and the photographs taken during the 1911 probe. They concluded that a massive internal explosion had caused the ship's damage. The most likely cause of the explosion was a spontaneous fire in a coal bunker that ignited a nearby supply of weapons.

## Instruct: Objective 3

## War with Spain Erupts

- Where was the Spanish-American War fought?
- What were the consequences of the war for Spain and the United States?
- Why did the Treaty of Paris cause such debate among Americans?

-  In-Depth Resources: Unit 3
- Guided Reading, p. 25
  - Primary Source: Newspaper Front Page, p. 38

In February 1898, however, the *New York Journal* published a private letter written by Enrique Dupuy de Lôme, the Spanish minister to the United States. A Cuban rebel had stolen the letter from a Havana post office and leaked it to the newspaper, which was thirsty for scandal. The de Lôme letter criticized President McKinley, calling him “weak” and “a bidder for the admiration of the crowd.” The embarrassed Spanish government apologized, and the minister resigned. Still, Americans were angry over the insult to their president.

**THE U.S.S. MAINE EXPLODES** Only a few days after the publication of the de Lôme letter, American resentment toward Spain turned to outrage. Early in 1898, President McKinley had ordered the **U.S.S. *Maine*** to Cuba to bring home American citizens in danger from the fighting and to protect American property. On February 15, 1898, the ship blew up in the harbor of Havana. More than 260 men were killed.

At the time, no one really knew why the ship exploded; however, American newspapers claimed that the Spanish had blown up the ship. The *Journal's* headline read “The warship *Maine* was split in two by an enemy's secret infernal machine.” Hearst's paper offered a reward of \$50,000 for the capture of the Spaniards who supposedly had committed the outrage. **B**

## 3 War with Spain Erupts

Now there was no holding back the forces that wanted war. “Remember the *Maine!*” became the rallying cry for U.S. intervention in Cuba. It made no difference that the Spanish government agreed, on April 9, to almost everything the United States demanded, including a six-month cease-fire.

**B. Answer**  
Publication of the de Lôme letter, which criticized President McKinley, and the explosion of the U.S.S. *Maine*, which many Americans blamed on Spain.

## MAIN IDEA

## Summarizing

**B** What events increased the tension between the United States and Spain?



▲ When the U.S.S. *Maine* exploded in the harbor of Havana, newspapers like the *New York Journal* were quick to place the blame on Spain.

348 CHAPTER 10

## ACTIVITY SKILLBUILDER LESSON




## BLOCK SCHEDULING

## Analyzing Assumptions and Biases

**Explaining the Skill** Bias, or a prejudiced point of view, often appears in primary sources and other materials that historians use. Biased material usually favors a special point of view and may not convey the truth about an event or issue. One strategy for detecting bias is to analyze the writer's reasons for writing about the topic.

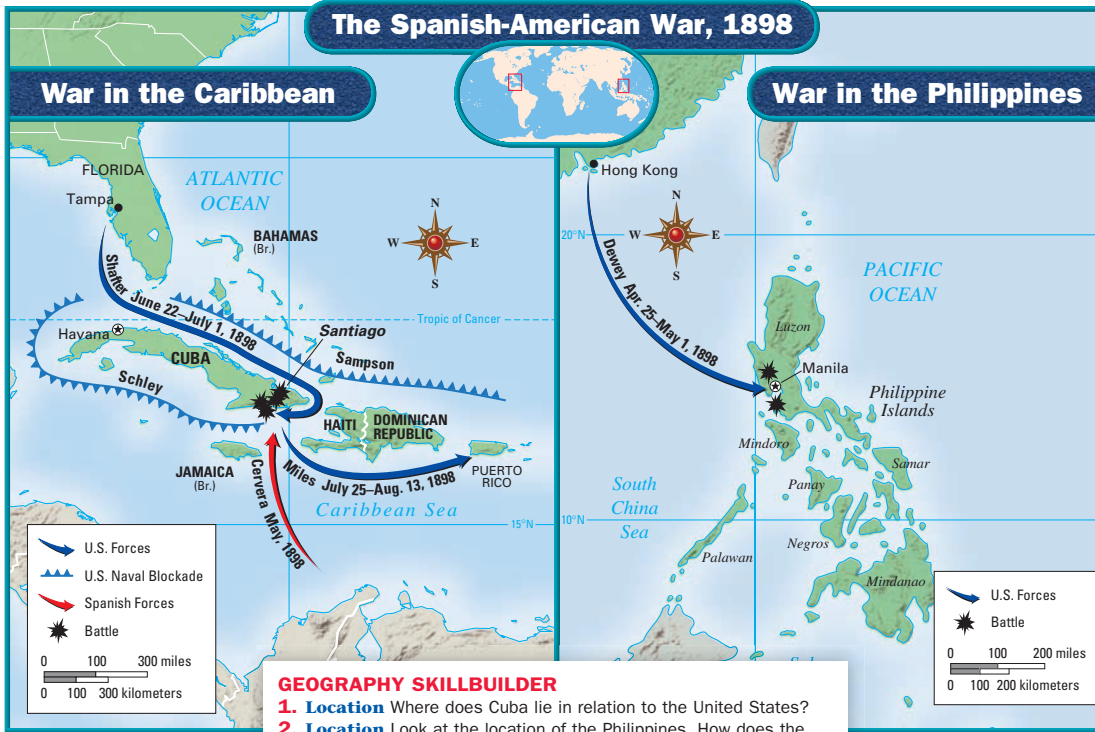
**Applying the Skill** On the chalkboard write the *New York Journal's* headline, “THE WARSHIP MAINE WAS SPLIT IN TWO BY AN ENEMY'S SECRET INFERNAL MACHINE.” What were the views of William Randolph Hearst, publisher of the *Journal*, concerning Cuba? (He wanted the United States to go to war with Spain over Cuba. Stories about Cuba were selling subscriptions to the paper.)

-  In-Depth Resources: Unit 3
- Skillbuilder Practice: Analyzing Biases, p. 29

## The Spanish-American War, 1898

## War in the Caribbean

## War in the Philippines



## GEOGRAPHY SKILLBUILDER

- 1. Location** Where does Cuba lie in relation to the United States?
- 2. Location** Look at the location of the Philippines. How does the map help explain why Spain was surprised by the American attack in the Philippines?

## Skillbuilder Answer

- 1.** Cuba lies close to the United States, to the south of Florida.
- 2.** The Philippines lie in the Pacific, hundreds of miles away from the United States. Spain would not be expecting U.S. forces to come from Hong Kong.

## MAIN IDEA

## Analyzing Events

**C** How did the Spanish try to avoid war with the United States?

**C. Answer** The Spanish agreed to all of the demands of the United States, including a six month cease fire.

Despite the Spanish concessions, public opinion favored war. On April 11, McKinley asked Congress for authority to use force against Spain. After a week of debate, Congress agreed, and on April 20 the United States declared war. **C**

**THE WAR IN THE PHILIPPINES** The Spanish thought the Americans would invade Cuba. But the first battle of the war took place in a Spanish colony on the other side of the world—the Philippine Islands.

On April 30, the American fleet in the Pacific steamed to the Philippines. The next morning, Commodore **George Dewey** gave the command to open fire on the Spanish fleet at Manila, the Philippine capital. Within hours, Dewey's men had destroyed every Spanish ship there. Dewey's victory allowed U.S. troops to land in the Philippines.

Dewey had the support of the Filipinos who, like the Cubans, also wanted freedom from Spain. Over the next two months, 11,000 Americans joined forces with Filipino rebels led by Emilio Aguinaldo. In August, Spanish troops in Manila surrendered to the United States.

**THE WAR IN THE CARIBBEAN** In the Caribbean, hostilities began with a naval blockade of Cuba. Admiral William T. Sampson effectively sealed up the Spanish fleet in the harbor of Santiago de Cuba.

Dewey's victory at Manila had demonstrated the superiority of United States naval forces. In contrast, the army maintained only a small professional force, supplemented by a larger inexperienced and ill-prepared volunteer force. About

## HISTORY from VISUALS

## Interpreting the Map

Point out to students that the row of small triangles in the map on the left indicates the extent of the U.S. naval blockade. Have students consult a globe to help them understand the location of the Philippines shown in the map on the right in relation to the United States.

**Extension** Remind students of Alfred T. Mahan's argument for a strong U.S. navy in his book, *The Influence of Sea Power upon History 1660–1783* (see page 343). Have students discuss the possible effects of a naval blockade on a country.

## More About . . .

## Commodore George Dewey

Commodore Dewey's success in the Philippines made him a hero in the United States. With his popularity so high, Dewey ran for the presidency in 1900. He soon discovered, however, that running for high office is difficult, even for war heroes. After a series of campaign blunders, including an admission that he never voted, Dewey soon gave up his run for the White House.

## ACTIVITY LINK TO WORLD HISTORY

Examining the History of the Philippines **ELPS** 3E, 3H

**Class Time** 45 minutes

**Task** Creating a short history of the Philippines

**Purpose** To provide background for learning about U.S. involvement in the Philippines


**Directions** Divide students into small groups. Each group should be responsible for researching and writing about a particular period or aspect of Philippine history up to 1920 (social, economic, or political). Students should provide a list of the Internet and library sources that they used. Have each group choose one student to present the group's findings to the class.

Integrated Assessment  
• Rubric 5

More About . . .

**Battle of San Juan Hill**

Twenty years after the battle, Roosevelt stated, “San Juan was the great day of my life.” He believed that he deserved the Congressional Medal of Honor for his part in the war, but the award was denied him.


 In-Depth Resources: Unit 3  
 · Primary Sources: from *The Rough Riders*, by Theodore Roosevelt, p. 39

Tracing Themes

AMERICA IN WORLD AFFAIRS

**U.S. Imperialism**

The United States wanted to take over the Philippines for a number of reasons. The U.S. government wanted to forestall Germany and other imperialist countries. Many people believed that an independent Philippine Republic would lead to a scramble for territory by several European countries. The United States also needed new markets for its exports and believed that China, with its vast population, would be a promising choice. The Philippines would provide a commercial base in that part of the world.

 In-Depth Resources: Unit 3  
 · Primary Source: In Favor of Imperialism, p. 40

TEKS Extension: 4B

**Guam**

Spain granted control of Guam to the United States as a result of the Treaty of Paris that ended the Spanish-American War in 1898. The island became a waypoint for U.S. ships traveling to and from the Philippines. In 1950, the Organic Act of Guam established Guam as an unincorporated organized territory of the United States. This legislation granted the residents U.S. citizenship and provided for limited self-government.

125,000 Americans had volunteered to fight. The new soldiers were sent to training camps that lacked adequate supplies and effective leaders. Moreover, there were not enough modern guns to go around, and the troops were outfitted with heavy woolen uniforms unsuitable for Cuba’s tropical climate. In addition, the officers—most of whom were Civil War veterans—had a tendency to spend their time recalling their war experiences rather than training the volunteers.

**ROUGH RIDERS** Despite these handicaps, American forces landed in Cuba in June 1898 and began to converge on the port city of Santiago. The army of 17,000 included four African-American regiments of the regular army and the **Rough Riders**, a volunteer cavalry under the command of Leonard Wood and Theodore Roosevelt. Roosevelt, a New Yorker, had given up his job as Assistant Secretary of the Navy to lead the group of volunteers. He would later become president of the United States.

The most famous land battle in Cuba took place near Santiago on July 1. The first part of the battle, on nearby Kettle Hill, featured a dramatic uphill charge by the Rough Riders and two African-American regiments, the Ninth and Tenth Cavalries. Their victory cleared the way for an infantry attack on the strategically important **San Juan Hill**. Although Roosevelt and his units played only a minor role in the second victory, U.S. newspapers declared him the hero of San Juan Hill.

Two days later, the Spanish fleet tried to escape the American blockade of the harbor at Santiago. The naval battle that followed, along the Cuban coast, ended in the destruction of the Spanish fleet. On the heels of this victory, American troops invaded Puerto Rico on July 25.

**TREATY OF PARIS** The United States and Spain signed an armistice, or cease-fire agreement, on August 12. It ended what Secretary of State John Hay called “a splendid little war.” The actual fighting in the war had lasted only 15 weeks.

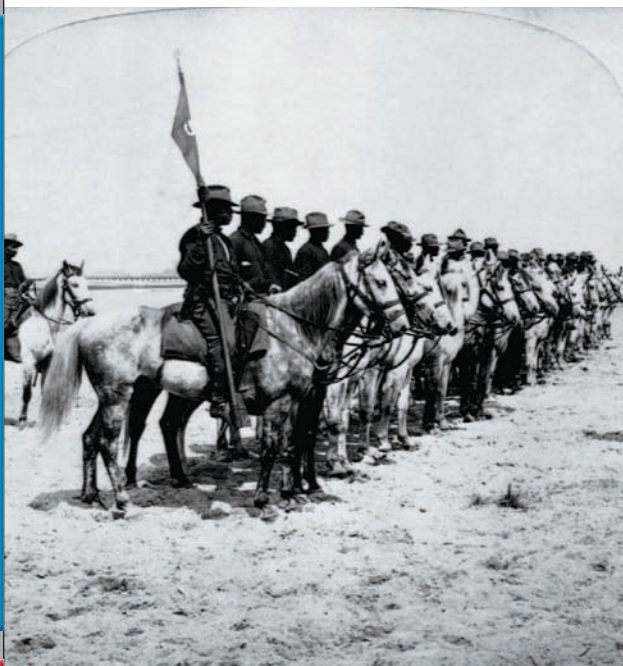
On December 10, 1898, the United States and Spain met in Paris to agree on a treaty. The terms of the peace treaty proved costly for Spain. The Spanish had to give up all claims to Cuba and cede Puerto Rico in the West Indies and the Pacific island of Guam to the United States. Spain also turned control of the Philippines over to the United States in exchange for a \$20 million payment.

On the whole, the American victory in the Spanish-American War was sweet. Still, the United States paid a heavy toll for the war. The monetary costs amounted to roughly \$250 million. In addition, some 2,000 soldiers died, not from battle wounds but from yellow fever.

Despite the lives lost and the dollars spent, the Spanish-American War had a huge payoff for the United States. Senator Henry Cabot Lodge of Massachusetts noted that although the war was very brief, “its results were many, startling, and of world-wide meaning.”

**Background**

The Rough Riders trained as cavalry but fought on foot because their horses didn’t reach Cuba in time.



▲ These African-American troops prepare for battle during the Spanish-American War.


**D. Answer** Spain freed Cuba and turned over the islands of Guam and Puerto Rico to the United States. Spain also sold the Philippines to the United States for \$20 million.

**MAIN IDEA**

**Summarizing**  
 D What were the terms of the Treaty of Paris?

ACTIVITY COOPERATIVE LEARNING

 BLOCK SCHEDULING


**Covering the Rough Riders**  3E

**Class Time** 45 minutes

**Task** Role-playing as reporters and members of the Rough Riders to create a TV news broadcast about the key battles of the war in Cuba

**Purpose** To help students better understand the major battles of the Spanish-American War and the reasons why the United States won

**Directions** Have student pairs do further research on the Rough Riders as well as the battles of Kettle Hill and San Juan Hill. One student will play a reporter, while the other plays members of the Rough Riders. The students should write a script for the news broadcast. The reporter will interview the Rough Rider about his experiences in the war for the class.

 Integrated Assessment  
 · Rubric 3

The United States now moved into the ranks of imperialist nations. Its new overseas territories gave it more bases for trade and for resupplying its navy. Within a year, it would capitalize on its new economic and military strength to acquire the Pacific island of Samoa. Expansionists expressed delight over the country's growing power, but the quest for empire troubled many Americans.

**DEBATE OVER THE TREATY** The **Treaty of Paris** touched off a great debate in the United States. Some people who favored annexation believed that the United States had a duty to spread its values overseas. President McKinley told a group of Methodist ministers that he had prayed for guidance on Philippine annexation and had concluded “that there was nothing left for us to do but to take them all [the Philippine Islands], and to educate the Filipinos, and uplift and Christianize them.” In fact, most Filipinos had been Christian for centuries.

Strengthening the position of the United States as a world power was a key issue in the debate. Many Americans wanted the Philippines for their economic and strategic value. Located on the route to China, the Philippines would be useful as a place to refuel and resupply ships. As a result, many expansionists wanted to annex the Philippines before they fell into the hands of Germany, Japan, or another nation.

Other prominent Americans presented a variety of arguments—political, moral, and economic—against annexation. Some felt that the treaty violated the Declaration of Independence by denying self-government to the newly acquired territories. The African-American educator Booker T. Washington argued that the United States should settle race-related issues at home before taking on social problems elsewhere. The labor leader Samuel Gompers feared that Filipino immigrants would compete for American jobs.

On February 6, 1899, the annexation question was settled with the Senate's approval of the Treaty of Paris. The United States now had an empire that included Guam, Puerto Rico, and the Philippines. The next question Americans faced was how and when the United States would add to its dominion.

## TEKS Extension: 4A


### Henry Cabot Lodge

Lodge, a U.S. senator from Massachusetts, was one of the significant individuals who helped to move the United States into the position of a world power. He wanted the United States to be more involved in foreign affairs. He recognized the economic opportunities to be gained by selling American goods in China and supported Hay's Open Door policy. He also supported U.S. intervention in Cuba and called for the annexation of the Philippines following the Spanish-American War.

## Assess & Reteach

### SECTION 2 ASSESSMENT

Have the students work in small groups to answer the questions in the section assessment.


-  Formal Assessment
- Section Quiz, p. 194

### SELF-ASSESSMENT

Have pairs of students use the Main Idea questions to review the main ideas in this section. Students should locate the portion of the text that helps answer each question.

### RETEACH

Have groups of students work together to outline the main points of each boldfaced heading in this section. Groups should share their outlines with the class.

-  In-Depth Resources: Unit 3
- Reteaching Activity, p. 31

## SECTION 2

### ASSESSMENT

**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

- José Martí
- yellow journalism
- George Dewey
- San Juan Hill
- Valeriano Weyler
- U.S.S. *Maine*
- Rough Riders
- Treaty of Paris

### MAIN IDEA

#### 2. USING YOUR NOTES

In 1898, a debate raged in the United States over whether the U.S. had the right to annex the Philippines. Use a graphic organizer like the one below to summarize the pros and cons of this debate.



Which side do you support? Why?

### CRITICAL THINKING

#### 3. MAKING INFERENCES

What do you think were the unstated editorial policies of yellow journalism? Support your answer with evidence from the text.

##### Think About:

- James Creelman's account of Spanish atrocities against Cubans (page 346)
- Hearst's remark to Remington
- the *Journal* headline about the explosion of the battleship *Maine*

#### 4. ANALYZING EFFECTS

Many anti-imperialists worried that imperialism might threaten the American democratic system. How might this happen?

#### 5. EXPLAINING IMPACT

Why did significant events move the United States into the position of a world power? How did the Spanish-American War factor into this shift?

### 1. TERMS & NAMES

José Martí, p. 347  
 Valeriano Weyler, p. 347  
 yellow journalism, p. 347  
 U.S.S. *Maine*, p. 348  
 George Dewey, p. 349  
 Rough Riders, p. 350  
 San Juan Hill, p. 350  
 Treaty of Paris, p. 350

### 2. USING YOUR NOTES

**In favor:** to educate the people and make them Christians  
**Against:** Annexation would be a violation of self-government, which is guaranteed by the Constitution.

### 3. MAKING INFERENCES

To create news rather than to document it; to sensationalize events by distorting the truth; to exploit the public's

fears; to manipulate the public's perceptions of events; to write articles that sell newspapers; to advance the newspaper publisher's political views

### 4. ANALYZING EFFECTS

Imperialism does not consider the rights of native peoples. It violates basic rights granted to Americans by the Declaration of Independence and the U.S. Constitution.

### 5. EXPLAINING IMPACT

As a result of the Spanish-American War, the United States gained control of Cuba, Puerto Rico, Guam, and the Philippines. Together with Alaska and Hawaii, the United States now had strategic locations to aid trade and resupply the navy.



## OBJECTIVES

- 1 Describe U.S. involvement in Puerto Rico and in Cuba
- 2 Identify causes and effects of the Philippine-American War.
- 3 Explain the purpose of the Open Door Policy in China.
- 4 Summarize the views regarding U.S. imperialism.

**TEKS 4A** explain why significant events, policies, and individuals such as the Spanish-American War, U.S. expansionism, Henry Cabot Lodge, Alfred Thayer Mahan, Theodore Roosevelt, Sanford B. Dole, and missionaries moved the United States into the position of a world power **4B** evaluate American expansionism, including acquisitions such as Guam, Hawaii, the Philippines, and Puerto Rico **15C** explain how foreign policies affected economic issues such as the Chinese Exclusion Act of 1882, the Open Door Policy, Dollar Diplomacy, and immigration quotas

## Focus & Motivate


Ask students how they try to convince their parents to give them greater independence. Then ask them how colonial populations might convince the United States to grant them greater freedom and self-government.

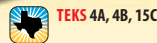
## Instruct

### Instruct: Objective 1

#### Ruling Puerto Rico / Cuba and the United States

- What was the significance of the Foraker Act?
- What did the Platt Amendment state?
- Why did the United States wish to attain a strong influence in Cuba?

 In-Depth Resources: Unit 3  
• Guided Reading, p. 26



## SECTION 3

# Acquiring New Lands

### MAIN IDEA

In the early 1900s, the United States engaged in conflicts in Puerto Rico, Cuba, and the Philippines.

### WHY IT MATTERS NOW

Today, the United States maintains a strong military and political presence in strategic worldwide locations.

### Terms & Names

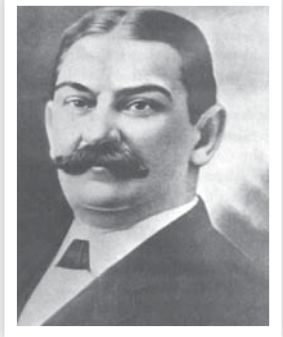
- Foraker Act
- Platt Amendment
- protectorate
- Emilio Aguinaldo
- John Hay
- Open Door notes
- Boxer Rebellion

## One American's Story



Use the graphic organizer online to take notes on key events relating to U.S. relations with Cuba, Puerto Rico, and the Philippines.

When Puerto Rico became part of the United States after the Spanish-American War, many Puerto Ricans feared that the United States would not give them the measure of self-rule that they had gained under the Spanish. Puerto Rican statesman and publisher Luis Muñoz Rivera was one of the most vocal advocates of Puerto Rican self-rule. Between 1900 and 1916, he lived primarily in the United States and continually worked for the independence of his homeland. Finally, in 1916, the U.S. Congress, facing possible war in Europe and wishing to settle the issue of Puerto Rico, invited Muñoz Rivera to speak. On May 5, 1916, Muñoz Rivera stood before the U.S. House of Representatives to discuss the future of Puerto Rico.



▲ Luis Muñoz Rivera

### A PERSONAL VOICE LUIS MUÑOZ RIVERA

“You, citizens of a free fatherland, with its own laws, its own institutions, and its own flag, can appreciate the unhappiness of the small and solitary people that must await its laws from your authority. . . . when you acquire the certainty that you can found in Puerto Rico a republic like that founded in Cuba and Panama . . . give us our independence and you will stand before humanity as . . . a great creator of new nationalities and a great liberator of oppressed peoples.”


—quoted in *The Puerto Ricans*


Muñoz Rivera returned to Puerto Rico where he died in November 1916. Three months later, the United States made Puerto Ricans U.S. citizens.


## 1 Ruling Puerto Rico


Not all Puerto Ricans wanted independence, as Muñoz Rivera did. Some wanted statehood, while still others hoped for some measure of local self-government as an American territory. As a result, the United States gave Puerto Ricans no promises regarding independence after the Spanish-American War.


## PROGRAM RESOURCES

 In-Depth Resources: Unit 3  
• Guided Reading, p. 26  
• Reteaching Activity, p. 32


 Guided Reading Workbook  
• Section 3


 Spanish/English Guided Reading Workbook  
• Section 3

 Access for Students Acquiring English/ESL  
• Guided Reading (Spanish), p. 126


 Formal Assessment  
• Section Quiz, p. 195


## INTEGRATED TECHNOLOGY


 Humanities Transp. HT17, HT37  
• Athletic Contest  
• Declined with Thanks

 hmhsocialstudies.com

## TEST-TAKING RESOURCES

 Strategies for Test Preparation

 Test Practice Transparencies TT69

 Online Test Practice

**A. Answer** Puerto Rico was strategically important to the United States, both for maintaining a presence in the Caribbean and for protecting a future canal that American leaders wanted to build across the Isthmus of Panama.

#### MAIN IDEA

#### Analyzing Issues

**A** Why was Puerto Rico important to the United States?

**MILITARY RULE** During the Spanish-American War, United States forces, under General Nelson A. Miles, occupied the island. As his soldiers took control, General Miles issued a statement assuring Puerto Ricans that the Americans were there to “bring you protection, not only to yourselves but to your property, to promote your prosperity, and to bestow upon you the immunities and blessings of the liberal institutions of our government.” For the time being, Puerto Rico would be controlled by the military until Congress decided otherwise.

**RETURN TO CIVIL GOVERNMENT** Although many Puerto Ricans had dreams of independence or statehood, the United States had different plans for the island’s future. Puerto Rico was strategically important to the United States, both for maintaining a U.S. presence in the Caribbean and for protecting a future canal that American leaders wanted to build across the Isthmus of Panama. In 1900, Congress passed the **Foraker Act**, which ended military rule and set up a civil government. The act gave the president of the United States the power to appoint Puerto Rico’s governor and members of the upper house of its legislature. Puerto Ricans could elect only the members of the legislature’s lower house. **A**

In 1901, in the Insular Cases, the U.S. Supreme Court ruled that the Constitution did not automatically apply to people in acquired territories. Congress, however, retained the right to extend U.S. citizenship, and it granted that right to Puerto Ricans in 1917. It also gave them the right to elect both houses of their legislature.

## 1 Cuba and the United States

When the United States declared war against Spain in 1898, it recognized Cuba’s independence from Spain. It also passed the Teller Amendment, which stated that the United States had no intention of taking over any part of Cuba. The Treaty of Paris, which ended the war, further guaranteed Cuba the independence that its nationalist leaders had been demanding for years.


**AMERICAN SOLDIERS** Though officially independent, Cuba was occupied by American troops when the war ended. José Martí, the Cuban patriot who had led the movement for independence from Spain, had feared that the United States would merely replace Spain and dominate Cuban politics. In some ways, Martí’s prediction came true. Under American occupation, the same officials who had served Spain remained in office. Cubans who protested this policy were imprisoned or exiled.

On the other hand, the American military government provided food and clothing for thousands of families, helped farmers put land back into cultivation, and organized elementary schools. Through improvement of sanitation and medical research, the military government helped eliminate yellow fever, a disease that had killed hundreds of Cubans each year.

#### Background

Yellow fever damages many body parts, especially the liver. Dr. Carlos Finlay discovered that the disease is carried by mosquitoes. Clearing out the mosquitoes’ breeding places helped eliminate the disease in Cuba.

NOW & THEN



PUERTO RICO

Ever since their transfer under the Treaty of Paris from Spain to the United States, Puerto Ricans have debated their status, as shown above. In 1967, 1993, and 1998, Puerto Ricans rejected both statehood and independence in favor of commonwealth, a status given the island in 1952.

As members of a commonwealth, Puerto Ricans are U.S. citizens. They can move freely between the island and the mainland and are subjected to the military draft but cannot vote in U.S. presidential elections. A majority of Puerto Ricans have rejected statehood because they fear it would mean giving up their Latino culture.

## NOW & THEN

### Puerto Rico

**Analyzing Issues** Have groups of students research Puerto Rico’s latest vote to choose statehood, independence, or commonwealth status. The students should divide into three smaller groups, with one group presenting the arguments for statehood, one group presenting the arguments of those favoring independence, and a third presenting arguments for remaining a commonwealth. Have the three groups discuss their findings with each other.

## Tracing Themes

### CIVIL RIGHTS

#### Constitutional Protections for Territories

The U.S. Constitution does not explicitly address the rights of people in acquired territories. The U.S. Supreme Court ultimately ruled that the Constitution does not automatically apply to residents of acquired territories. Some justices disagreed with this view, including Justice John Marshall Harlan. He wrote that, in essence, the Constitution should follow the flag.

Today, the “war on terror” and the conflict in Iraq are raising important questions about the constitutional rights of detainees held beyond U.S. borders.


## DIFFERENTIATING INSTRUCTION

## GIFTED AND TALENTED

### Researching the Insular Cases

The Insular Cases were some 14 U.S. Supreme Court decisions from 1901 to 1904 that addressed the application of the U.S. Constitution to overseas territories. Have interested students research one of the cases using the Internet and library resources, and write a report on the decision. In writing their report, students should address the questions at the right, among others.

- What legal arguments did each side put forth in the case?
- Why did the Court rule the way it did?
- If the Court’s ruling was not unanimous, what view did the dissenting justices take?

 **Integrated Assessment**  
• Rubric 1, 5

More About . . .

**The Platt Amendment**

The Platt Amendment was named after Senator Orville Platt of Connecticut, chairman of the Senate Committee on Cuban Relations. Much of the document was crafted by Secretary of War Elihu Root, who made no secret of his opinion that the Cuban people lacked the ability to govern themselves. Not surprisingly, the Platt Amendment met with great opposition from the Cuban people. Juan Gualberto Gómez, a leader in the fight against Spain, angrily declared that the amendment had “reduced the independence and sovereignty of the Cuban republic to a myth.”

Analyzing Political Cartoons

**SKILLBUILDER ANSWERS**

1. Bill of fare: Cuba Steak, Porto Rico pig, Philippine Floating Islands, Sandwich Islands
2. The waiter portrays President William McKinley, who was a staunch imperialist.
3. Uncle Sam’s attitude seems to be that he can have the pick of anything on the menu.

**PLATT AMENDMENT** In 1900 the newly formed Cuban government wrote a constitution for an independent Cuba. The constitution, however, did not specify the relationship between Cuba and the United States. Consequently, in 1901, the United States insisted that Cuba add to its constitution several provisions, known as the **Platt Amendment**, stating that

- Cuba could not make treaties that might limit its independence or permit a foreign power to control any part of its territory
- the United States reserved the right to intervene in Cuba
- Cuba was not to go into debt that its government could not repay
- the United States could buy or lease land on the island for naval stations and refueling stations

The United States made it clear that its army would not withdraw until Cuba adopted the Platt Amendment. In response, a torchlight procession marched on the residence of Governor-General Leonard Wood in protest. Some protestors even called for a return to arms to defend their national honor against this American insult. The U.S. government stood firm, though, and Cubans reluctantly ratified the new constitution. In 1903, the Platt Amendment became part of a treaty between the two nations, and it remained in effect for 31 years. Under the terms of the treaty, Cuba became a U.S. **protectorate**, a country whose affairs are partially controlled by a stronger power.

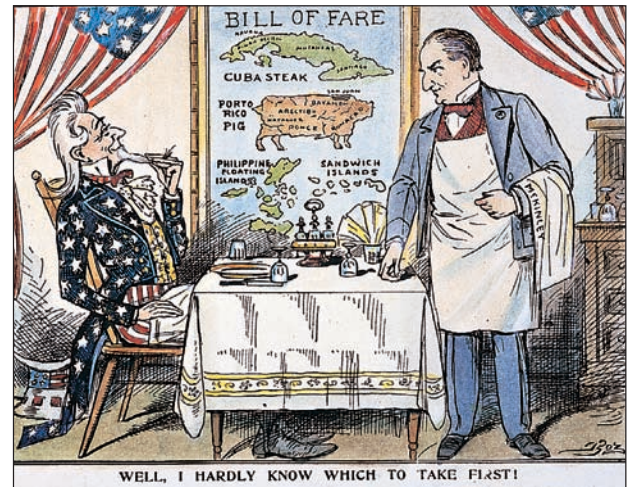
**PROTECTING AMERICAN BUSINESS INTERESTS** The most important reason for the United States to maintain a strong political presence in Cuba was to protect American businesses that had invested in the island’s sugar, tobacco, and mining industries, as well as in its railroads and public utilities.

**Vocabulary**  
**ratify:** to make valid by approving

Analyzing Political Cartoons

**“WELL, I HARDLY KNOW WHICH TO TAKE FIRST!”**

Throughout the early 1900s, the United States intervened in the affairs of its Latin American neighbors several times. American troops withdrew from Cuba in 1902 but later returned three times to quell popular uprisings against conservative leaders. The U.S. also intervened in Nicaragua and Haiti. Not surprisingly, few Latin Americans welcomed United States intervention. As the cartoon shows, the United States had a different point of view.



**SKILLBUILDER**  
**Analyzing Political Cartoons**

1. What is on the bill of fare, or menu, in this restaurant?
2. Which president does the waiter portray?
3. What seems to be Uncle Sam’s attitude toward the offerings on the menu?

DIFFERENTIATING INSTRUCTION LESS PROFICIENT READERS

Analyzing the Platt Amendment **ELPS** 4D

Help students understand why the United States insisted on the Platt Amendment in Cuba’s constitution. List each provision on the board as shown at the right. Ask students to think of a reason why each provision would be advantageous to the United States. (Example: Provision 4, the United States could buy or lease land—then the United States could carry on business.) To help students get ideas, have them reread the text under “Protecting American Business Interests” on pages 354–355. Support ELL language acquisition by reviewing concrete and abstract vocabulary related to the case.

Provisions	Advantages for the United States
1. Cuba could not make treaties that might limit its independence.	
2. The United States reserved the right to intervene in Cuba.	
3. Cuba was not to go into debt.	
4. The United States could buy or lease land.	

Although many businesspeople were convinced that annexing and imposing colonial rule on new territories was necessary to protect American business interests, some were concerned about colonial entanglements. The industrialist Andrew Carnegie argued against the taking of nations as colonies.

### A PERSONAL VOICE ANDREW CARNEGIE

“The exports of the United States this year [1898] are greater than those of any other nation in the world. Even Britain’s exports are less, yet Britain ‘possesses’ . . . a hundred ‘colonies’ . . . scattered all over the world. The fact that the United States has none does not prevent her products and manufactures from invading . . . all parts of the world in competition with those of Britain.”

—quoted in *Distant Possessions*

Despite such concerns, the U.S. state department continued to push for control of its Latin American neighbors. In the years to come, the United States would intervene time and again in the affairs of other nations in the Western Hemisphere.

## 2 Filipinos Rebel

In the Philippines, Filipinos reacted with outrage to the Treaty of Paris, which called for American annexation of the Philippines. The rebel leader **Emilio Aguinaldo** (é-mēl’yō ä’gē-nāl’dlō) believed that the United States had promised independence. When he and his followers learned the terms of the treaty, they vowed to fight for freedom.

**PHILIPPINE-AMERICAN WAR** In February 1899, the Filipinos, led by Aguinaldo, rose in revolt. The United States assumed almost the same role that Spain had played, imposing its authority on a colony that was fighting for freedom. When Aguinaldo turned to guerrilla tactics, the United States forced Filipinos to live in designated zones, where poor sanitation, starvation, and disease killed thousands. This was the very same practice that Americans had condemned Spain for using in Cuba.

During the occupation, white American soldiers looked on the Filipinos as inferiors. However, many of the 70,000 U.S. troops sent to the Philippines were African Americans. When African-American newspapers questioned why blacks were helping to spread racial prejudice to the Philippines, some African-American soldiers deserted to the Filipino side and developed bonds of friendship with the Filipinos.

It took the Americans nearly three years to put down the rebellion. About 20,000 Filipino rebels died fighting for independence. The war claimed 4,000 American lives and cost \$400 million—20 times the price the United States had paid to purchase the islands. **B**

**AFTERMATH OF THE WAR** After suppressing the rebellion, the United States set up a government similar to the one it had established for Puerto Rico. The U.S. president would appoint a governor, who would then appoint the upper house of the legislature. Filipinos would elect the lower house. Under American rule, the Philippines moved gradually toward independence and finally became an independent republic on July 4, 1946.



▲ U.S. military action in the Philippines resulted in suffering for Filipino civilians. About 200,000 people died as a result of malnutrition, disease, and such guerrilla tactics as the burning of villages.

America Claims an Empire 355

## Instruct: Objective 2

### Filipinos Rebel

- Why did many Filipinos feel betrayed by the United States?
- How was the Philippine-American War a costly one for both the Philippines and the United States?



In-Depth Resources: Unit 3

• Guided Reading, p. 26

## Tracing Themes

### DIVERSITY AND NATIONAL IDENTITY

#### African Americans in the Philippines

Filipino rebel leader Emilio Aguinaldo recognized the irony of African Americans fighting to put down the independence movement of another oppressed people of color. He signed a proclamation that was delivered to the 24th U.S. Infantry, an African-American regiment. It read in part: “Your masters have thrown you into the . . . fight with double purpose—to make you the instrument of their ambition and also your hard work will soon make the extinction of your race.” While some African Americans did put down their weapons and abandon the American cause, many others refused to do so. African-American soldiers protested that they were “just as loyal to the old flag as white Americans.”

**B. Answer**  
Filipinos wanted independence. The U.S. wanted to govern the islands.

#### MAIN IDEA

#### Contrasting

**B** What were the aims of the Filipinos? of the Americans?

## DIFFERENTIATING INSTRUCTION

## STUDENTS ACQUIRING ENGLISH/ESL

### Vocabulary **ELPS** 2C, 2D, 4F

Help students understand these terms from the text in order to comprehend the types of rule that the United States established for Puerto Rico, Cuba, and the Philippines:

**Puerto Rico:** independence, statehood, intervention, strategically important, protecting, elect, houses of legislature

**Cuba:** protectorate, occupation, constitution, provisions, amendment, economic interests, intervene

**Philippines:** rebel, rebellion, annexation, independent republic

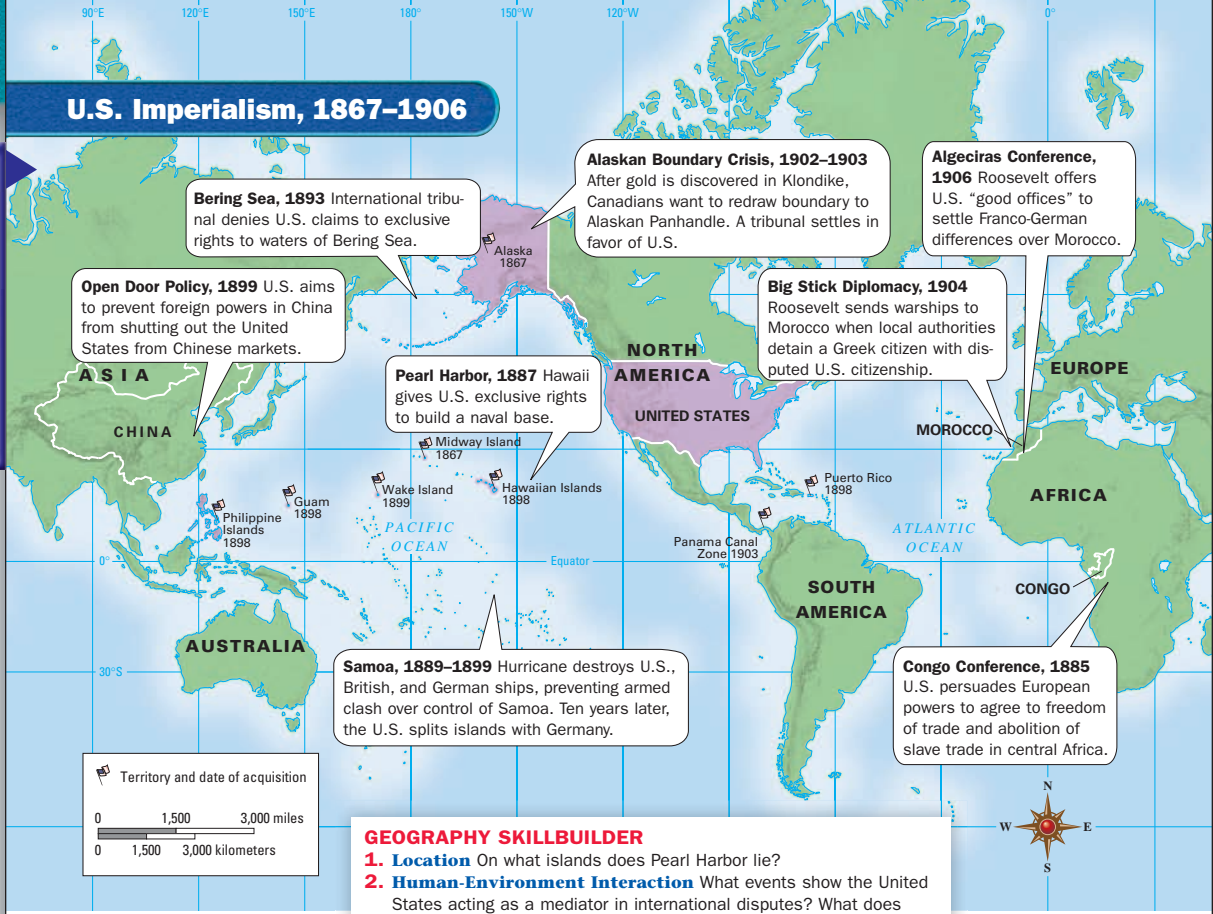
HISTORY from VISUALS

Interpreting the Map

Point out to students that the date next to each flag indicates the time when the United States gained that territory. Also remind them that—as the captions and the map title indicate—the acquisition of these territories occurred over a period of more than 30 years and several presidential administrations.



Humanities Transparencies HT37  
· Declined With Thanks



GEOGRAPHY SKILLBUILDER

- 1. Location** On what islands does Pearl Harbor lie?
- 2. Human-Environment Interaction** What events show the United States acting as a mediator in international disputes? What does this role indicate about the status of the U.S. in the world?

Skillbuilder Answers

- 1. Pearl Harbor** lies on the Hawaiian Islands.
- 2. Mediator:** The Algeciras and Congo conferences. **Status:** It shows the growing power and prestige of the United States, because other powerful nations chose the U.S. to help settle their disputes.

3 Foreign Influence in China

U.S. imperialists saw the Philippines as a gateway to the rest of Asia, particularly to China. China was seen as a vast potential market for American products. It also presented American investors with new opportunities for large-scale railroad construction.

Weakened by war and foreign intervention, China had become known as the “sick man of Asia.” France, Germany, Britain, Japan, and Russia had established prosperous settlements along the coast of China. They also had carved out spheres of influence, areas where each nation claimed special rights and economic privileges.

**JOHN HAY’S OPEN DOOR NOTES** The United States began to fear that China would be carved into colonies and American traders would be shut out. To protect American interests, U.S. Secretary of State **John Hay** issued, in 1899, a series of policy statements called the **Open Door notes**. The notes were letters addressed to the leaders of imperialist nations proposing that the nations share their trading rights with the United States, thus creating an open door. This meant that no single nation would have a monopoly on trade with any part of China. The other imperialist powers reluctantly accepted this policy. **C**

**C. Answer** To protect American access to Chinese markets and to help maintain the independence of China.

MAIN IDEA

Analyzing Causes

**C** Why did Secretary of State John Hay issue the policy statements known as the Open Door notes?

Instruct: Objective 3 Foreign Influence in China

- Why did the Western powers seek to establish spheres of influence in China?
- What were the Open Door notes?
- What were the causes and consequences of the Boxer Rebellion?

In-Depth Resources: Unit 3  
· Guided Reading, p. 26

ACTIVITY COOPERATIVE LEARNING



BLOCK SCHEDULING

Creating Posters for a Rally **ELPS** 3B, 3E, 3F

Class Time 30 minutes

**Task** Creating posters for a rally protesting American imperialism in Cuba, Puerto Rico, the Philippines, and China

**Purpose** To help students better understand the effects of imperialism on colonial peoples

**Directions** Divide students into groups of four and have each group represent one of the following: Puerto Rico, Cuba, the Philippines, and China. Have the groups create several posters expressing how U.S. imperialism affects the area that they represent. Allow time for the groups to share their posters with the class. Support ELLs by reinforcing content-based terms and abstract vocabulary as groups plan their posters. Allow students a chance to practice their presentation to help them participate more comfortably.



Integrated Assessment  
· Rubric 4



▲ During the Boxer Rebellion, shown here in this Chinese print, Chinese patriots demanded that all foreigners be expelled from the country. The Boxers surrounded the European section of Beijing and kept it under siege for several months.

**Vocabulary**  
**martial arts:**  
combat or self-defense arts that originated in East Asia, such as judo or karate

**THE BOXER REBELLION IN CHINA** Although China kept its freedom, Europeans dominated most of China's large cities. Resentment simmered beneath the surface as some Chinese formed secret societies pledged to rid the country of "foreign devils." The most famous of these secret groups were the Boxers, so named by Westerners because members practiced martial arts.

The Boxers killed hundreds of missionaries and other foreigners, as well as Chinese converts to Christianity. In August 1900, troops from Britain, France, Germany, and Japan joined about 2,500 American soldiers and marched on the Chinese capital. Within two months, the international forces put down the **Boxer Rebellion**. Thousands of Chinese people died during the fighting.

**PROTECTING AMERICAN RIGHTS** After the Boxer Rebellion, the United States feared that European nations would use their victory to take even greater control of China. To prevent this, John Hay issued a second series of Open Door notes, announcing that the United States would "safeguard for the world the principle of equal and impartial trade with all parts of the Chinese Empire." This policy paved the way for greater American influence in Asia.

The Open Door policy reflected three deeply held American beliefs about the United States industrial capitalist economy. First, Americans believed that the growth of the U.S. economy depended on exports. Second, they felt the United States had a right to intervene abroad to keep foreign markets open. Third, they feared that the closing of an area to American products, citizens, or ideas threatened U.S. survival. These beliefs became the bedrock of American foreign policy.



**VIDEO**

China:  
Boxer Uprising

[hmhsocialstudies.com](http://hmhsocialstudies.com)

**WORLD STAGE**

**THE BOXER PROTOCOL**

On September 7, 1901, China and 11 other nations signed the Boxer Protocol—a final settlement of the Boxer Rebellion.

The Qing government agreed to execute some Chinese officials, to punish others, and to pay about \$332 million in damages. The United States was awarded a settlement of \$24.5 million. It used about \$4 million to pay American citizens for actual losses incurred during the rebellion. In 1908, the U.S. government returned the rest of the money to China to be used for the purpose of educating Chinese students in their own country and in the United States.

**More About . . .**

**The Boxers**

The Boxers are believed to have formed around the beginning of the 19th century. The group's real name was I-ho ch'üan, or "The Righteous and Harmonious Fists," from which the term "Boxers" came. The Boxers opposed Christianity, the Chinese power structure, and foreigners. Most of its members were young peasant men, and those who joined the group had to follow strict lifestyle guidelines.

**ON THE WORLD STAGE**

**The Boxer Protocol**

**Analyzing Motives** Ask students why they think the United States chose to return to China some of the money it received from the Boxer Protocol settlement. (*U.S. officials hoped that by returning the money they might improve relations with China and reduce some of the resentment the Chinese might have felt about American intervention in their country.*)



Humanities Transparencies HT17

· Athletic Contest by Max Weber

*America Claims an Empire* 357

**DIFFERENTIATING INSTRUCTION** GIFTED AND TALENTED

**Investigating the Life and Rule of Empress Cixi**

Empress Cixi (also spelled Tzu Hsi), who ruled China during the Boxer Rebellion, was one of the most powerful women in the history of China. Like the Boxers, Cixi detested foreign influence in China. "The foreigners are like fish in the stewpan," she said. "For forty years have I . . . eaten bitterness because of them."

Have interested students research and report on Empress Cixi's reign and her role in the Boxer Rebellion. Students should consider the following questions:

- Why did she endorse and then eventually condemn the rebellion?
- How did she maintain power after Western nations put down the uprising?



Integrated Assessment


· Rubric 1, 5

## 4 The Impact of U.S. Territorial Gains

### Instruct: Objective 4

#### The Impact of U.S. Territorial Gains


- What did the reelection of William McKinley seem to indicate about the American public's view of imperialism?
- What view of imperialism did supporters of the Anti-Imperialism League take?

 In-Depth Resources: Unit 3  
• Guided Reading, p. 26

## Assess & Reteach

### SECTION 3 ASSESSMENT

Have students work in small groups to answer the questions. Have one student from each group read the group's answer to question 3 before the class. (If the group formed two opinions, have two students read.)


 Formal Assessment  
• Section Quiz, p. 195

### SELF-ASSESSMENT

Have students work in study groups to form answers to the inner column questions.

### RETEACH

Divide the class into five groups and have each group prepare a summary of the information under one of the section's boldfaced headings. Have each group present its summary to the class.

 In-Depth Resources: Unit 3  
• Reteaching Activity, p. 32

In 1900, Republican William McKinley, a reluctant but confirmed imperialist, was elected to a second term against Democrat William Jennings Bryan, who staunchly opposed imperialism. McKinley's reelection confirmed that a majority of Americans favored his policies. Under McKinley, the United States had gained an empire that boosted its economy and marked its debut on the world stage.

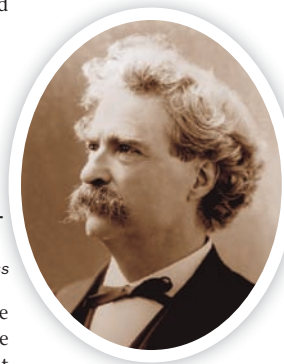
Yet even before McKinley was reelected, an Anti-Imperialist League had sprung into being. The league included some of the most prominent people in America, such as former president Grover Cleveland, industrial leader Andrew Carnegie, the social worker Jane Addams, and many leading writers. Anti-imperialists had different and sometimes conflicting reasons for their opposition, but all agreed that it was wrong for the United States to rule other people without their consent. The novelist Mark Twain questioned the motives for imperialism in a satirical piece written in 1901.

#### A PERSONAL VOICE MARK TWAIN

“Shall we go on conferring our Civilization upon the peoples that sit in darkness, or shall we give those poor things a rest? . . . Extending the Blessings of Civilization to our Brother who Sits in Darkness has been a good trade and has paid well, on the whole; and there is money in it yet . . . but not enough, in my judgment, to make any considerable risk advisable.”

—quoted in *To the Person Sitting in Darkness*

As a novelist, Twain had great influence on American culture but little influence on foreign policy. In the early 20th century, the United States under President Theodore Roosevelt and President Woodrow Wilson would continue to exert its power around the globe.



 Mark Twain



### ASSESSMENT

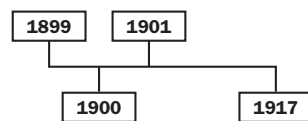
**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

- Foraker Act
- protectorate
- John Hay
- Boxer Rebellion
- Platt Amendment
- Emilio Aguinaldo
- Open Door notes

### MAIN IDEA

#### 2. USING YOUR NOTES

Create a time line of key events relating to U.S. relations with Cuba, Puerto Rico, and the Philippines. Use the dates already plotted on the time line below as a guide.



Which event do you think was most significant? Why?

### CRITICAL THINKING

#### 3. EVALUATING

How did American rule of Puerto Rico harm Puerto Ricans? How did it help Puerto Ricans? Do you think the benefits outweighed the harmful effects? Why or why not?

#### 4. COMPARING

How was U.S. policy toward China different from U.S. policy toward the Philippines? To what can you attribute the difference?

#### 5. ANALYZING ISSUES

Explain how U.S. foreign policy at the turn of the century affected economic issues. **Think About:**

- why the United States wanted access to China's markets
- the purpose of the Open Door notes
- the U.S. response to the Boxer Rebellion



### ASSESSMENT Answers

#### 1. TERMS & NAMES

Foraker Act, p. 353  
Platt Amendment, p. 354  
protectorate, p. 354  
Emilio Aguinaldo, p. 355  
John Hay, p. 356  
Open Door notes, p. 356  
Boxer Rebellion, p. 357

#### 2. USING YOUR NOTES

1899—Aguinaldo's armed revolt sparks

Philippine-American War. **1900**—Foraker Act gives the U.S. president partial control of the Puerto Rican government; McKinley is reelected as president. **1901**—Platt Amendment authorizes U.S. intervention in Cuba. **1917**—Congress grants U.S. citizenship to Puerto Ricans.

#### 3. EVALUATING

**Harm**—The people of the island were unable to choose their own government.

**Help**—The island fell under the protection of the U.S. government. **Yes**—because the United States protected Puerto Rico from the rule of harsh dictators. **No**—because the people of Puerto Rico were not granted self-government.

#### 4. COMPARING

The United States annexed the Philippines but only wanted access to trade with China. The U.S. goal in

China was to get the same rights as other trading nations. The annexation of China was never a goal.

#### 5. ANALYZING ISSUES

U.S. territorial gains lifted the economy. The U.S. government believed it had the right to intervene to keep foreign markets open to the United States. The Open Door notes were a nonmilitary attempt to get trading rights in China.

SECTION  
**4**

TEKS 4A, 12A, 15C

# America as a World Power

## MAIN IDEA

The Russo-Japanese War, the Panama Canal, and the Mexican Revolution added to America's military and economic power.

## WHY IT MATTERS NOW

American involvement in conflicts around 1900 led to involvement in World War I and later to a peacekeeper role in today's world.

## Terms & Names

- Panama Canal
- Roosevelt Corollary
- dollar diplomacy
- Francisco "Pancho" Villa
- Emiliano Zapata
- John J. Pershing

## One American's Story

hmsocialstudies.com  
**TAKING NOTES**

Use the graphic organizer online to take notes on how Teddy Roosevelt and Woodrow Wilson used American power around the world.

Joseph Bucklin Bishop, a policy adviser to the canal's chief engineer, played an important role in the building of the Panama Canal. As editor of the *Canal Record*, a weekly newspaper that provided Americans with updates on the project, Bishop described a frustrating problem that the workers encountered.

### A PERSONAL VOICE JOSEPH BUCKLIN BISHOP

"The Canal Zone was a land of the fantastic and the unexpected. No one could say when the sun went down what the condition of the Cut would be when [the sun] rose. For the work of months or even years might be blotted out by an avalanche of earth or the toppling over of a mountain of rock. It was a task to try men's souls; but it was also one to kindle in them a joy of combat . . . and a faith in ultimate victory which no disaster could shake."

—quoted in *The Impossible Dream: The Building of the Panama Canal*



▲ Workers digging the Panama Canal faced hazardous landslides and death from disease.

The building of the Panama Canal reflected America's new role as a world power. As a technological accomplishment, the canal represented a confident nation's refusal to let any physical obstacle stand in its way.

## Teddy Roosevelt and the World 1

The assassination of William McKinley in 1901 thrust Vice-President Theodore Roosevelt into the role of a world leader. Roosevelt was unwilling to allow the imperial powers of Europe to control the world's political and economic destiny. In 1905, building on the Open Door notes to increase American influence in East Asia, Roosevelt mediated a settlement in a war between Russia and Japan.

*America Claims an Empire* 359

## OBJECTIVES

- 1 Explain how Theodore Roosevelt's foreign policy promoted American power around the world.
- 2 Describe how Woodrow Wilson's missionary diplomacy ensured U.S. dominance in Latin America.

TEKS 4A explain why significant events, policies, and individuals such as the Spanish-American War, U.S. expansionism, Henry Cabot Lodge, Alfred Thayer Mahan, Theodore Roosevelt, Sanford B. Dole, and missionaries moved the United States into the position of a world power 12A analyze the impact of physical and human geographic factors on the settlement of the Great Plains, the Klondike Gold Rush, the Panama Canal, the Dust Bowl, and the levee failure in New Orleans after Hurricane Katrina 15C explain how foreign policies affected economic issues such as the Chinese Exclusion Act of 1882, the Open Door Policy, Dollar Diplomacy, and immigration quotas

## Focus & Motivate

Ask students how they would resolve a conflict between two friends. Then ask them how the United States might try to resolve a conflict between two countries.

## Instruct

### Instruct: Objective 1

#### Teddy Roosevelt and the World

- What role did President Roosevelt play in ending the Russo-Japanese War?
- What events led to the building of the Panama Canal?
- What did the Roosevelt Corollary state?
- What was dollar diplomacy?



#### In-Depth Resources: Unit 3

- Guided Reading, p. 27
- Outline Map: America Becomes a World Power, pp. 36–37
- Primary Source: Building the Panama Canal, p. 41

## PROGRAM RESOURCES



#### In-Depth Resources: Unit 3

- Guided Reading, p. 27
- Reteaching Activity, p. 33
- Geography Application: Geography of the Panama Canal, pp. 34–35
- Outline Map: America Becomes a World Power, pp. 36–37
- Primary Source: Building the Panama Canal, p. 41



#### Guided Reading Workbook

- Section 4



#### Spanish/English Guided Reading Workbook

- Section 4



#### Access for Students Acquiring English/ESL

- Guided Reading (Spanish), p. 127
- Skillbuilder Practice, p. 128
- Geography Application, pp. 129–130



#### Formal Assessment

- Section Quiz, p. 196

## INTEGRATED TECHNOLOGY



#### Geography Transp. GT18

- United States Intervenes in Latin America



#### Critical Thinking Transp. CT52

- U.S. Trade with Central America

hmsocialstudies.com

## TEST-TAKING RESOURCES



Strategies for Test Preparation



Test Practice Transparencies TT70



Online Test Practice



**KEY PLAYER**

**Theodore Roosevelt**

Theodore Roosevelt tried to promote the United States as a strong but respectful leader in international affairs. “In foreign affairs the principle from which we never deviated was to have the Nation behave toward other nations precisely as a strong, honorable, and upright man behaves in dealing with his fellow-men,” he wrote. “It is folly of the criminal type for the Nation not to keep up its navy, not to fortify its vital strategic points, and not to provide an adequate army for its needs. On the other hand, it is wicked for the Nation to fail in either justice, courtesy, or consideration when dealing with any other power, big or little.”

**More About . . .**

**Roosevelt and the Canal**

Roosevelt considered the Panama Canal the greatest accomplishment of his presidency. While he denied any role in planning the revolution that freed Panama from Colombia, he gave it covert support. He later said, “I took the canal zone and let Congress debate, and while the debate goes on the canal does also.”

**ROOSEVELT THE PEACEMAKER** In 1904, Russia and Japan, Russia’s neighbor in East Asia, were both imperialist powers, and they were competing for control of Korea. The Japanese took the first action in what would become the Russo-Japanese War with a sudden attack on the Russian Pacific fleet. To everyone’s surprise, Japan destroyed it. Japan then proceeded to destroy a second fleet sent as reinforcement. Japan also won a series of land battles, securing Korea and Manchuria.

As a result of these battles, Japan began to run out of men and money, a fact that it did not want to reveal to Russia. Instead, Japanese officials approached President Roosevelt in secret and asked him to mediate peace negotiations. Roosevelt agreed, and in 1905, Russian and Japanese delegates convened in Portsmouth, New Hampshire.

The first meeting took place on the presidential yacht. Roosevelt had a charming way of greeting people with a grasp of the hand, a broad grin, and a hearty “Dee-lighted.” Soon the opposing delegates began to relax and cordially shook hands.

The Japanese wanted Sakhalin Island, off the coast of Siberia, and a large sum of money from Russia. Russia refused. Roosevelt persuaded Japan to accept half the island and forgo the cash payment. In exchange, Russia agreed to let Japan take over Russian interests in Manchuria and Korea. The successful efforts in negotiating the Treaty of Portsmouth won Roosevelt the 1906 Nobel Peace Prize.

As U.S. and Japanese interests expanded in East Asia, the two nations continued diplomatic talks. In later agreements, they pledged to respect each other’s possessions and interests in East Asia and the Pacific. **A**

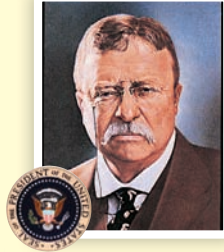
**PANAMA CANAL** By the time Roosevelt became president, many Americans, including Roosevelt, felt that the United States needed a canal cutting across Central America. Such a canal would greatly reduce travel time for commercial and military ships by providing a shortcut between the Atlantic and Pacific oceans. As early as 1850, the United States and Britain had agreed to share the rights to such a canal. In the Hay-Pauncefote Treaty of 1901, however, Britain gave the United States exclusive rights to build and control a canal through Central America.

Engineers identified two possible routes for the proposed canal. One, through Nicaragua, posed fewer obstacles because much of it crossed a large lake. The other route crossed through Panama (then a province of Colombia) and was shorter and filled with mountains and swamps. Site

selection was influenced as much by human geographic factors as physical. In the late 1800s, a French company had tried to build a canal in Panama. After ten years, the company gave up. It sent an agent, Philippe Bunau-Varilla, to Washington to convince the United States to buy its claim. In 1903, the president and Congress decided to use the Panama route and agreed to buy the French company’s route for \$40 million.

Before beginning work on the **Panama Canal**, the United States had to get permission from Colombia, which then ruled Panama. When these negotiations broke down, Bunau-Varilla helped organize a Panamanian rebellion against Colombia. On November 3, 1903, nearly a dozen U.S. warships were present as Panama declared its independence. Fifteen days later, Panama and the United

**KEY PLAYER**



**THEODORE ROOSEVELT  
1858–1919**

Rimless glasses, a bushy mustache, and prominent teeth made Roosevelt easy for cartoonists to caricature. His great enthusiasm for physical activity—boxing, tennis, swimming, horseback riding, and hunting—provided cartoonists with additional material. Some cartoons portrayed Roosevelt with the toy teddy bear that he inspired.

Roosevelt had six children, who became notorious for their rowdy antics. Their father once sent a message through the War Department, ordering them to call off their “attack” on the White House. Roosevelt thrived on the challenges of the presidency. He wrote, “I do not believe that anyone else has ever enjoyed the White House as much as I have.”

**MAIN IDEA**

**Analyzing Effects**

**A** What were the results of Roosevelt’s negotiations with the Japanese and Russians?

**A. Answer** Japan received half of Sakhalin Island but no cash payment. Russia agreed to let Japan take over Russian interests in Manchuria and Korea. In future years, the U.S. and Japan continued diplomatic talks. Roosevelt won the 1906 Nobel Peace Prize.

**ACTIVITY**

**LINK TO GEOGRAPHY**



**BLOCK SCHEDULING**

**Examining the Canal Routes**

**Class Time** 30 minutes

**Task** Examining the two possible canal routes to determine their geographic advantages and disadvantages

**Purpose** To help students better understand how geography plays a role in decisions and events in history

**Directions** Have students work in pairs to analyze the proposed routes for a canal. They should research each region and examine a physical map of Central America.

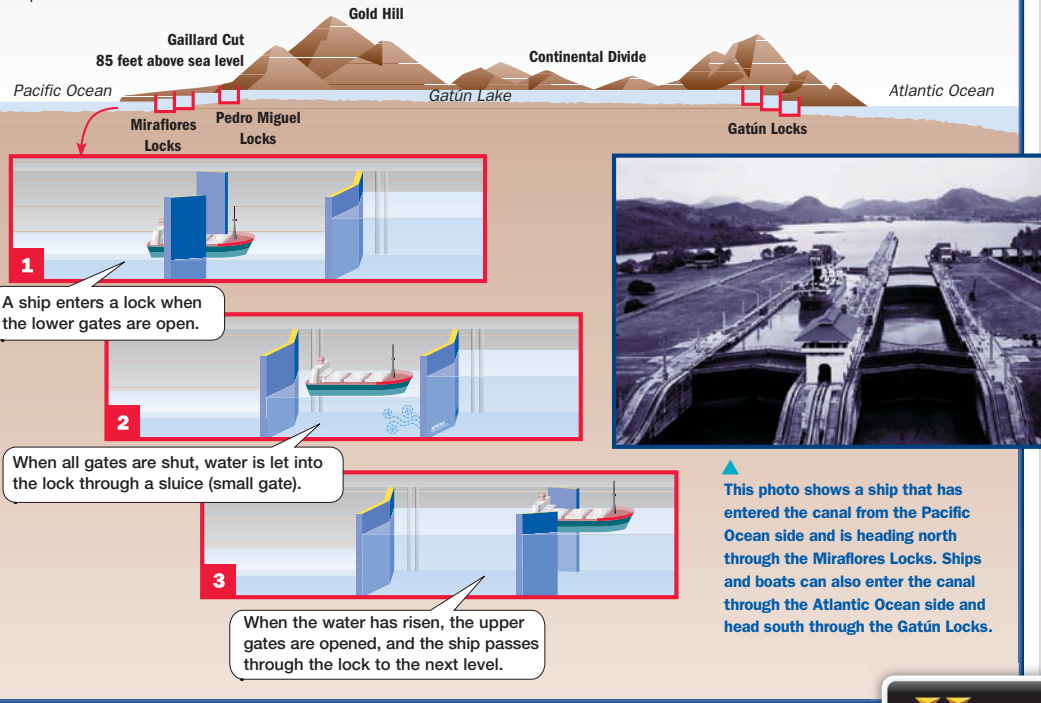
Have students make a chart like the one below that lists the advantages and disadvantages of each route.

Possible Canal Route	Advantages	Disadvantages
Nicaragua		
Panama		

Science & Technology

THE PANAMA CANAL

Locks are used to raise and lower ships a total of 170 feet during the 51-mile trip through the Panama Canal. For example, ships from the Atlantic Ocean are lifted by the Gatún Locks to the level of Gatún Lake. The ships cross the human-made lake, then move through another waterway, the Gaillard Cut. The Pedro Miguel and Miraflores locks then lower the ships to the level of the Pacific Ocean.



This photo shows a ship that has entered the canal from the Pacific Ocean side and is heading north through the Miraflores Locks. Ships and boats can also enter the canal through the Atlantic Ocean side and head south through the Gatún Locks.

**B. Answer** Builders fought diseases and the difficult removal of soft volcanic soil. They also had to clear brush and drain swamps.

MAIN IDEA

Identifying Problems

**B** What problems did canal workers encounter in constructing the canal?

States signed a treaty in which the United States agreed to pay Panama \$10 million plus an annual rent of \$250,000 for an area of land across Panama, called the Canal Zone. The payments were to begin in 1913.

**CONSTRUCTING THE CANAL** Due to the challenging physical geography its builders faced, construction of the Panama Canal ranks as one of the world's greatest engineering feats. Builders fought diseases, such as yellow fever and malaria, and soft volcanic soil that proved difficult to remove. Work clearing brush and draining swamps began in 1904. By 1913, the height of construction, more than 43,400 workers were employed. Some had come from Italy and Spain; three-quarters were blacks from the British West Indies. More than 5,600 workers died from accidents or disease. The total cost to the United States was about \$380 million. **B**

On August 15, 1914, the canal opened for business, and more than 1,000 merchant ships passed through during its first year. U.S.-Latin American relations, however, had been damaged by American support of the rebellion in Panama. The resulting ill will lasted for decades, despite Congress's paying Colombia \$25 million in 1921 to compensate the country for its lost territory.

**HISTORY**  
**VIDEO**  
 Panama Canal: Locks  
[hmhsocialstudies.com](http://hmhsocialstudies.com)

Science & Technology

Point out to students that the Atlantic Ocean and Pacific Ocean are not at the same level, making the locks necessary. The lock chambers are 1,000 feet long, 110 feet wide, and 41 feet deep. Many of today's large oceangoing ships are too large for the locks. Ask students if they think the canal has outlived its usefulness. (Students may respond that there are still many vessels that use the canal.)

**In-Depth Resources: Unit 3**  
 · Geography Application, pp. 34-35

Connections Across Time

1903 AND 1977

The Panama Canal

In an effort to improve relations with Panama and the rest of Latin America, the United States signed a treaty with the Panamanians in 1977 that handed them control of the Panama Canal on December 31, 1999. In 1978, the U.S. Senate ratified the agreement by a vote of 68 to 32, just one more than the two-thirds majority required by the U.S. Constitution.

ACTIVITY LINK TO SCIENCE

Tropical Diseases

**Class Time** 45 minutes

**Task** Researching the efforts to eliminate malaria and yellow fever in the Canal Zone

**Purpose** To explain one of the many challenges the United States faced in constructing the Panama Canal



**Directions** Divide the class into small groups. Have one half of the groups research the efforts to end yellow fever in the Canal Zone and the other half research the efforts to end malaria there. Students should create posters showing the cause of the diseases, how they are spread, the number of workers who died from them, and how they are prevented.

**Integrated Assessment**  
 · Rubrics 1, 4

Analyzing Political Cartoons

SKILLBUILDER ANSWERS

- Roosevelt is portrayed as a giant carrying a gigantic stick. The contrast between his size and the size of the other people suggests his exaggerated power.
- “The World Constable” is a good title because Roosevelt is acting as a policeman, separating Europe and Latin America.

-  Geography Transparencies GT18  
· United States Intervenes in Latin America
-  Critical Thinking Transparencies CT52  
· U.S. Trade with Central America

Analyzing Political Cartoons

“THE WORLD’S CONSTABLE”

This cartoon, drawn by Louis Dalrymple in 1905, shows Teddy Roosevelt implementing his new world diplomacy. The cartoon implies that Roosevelt has the right to execute police power to keep the countries of Europe (shown on the right) out of the affairs of Latin American countries (shown on the left).

SKILLBUILDER  
Analyzing Political Cartoons

- How does the cartoonist portray President Roosevelt?
- Why is “The World’s Constable” a good title for this cartoon?



**THE ROOSEVELT COROLLARY** Financial factors drew the United States further into Latin American affairs. In the late 19th century, many Latin American nations had borrowed huge sums from European banks to build railroads and develop industries. Roosevelt feared that if these nations defaulted on their loans, Europeans might intervene. He was determined to make the United States the predominant power in the Caribbean and Central America.

Roosevelt reminded European powers of the Monroe Doctrine, which had been issued in 1823 by President James Monroe. The Monroe Doctrine demanded that European countries stay out of the affairs of Latin American nations. Roosevelt based his Latin America policy on a West African proverb that said, “Speak softly and carry a big stick.” In his December 1904 message to Congress, Roosevelt added the **Roosevelt Corollary** to the Monroe Doctrine. He warned that disorder in Latin America might “force the United States . . . to the exercise of an international police power.” In effect, the corollary said that the United States would now use force to protect its economic interests in Latin America.

**Vocabulary corollary:** an additional statement that follows logically from the first one

**DOLLAR DIPLOMACY** During the next decade, the United States exercised its police power on several occasions. For example, when a 1911 rebellion in Nicaragua left the nation near bankruptcy, President William H. Taft, Roosevelt’s successor, arranged for American bankers to loan Nicaragua enough money to pay its debts. In return, the bankers were given the right to recover their money by collecting Nicaragua’s customs duties. The U.S. bankers also gained control of Nicaragua’s state-owned railroad system and its national bank. When Nicaraguan citizens heard about this deal, they revolted against President Adolfo Díaz. To prop up



“Speak softly and carry a big stick; you will go far.”

THEODORE ROOSEVELT

Connections Across Time

1911 AND 1986

The Iran-Contra Affair

The Iran-Contra Affair was a scandal that involved the covert sale of arms to Iran for the possible release of American hostages being held in Lebanon. It also involved the use of the profits from the \$48 million in arms sales to aid the Nicaraguan non-Communist rebels, known as the Contras, in their fight against the Marxist Sandinista government. Both actions were in direct violation of U.S. laws. Months of legal and congressional investigations into the matter led to the prosecution of several top officials in the Reagan administration.

ACTIVITY LINK TO GOVERNMENT/CIVICS


Intervention Abroad

**Class Time** Two class periods

**Task** Describing U.S. intervention and its effects

**Purpose** To understand the intended goal and the effects of U.S. intervention in Latin America

**Directions** Have students choose one of the following countries: the Dominican Republic, Haiti, Cuba, Nicaragua, Mexico. They should research the reasons for U.S. intervention in the country they selected, the dates of the interventions, the form of the intervention, and its effects. Students should present their findings in a brief written report.

 Integrated Assessment  
· Rubrics 1, 5

Díaz's government, some 2,000 marines were sent to Nicaragua. The revolt was put down, but some marine detachments remained in the country until 1933.


The Taft administration followed the policy of using the U.S. government to guarantee loans made to foreign countries by American businesspeople. This policy was called **dollar diplomacy** by its critics and was often used to justify keeping European powers out of the Caribbean.

## Woodrow Wilson's Missionary Diplomacy 2

The Monroe Doctrine, issued by President James Monroe in 1823, had warned other nations against expanding their influence in Latin America. The Roosevelt Corollary asserted, in 1904, that the United States had a right to exercise international police power in the Western Hemisphere. In 1913, President Woodrow Wilson gave the Monroe Doctrine a moral tone.

According to Wilson's "missionary diplomacy," the United States had a moral responsibility to deny recognition to any Latin American government it viewed as oppressive, undemocratic, or hostile to U.S. interests. Prior to this policy, the United States recognized any government that controlled a nation, regardless of that nation's policies or how it had come to power. Wilson's policy pressured nations in the Western Hemisphere to establish democratic governments. Almost immediately, the Mexican Revolution put Wilson's policy to the test.

**THE MEXICAN REVOLUTION** Mexico had been ruled for more than three decades by a military dictator, Porfirio Díaz. A friend of the United States, Díaz had long encouraged foreign investments in his country. As a result, foreigners, mostly Americans, owned a large share of Mexican oil wells, mines, railroads, and ranches. While foreign investors and some Mexican landowners and politicians had grown rich, the common people of the country were desperately poor.


In 1911, Mexican peasants and workers led by Francisco Madero overthrew Díaz. Madero promised democratic reforms, but he proved unable to satisfy the conflicting demands of landowners, peasants, factory workers, and the urban middle class. After two years, General Victoriano Huerta took over the government. Within days Madero was murdered. Wilson refused to recognize the government that Huerta formed. He called it "a government of butchers." 

**INTERVENTION IN MEXICO** Wilson adopted a plan of "watchful waiting," looking for an opportunity to act against Huerta. The opportunity came in April 1914, when one of Huerta's officers arrested a small group of American sailors in Tampico, on Mexico's eastern shore. The Mexicans quickly released them and apologized, but Wilson used the incident as an excuse to intervene in Mexico and ordered U.S. Marines to occupy Veracruz, an important Mexican port. Eighteen Americans and at least 200 Mexicans died during the invasion.

The incident brought the United States and Mexico close to war. Argentina, Brazil, and Chile stepped in to mediate the conflict. They proposed that Huerta step down and that U.S. troops withdraw without paying Mexico for damages. Mexico rejected the plan, and Wilson refused to recognize a government that had come to power as a result of violence. The Huerta regime soon collapsed, however, and Venustiano Carranza, a nationalist leader, became president in 1915. Wilson withdrew the troops and formally recognized the Carranza government.

### MAIN IDEA

#### Analyzing Motives

 Why did President Wilson refuse to recognize Huerta's government?

**C. Answer** Wilson was following his policy of missionary diplomacy. He considered Huerta a murderer because Huerta had ordered rebel leader Francisco Madero executed.



#### VIDEO

The Peasant Revolution

 hmsocialstudies.com

### ANOTHER PERSPECTIVE

#### INTERVENTION IN MEXICO

Most U.S. citizens supported American intervention in Mexico. Edith O'Shaughnessy, wife of an American diplomat in Mexico City, had another perspective. After touring Veracruz, O'Shaughnessy wrote to her mother:


"I think we have done a great wrong to these people; instead of cutting out the sores with a clean, strong knife of war . . . and occupation, . . . we have only put our fingers in each festering wound and inflamed it further."

*America Claims an Empire* 363

## Instruct: Objective 2

### Woodrow Wilson's Missionary Diplomacy

- What was Woodrow Wilson's "missionary diplomacy"?
- Why did the United States become involved in the affairs of Mexico?

 In-Depth Resources: Unit 3  
• Guided Reading, p. 27

## ANOTHER PERSPECTIVE

### Intervention in Mexico

Edith O'Shaughnessy wrote numerous letters from Mexico, which eventually were published in two books, *A Diplomat's Wife in Mexico* (1916) and *Diplomatic Days* (1917). She went on to publish other books, including two works of fiction. One of them, *Viennese Medley* (1924), about life in Vienna after World War I, was made into a movie.

**Evaluating** Why do you think Edith O'Shaughnessy's opinion might be more valid than that of others? (*Because she was an eyewitness to the effects of U.S. intervention in Mexico*)

## ACTIVITY COOPERATIVE LEARNING


### Debating Wilson's Missionary Diplomacy 3E, 3G

**Class Time** 45 minutes

**Task** Debating whether the United States is within its right to try to impose its morals and beliefs on other nations and cultures

**Purpose** To discuss what role morality and human rights play in foreign affairs

**Directions** Divide the class into pairs. Assign one half of the class to develop arguments for "missionary diplomacy" and the other half to develop arguments against the philosophy. Students can research Wilson's involvement in Mexico or investigate more recent situations. When students have developed their arguments, match pairs with opposite views to debate their positions. Encourage ELLs to practice expressing their opinions through short words and phrases as they prepare for the debate.

 Integrated Assessment  
• Rubric 3



## BLOCK SCHEDULING

History Through Art

José Orozco started to paint after losing his left hand in a laboratory accident. His early efforts included political cartoons and a series on the slums of Mexico City. Orozco fled Mexico in 1917 and returned in 1920. Orozco decorated some of Mexico's public buildings with murals that highlighted patriotic and revolutionary themes. During the 1930s, Orozco worked with fellow muralist Diego Rivera and others to bring about a period of artistic achievement in Mexico known as the Mexican Renaissance.

*(The painter shows unity by compressing many bodies, all with the same outline, shape, and body direction—moving forward,—into the painting. The bold landscape and striking colors show strength.)*

History Through

Art

ZAPATISTAS (1931)

José Orozco, one of Mexico's foremost artists, painted these Zapatistas (followers of Zapata), to honor the peasant men and women who fought in the Mexican revolution. Orozco did many paintings in support of the revolution.

**What aspects of the image does the artist use to convey strength and unity?**



Connections Across Time

1910 AND TODAY

Zapatista National Liberation Army

A rebel group bearing the name of Emiliano Zapata—and espousing his doctrine of land reform and greater rights for the poor—announced its presence on New Year's Day 1994. It seized several towns in Mexico's poverty-stricken state of Chiapas and demanded social and economic reforms for the country's native peoples. A two-week clash with authorities followed, and nearly 150 people were killed. Since then, the government and rebels have tried to reach an agreement acceptable to both sides. Long negotiations between the government and the rebels followed, but dialogue broke down soon after the signing of the San Andrés Accords in 1996. In 2006, the Zapatistas launched a nationwide political tour ahead of the presidential elections.

**REBELLION IN MEXICO** Carranza was in charge, but like others before him, he did not have the support of all Mexicans. Rebels under the leadership of **Francisco "Pancho" Villa** (vē'ə) and **Emiliano Zapata** (ē-mēl-yā' nō zə-pā'tə) opposed Carranza's provisional government. Zapata—son of a mestizo peasant—was dedicated to land reform. "It is better to die on your feet than live on your knees," Zapata told the peasants who joined him. Villa, a fierce nationalist, had frequently courted the support and aid of the United States.

A PERSONAL VOICE PANCHO VILLA

"[A]s long as I have anything to do with the affairs in Mexico there will be no further friction between my country and my friends of the North . . . To President Wilson, the greatest American, I stand pledged to do what I can to keep the faith he has in my people, and if there is anything he may wish I will gladly do it, for I know it will be for the good of my country."

—New York Times, January 11, 1915

Despite Villa's talk of friendship, when President Wilson recognized Carranza's government, Villa threatened reprisals against the United States. In January 1916, Carranza invited American engineers to operate mines in northern Mexico. Before they reached the mines, however, Villa's men took the Americans off a train and shot them. Two months later, some of Villa's followers raided Columbus, New Mexico, and killed 17 Americans. Americans held Villa responsible.

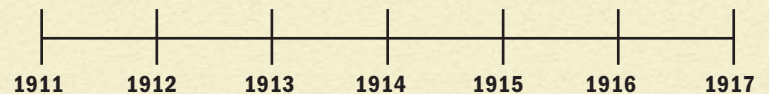
**CHASING VILLA** With the American public demanding revenge, President Wilson ordered Brigadier General **John J. Pershing** and an expeditionary force of about 15,000 soldiers into Mexico to capture Villa dead or alive. For almost a year, Villa eluded Pershing's forces. Wilson then called out 150,000 National Guardsmen and stationed them along the Mexican border. In the meantime,

DIFFERENTIATING INSTRUCTION

LESS PROFICIENT READERS

Creating a Time Line **ELPS** 4D, 4F

Help students keep track of the events related to the Mexican Revolution and United States intervention in Mexico by creating a time line like the one shown here. Begin with the date 1911 and end with 1917. As students read, have them note different years in which events take place. Then have them transfer the information from their reading to the time line. Under each date, list the key events that happened that year. Have students compare their time lines with those of their classmates.



Mexicans grew angrier over the U.S. invasion of their land. In June 1916, U.S. troops clashed with Carranza's army, resulting in deaths on both sides.

Carranza demanded the withdrawal of U.S. troops, but Wilson refused. War seemed imminent. However, in the end, both sides backed down. The United States, facing war in Europe, needed peace on its southern border. In February 1917, Wilson ordered Pershing to return home. Later that year, Mexico adopted a constitution that gave the government control of the nation's oil and mineral resources and placed strict regulations on foreign investors.

Although Carranza had called for the constitution of 1917, he failed to carry out its measures. Instead, he ruled oppressively until 1920 when a moderate named Alvaro Obregón came to power. Obregón's presidency marked the end of civil war and the beginning of reform.

U.S. intervention in Mexican affairs provided a clear model of American imperialist attitudes in the early years of the 20th century. Americans believed in the superiority of free-enterprise democracy, and the American government attempted to extend the reach of this economic and political system, even through armed intervention.

The United States pursued and achieved several foreign policy goals in the early 20th century. First, it expanded its access to foreign markets in order to ensure the continued growth of the domestic economy. Second, the United States built a modern navy to protect its interests abroad. Third, the United States exercised its international police power to ensure dominance in Latin America.



▲ Pancho Villa directs a column of his troops through northern Mexico in 1914.

More About . . .

**U.S. Intervention in Mexico**

The June 1916 clash between U.S. and Mexican forces that so enraged Carranza and pushed the two countries to the edge of war occurred near the town of Carrizal. It resulted in the deaths of nine Americans and 30 Mexicans. In the wake of the battle, Wilson mobilized 150,000 National Guardsmen and stationed them along the Mexican border. The massing of troops was the largest concentration of American forces since the Civil War.

**Assess & Reteach**

**SECTION 4 ASSESSMENT**

Assign pairs of students to help each other answer the questions.

- 📄 Formal Assessment
- Section Quiz, p. 196

**SELF-ASSESSMENT**

Have students write their impressions of Roosevelt and Wilson's foreign policy in two brief paragraphs.

**RETEACH**

Have several students read their answers to question 4 before the class, making sure both opinions are expressed. Then have them discuss further the arguments for and against U.S. involvement in Latin America.

- 📄 In-Depth Resources: Unit 3
- Reteaching Activity, p. 33

SECTION 4

ASSESSMENT

**1. TERMS & NAMES** For each term or name below, write a sentence explaining its significance.

- Panama Canal
- dollar diplomacy
- Emiliano Zapata
- Roosevelt Corollary
- Francisco "Pancho" Villa
- John J. Pershing

**SUMMARIZING**

**2. USING YOUR NOTES**

In a two-column chart, list ways Teddy Roosevelt and Woodrow Wilson used American power around the world during their presidencies.

Using American Power	
Roosevelt	Wilson

Choose one example and discuss its impact with your classmates.

**CRITICAL THINKING**

**3. COMPARING AND CONTRASTING**

What do you think were the similarities and differences between Roosevelt's Big Stick policy and Wilson's missionary diplomacy? Use evidence from the text to support your response. **Think About:**

- the goal of each of these foreign policies
- how the policies defined the role of U.S. intervention in international affairs
- how the policies were applied

**4. EVALUATING DECISIONS**

In your opinion, should the United States have become involved in the affairs of Colombia, Nicaragua, and Mexico during the early 1900s? Support your answer with details. **Think About:**

- the effect of the Roosevelt Corollary
- the results of dollar diplomacy
- the implication of Wilson's missionary diplomacy

Answers ASSESSMENT

SECTION 4

**1. TERMS & NAMES**

- Panama Canal, p. 360
- Roosevelt Corollary, p. 362
- dollar diplomacy, p. 363
- Francisco "Pancho" Villa, p. 364
- Emiliano Zapata, p. 364
- John J. Pershing, p. 364

**2. USING YOUR NOTES**

**Roosevelt:** helped mediate the settlement in Russo-Japanese War; launched construction of Panama Canal; formulated the Roosevelt Corollary to the Monroe Doctrine  
**Wilson:** formulated "missionary diplomacy"; ordered U.S. military occupation of Veracruz; sent General Pershing and expeditionary forces to pursue Pancho Villa in Mexico

**3. COMPARING AND CONTRASTING**

Both were foreign policies that broadened the Monroe Doctrine and addressed potentially dangerous situations in Latin America. "Big stick" policy cast the United States in the role of international police officer and had an economic focus. "Missionary diplomacy" cast the United States in the role of judge and had a moral tone.

**4. EVALUATING DECISIONS**

**Yes**—The Roosevelt Corollary justified intervention; the United States needed to protect its various economic interests in Latin America; and the United States felt morally bound to protect democracy in Latin America. **No**—The U.S. belief in its own superiority led to the use of excessive military forces against those countries. They had the right to choose their own governments.

GEOGRAPHY  
SPOTLIGHT

## Objectives

- To summarize the development of the Panama Canal
- To identify the benefits of building the canal

## Focus &amp; Motivate

**Developing Historical Perspective** Have students imagine that they are workers on the Panama Canal and discuss what personal qualities they would need to possess to see them through the job. (*Patience, physical strength, the ability to work as part of a team*)

## More About . . .

## The Panama Canal

In 1882, the French tried to carve out a canal through Panama. Heading up the project was Ferdinand Marie De Lesseps. He had directed the construction of Egypt's Suez Canal—which opened in 1869. The Panama endeavor quickly ran into problems. A group of dishonest politicians, who supported De Lesseps, stole large amounts of money from the canal company. Also, French engineers lacked the proper tools to complete the huge digging project. In addition, scientists did not yet know how to combat the region's deadly diseases. De Lessep's company went bankrupt in 1889 and shortly thereafter abandoned the canal project.

## GEOGRAPHY SPOTLIGHT

The Panama Canal:  
Funnel for Trade

By the late 19th century, the U.S. position in global trade was firmly established. A glance at a world map during that time revealed the trade advantages of cutting through the world's great landmasses at two strategic points. The first cut, through the Isthmus of Suez in Egypt, was completed in 1869 and was a spectacular success. A second cut, this one through Panama, in Central America, would be especially advantageous to the United States. Such a cut, or canal, would substantially reduce the sailing time between the nation's Atlantic and Pacific ports.

It took the United States ten years, from 1904 to 1914, to build the Panama Canal. By 1999, more than 700,000 vessels, flying the flags of about 70 nations, had passed through its locks. On December 31, 1999, Panama assumed full control of the canal.



## INTERCOASTAL TRADE

The first boat through the canal heralded the arrival of increased trade between the Atlantic and Pacific ports of the United States.



366 CHAPTER 10

## RECOMMENDED RESOURCES

## BOOKS

Chidsey, Donald Barr. *The Panama Canal*. New York: Crown, 1970. An informal history.

Fast, Howard. *Goethals and the Panama Canal*. New York: Julian Messner, 1942. A popular account of George Washington Goethals, the canal's builder.

McCullough, David G. *The Path Between the Seas*. New York: Simon and Schuster, 1977. A well-known account of the creation of the canal.

Snapp, Jeremy S. *Destiny by Design: The Construction of the Panama Canal*. Pacific Heritage Press, 2000. Photo essay and narrative of the building of the canal.

## VIDEOS

*A Man, A Plan, A Canal: Panama*. Coronet, 1988. A history of the canal and its construction, produced with Boston PBS channel WGBH.

*Americans Build the Panama Canal*. Agency for Instructional Technology (AIT), 1991. Construction of the canal from 1901 to 1914.

*Panama Canal*. A&E Home Video, 1994. A historical documentary in the Modern Marvels series.

## SOFTWARE

*Who Built America? Voyager*. Teddy Roosevelt digging the Panama Canal is among the ample historical video, audio, images, and documents in this program for grades 10–12.



### OCEANGOING VESSELS

Ships, like this one, must be of a certain dimension in order to fit through the canal's locks. These container ships must be no more than 106 feet across and 965 feet in length, with a draft (the depth of the vessel below the water line when fully loaded) of no more than 39.5 feet. Each ship pays a toll based on its size, its cargo, and the number of passengers it carries.

### NEW YORK CITY

New York City and other U.S. Atlantic ports accounted for about 60 percent of the traffic using the Panama Canal in the early decades of its existence.



### NEW ORLEANS

Since its founding in 1718, New Orleans has served as a major port for the products of the areas along the Mississippi River. In 1914, the Panama Canal brought Pacific markets into its orbit.

### THINKING CRITICALLY

- Analyzing Patterns** On a world map, identify the route that ships took to get from New York City to San Francisco before the Panama Canal opened. How did this route change after the opening of the canal?
- Creating a Model** Use clay to shape a model of a cross-section of the Panama Canal as shown in the Science and Technology feature on page 361. For the locks, use styrofoam blocks or pieces of wood which you have glued together. Paint the model, and then label each part of the canal.

[hmhsocialstudies.com](http://hmhsocialstudies.com) RESEARCH WEB LINKS

*America Claims an Empire* 367

## Instruct

- How long did it take to complete construction of the Panama Canal?
- What are the dimension restrictions on ships passing through the canal?
- How did the Panama Canal enhance world trade and America's role in it?

### MAKING PERSONAL CONNECTIONS

Ask students to think about what types of goods would be shipped through the canal. (*bulky items, oil, grain, and cargo containers*) Ask what would happen to the price of these goods if it took longer to ship them to the part of the country where the students live. (*Prices would increase.*)

## HISTORY from VISUALS

### Interpreting the Images

Have students examine the main map and then briefly identify routes from other continents that could probably have been included. (*A route from Europe or Africa through the canal to the west coast of North America and vice versa; a route from Europe or Africa through the canal to Asia and vice versa; a route from the east coast of South America through the canal to the west coast of North America or Asia and vice versa*)

## THINKING CRITICALLY: ANSWERS

### ANALYZING PATTERNS

Ships leaving New York City would have to make the roughly 13,000-mile-trip around the continents of South America in order to reach San Francisco. The route was considerably shortened by passage through the canal.

### CREATING A MODEL

#### Rubric

A model should . . .

- demonstrate in-depth understanding of the mechanics of a lock system
- clearly represent the concepts of a lock system in a three-dimensional manner
- exhibit grade level artistic skill



**TERMS & NAMES**

1. Queen Liliuokalani, p. 342
2. imperialism, p. 342
3. José Martí, p. 347
4. yellow journalism, p. 347
5. USS *Maine*, p. 348
6. protectorate, p. 354
7. Open Door notes, p. 356
8. Boxer Rebellion, p. 357
9. Panama Canal, p. 360
10. Roosevelt Corollary, p. 362

**MAIN IDEAS**

1. Economic competition; political and military competition; a belief in the racial and cultural superiority of Anglo-Saxons
2. She wanted to preserve Hawaii for Hawaiians, while American imperialists wanted to annex the islands.
3. U.S. businessmen sided with Spain because they wanted to protect their investments. The Americans, however, sympathized with the Cuban demand for independence.
4. Territorial gains as a result of the war gave the U.S. strategic economic and military value and boosted the economy.
5. Puerto Rico was strategically important to the United States as a way to assert its presence in the Caribbean and as a base for protecting a possible canal through the Isthmus of Panama.
6. The Boxers staged a revolt to expel foreigners from China. In August 1900, troops from Britain, France, Germany, Japan, and the United States marched on the Chinese capital. The international force put an end to the rebellion.
7. U.S. economy's dependence on exports to ensure growth; U.S. right to intervene abroad to keep foreign markets open; closing an area to American products threatened U.S. survival
8. A dispute over Korea
9. Geographic factors such as swamps, brush, and volcanic soil made construction challenging. Human factors such as France selling a claim to the land and needing to get permission from Colombia affected site selection.

**VISUAL SUMMARY**

**AMERICA CLAIMS AN EMPIRE**

**CAUSES**

- Economic competition among industrial nations
- Political and military competition, including the creation of a strong naval force
- A belief in Anglo-Saxon superiority

**AMERICAN IMPERIALISM**



**EFFECTS**

- The U.S. purchased Alaska in 1867.
- The U.S. annexed Hawaii in 1898.
- In 1898, the U.S. helped Cuba win independence from Spain.
- In the Treaty of Paris, the U.S. gained Puerto Rico, Guam, and the Philippine Islands.
- Following the Spanish-American War, the U.S.
  - reorganized the government of Puerto Rico
  - established a protectorate over Cuba
  - crushed a revolt in Philippines
- In 1899, the Open Door policy established U.S. trading rights in China.
- In the early 1900s, President Roosevelt initiated plans for the Panama Canal and asserted the right of the U.S. to exercise police power in the Western Hemisphere.
- President Wilson pressured Mexico and other countries in the Western Hemisphere to establish democratic governments.

**TERMS & NAMES**

For each term or name below, write a sentence explaining its significance to U.S. foreign policy between 1890 and 1920.

- |                        |                         |
|------------------------|-------------------------|
| 1. Queen Liliuokalani  | 6. protectorate         |
| 2. imperialism         | 7. Open Door notes      |
| 3. José Martí          | 8. Boxer Rebellion      |
| 4. yellow journalism   | 9. Panama Canal         |
| 5. U.S.S. <i>Maine</i> | 10. Roosevelt Corollary |

**MAIN IDEAS**

Use your notes and the information in the chapter to answer the following questions.

**Imperialism and America** (pages 342–345)

1. What three factors spurred American imperialism?
2. How did Queen Liliuokalani's main goal conflict with American imperialists' goals?

**The Spanish-American War** (pages 346–351)

3. Why was American opinion about Cuban independence divided?
4. How did the Spanish-American War affect the U.S. economy?

**Acquiring New Lands** (pages 352–358)

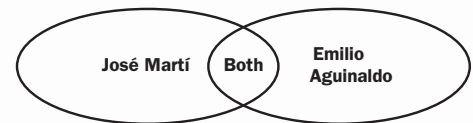
5. Why was the U.S. interested in events in Puerto Rico?
6. What led to the Boxer Rebellion and how did it end?
7. What three key beliefs about America's industrial capitalist economy were reflected in the Open Door policy?

**America as a World Power** (pages 359–365)

8. What conflict triggered the war between Russia and Japan?
9. Analyze the impact of human and physical geographic factors on the Panama Canal.

**CRITICAL THINKING**

1. **USING YOUR NOTES** Create a Venn diagram like the one below to show the similarities and differences between José Martí of Cuba and Emilio Aguinaldo of the Philippines.



2. **HYPOTHESIZING** Would Cuba have won its independence in the late 19th century if the United States had not intervened there? Support your opinion with details from the text.
3. **INTERPRETING MAPS** Look carefully at the Caribbean map on page 349 and the world map on page 356. Why do you think American naval bases in the Caribbean and the Pacific were beneficial to the United States?
4. **EXPLAINING TURNING POINTS** What is the significance of the year 1898 as a turning point in American history? Explain.

**CRITICAL THINKING**

1. **Using Your Notes** **Martí**—Cuba; lived in exile in New York; worked as journalist and poet; died fighting for Cuban independence in 1895; revered today as a hero  
**Both**—Born in former Spanish colony; feared American domination; political activist and rebel leader; fought for independence and used guerrilla tactics  
**Aguinaldo**—Philippines; pro-claimed the Philippines an independent republic; February 1899, led a Filipino armed revolt;
2. **Hypothesizing** Spain might have kept Cuba from achieving independence at first, but since Cuba had a history of rebellion, it probably would have won independence eventually.
3. **Interpreting Maps** Cuba's proximity to Florida helped the U.S. defend its coast; bases on Pacific islands aid the U.S. defensive and offensive military positions, provide stops for trading ships, and spread U.S. influence.
4. **Explaining Turning Points** In 1898, the U.S. fought the Spanish-American War and gained Puerto Rico, Guam, and the Philippine Islands.

Use the cartoon and your knowledge of U.S. history to answer question 1.



1. What is the cartoonist's point of view concerning the relationship between the United States and Cuba?
  - A The United States wishes to be friends with Cuba.
  - B The United States will devour Cuba.
  - C The United States is wasting its time fighting over such a small area.
  - D The United States has no interest in Cuba.

Use the map and your knowledge of U.S. history to answer question 2.



2. How did the building of the Panama Canal support United States efforts to become a world power?
  - F It gave the United States a colony in Central America.
  - G It prevented Japan and China from attacking Hawaii.
  - H It opened up a new avenue for trade with China.
  - J By providing a shortcut between the Atlantic Ocean and Pacific Ocean, it opened up new trading opportunities.

[hmhsocialstudies.com](http://hmhsocialstudies.com) TEST PRACTICE

For additional test practice, go online for:

- Diagnostic tests
- Tutorials

INTERACT WITH HISTORY

myWriteSmart

Recall the issues that you recorded in *myNotebook* as you read the chapter. Suppose you are a journalist at the end of the Spanish-American War. You work for William Randolph Hearst's *New York Journal*. Write a newspaper editorial that presents your point of view about whether or not the Senate should ratify the Treaty of Paris, thus annexing the Philippines. Use *myWriteSmart* in your eBook to write your editorial.

FOCUS ON WRITING

myWriteSmart

Imagine you are a worker on the Panama Canal. Write a diary entry giving details about the work you are doing, the hardships you face, and why you think the project is worthwhile. Use *myWriteSmart* in your eBook to write your diary entry.

MULTIMEDIA ACTIVITY



In the late 1800s and early 1900s, a policy of expansionism led the United States to acquire new territories. How did these acquisitions affect the United States into the position of a world power? Do you think the United States was right to pursue such a policy? Use Internet resources to research opinions on expansionism between 1895 and 1920. Choose a document that reflects your point of view. Then use the document to help you write a speech that specifies and explains that point of view. Provide details to make your arguments clear and convincing while also addressing opposing concerns. Present your speech to the class.

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INTERACT WITH HISTORY

myWriteSmart

Rubric

The editorial should . . .

- clearly state a position on the annexation of the Philippines
- present both sides of the issue and then strategically refute the counterargument with facts
- demonstrate in-depth understanding of the issues surrounding the annexation of the Philippines

FOCUS ON WRITING

myWriteSmart

Rubric

The diary entry should . . .

- be lively and informative
- provide details about life on the Panama Canal project
- use vivid and engaging language

MULTIMEDIA ACTIVITY

Rubric

The speech should . . .

- support an opinion for or against America's policy toward imperialism and expansionism
- discuss acquisition of new territories
- detail significant events, policies, and individuals that moved the United States into a position of world power

TEXAS TEST PRACTICE

1. The correct answer is letter B. Point out to students that the cartoonist has portrayed the United States as the head of Uncle Sam. The expression is menacing. None of the other answers involve a menacing attitude.
2. The correct answer is letter J. Building the canal allowed the United States more access to trade with Asia. The letter F is not correct because the Canal Zone technically was not considered a colony. The letter G is not correct because the canal would not have an impact on the ability of China or Japan to attack Hawaii. The letter H is not correct because trade included more than just China.

UNIT PROJECT

ERAS AND CHARACTERISTICS WEBPAGES

The Unit Project is introduced on page 302 of the student text.

Tips for Teaching

- Have students review pages 194-197 to determine that this chapter's content fits within the "Progressive Era and American Expansionism" era.
- Redirect students' attention to pages 192-193 and encourage students to review the chapter with these characteristics in mind and to add appropriate characteristics and supporting materials to their webpages.



Formal Assessment

- Chapter Test, Forms A, B, and C, pp. 197-208

## END-OF-CHAPTER SKILL ACTIVITY

### Objectives

- To identify primary and secondary sources
- To use primary and secondary sources to acquire information
- To analyze primary and secondary sources to answer historical questions

### Instruct

Share these tips with students as they read the passage.

1. You can learn more about the past by studying primary sources. As you read a source, try to find answers to the following questions: Who is it about? What is it about? Where did it happen? Why did it happen?
2. Consider the words *primary* and *secondary*. How can the meanings of these words help you remember which is created by people at an event and which is a second-hand account?
3. Primary sources are accounts given by people. Therefore, they often present a person's opinion or point of view. Secondary sources are often more objective but can still include bias. Remember to consider the author's point of view when assessing the validity of the source.

### End-of-Chapter Skill Activity

## Using Primary and Secondary Sources

### DEFINING THE SKILL

**Primary sources** are accounts written or created by people who were present at historical events, either as participants or as observers. Primary sources include letters, diaries, journals, speeches, some news articles, eyewitness accounts, government data, statutes, court opinions, and autobiographies.

**Secondary sources** are based on primary sources and are produced by people who were not present at the original events. They are written after the event occurred. They often combine information from a number of different accounts and contain an interpretation of the event. The interpretation is the historian's understanding of what actually happened and why. Secondary sources include history books, historical essays, some news articles, and biographies.

### UNDERSTANDING THE SKILL

**STRATEGY: EVALUATE THE INFORMATION IN EACH TYPE OF SOURCE** Examine a source and identify the author to determine if he or she was at the event or not. If the author was at the event, evaluate his or her credentials. How is the speaker connected to the events? What opinions, biases, assumptions, and points of view can you identify in the source? If it is a secondary source, analyze the information to see if there are details and information missing from primary sources. The following passage describes views of American expansionism in regards to the annexation of Hawaii. It is mainly a secondary source, but it quotes eyewitness accounts that are primary sources.

#### 1 Views on American Expansionism

During the late 1800s, Hawaii was swept up in American expansionism. 2 On one side, native Hawaiians were shocked by the manipulation and eventual overthrow of their monarchy. On the other side, leaders in the United States wanted more control of the economic benefits and strategic location of Hawaii. By 1893, cries of annexation led to differing attitudes about the situation.

3 After Queen Liliuokalani was overthrown, her niece, Princess Kaiulani, made a plea to President Cleveland in 1893 to restore the Hawaiian monarchy. In her plea, she wrote:

"Seventy years ago, Christian America sent over Christian men and women to give religion and civilization to Hawaii . . . Today, I a poor weak girl, with not one of my people near me, and all these Hawaiian statesmen against me, have strength to stand up for the rights of my people. Even now I can hear the wail in my heart, and it gives me strength and courage . . . the strength that the seventy millions of people who are in this free land will hear my cry, and will refuse to let their flag cover dishonor to mine."

3 At the time, John L. Stevens was U.S. minister to Hawaii. In his brief "A Plea for Annexation" within an article called "The Hawaiian Situation," Stevens described the Hawaiian monarchy as extinct and argued that it was imperative that the United States annex Hawaii. He explained his reasoning:

"A paramount reason why annexation should not be long postponed is that, if it soon takes place, the crown and government lands will be cut up and sold to American and Christian Caucasian people, thus preventing the Islands from being submerged and overrun by Asiatics, putting an end to Japanese ambitions stimulated by our strong European rival."

President Cleveland tried in vain to restore the monarchy in Hawaii. 4 Business leaders were unable to secure annexation at the time but managed to keep control of the Hawaiian government. Only five years later, Hawaii was named a U.S. territory.

369 SK1

### DIFFERENTIATING INSTRUCTION

#### Understanding Vocabulary

**ELPS** 1F, 2C, 2D, 3D, 4C, 4E

Use linguistic accommodation to help students understand the following terms and concepts. Have beginning ELLs define the terms in their primary language. Have intermediate ELLs restate the meanings. Have advanced ELLs use the words in sentences to show understanding. Have advanced high ELLs explain the terms to another student.

### STUDENTS ACQUIRING ENGLISH/ESL

#### Passage

**expansionism:** a practice of a country to expand by gaining territory or growing the economy

**native:** original

**annexation:** to add territory to an existing country or other political unit

**monarchy:** a government ruled by a monarch

**extinct:** no longer in existence

**paramount:** of the greatest importance

#### Strategy, page SK2

**encyclopedia:** a collection of reference materials about a wide range of subjects, usually arranged alphabetically

**credentials:** qualifications

- 1 **Locate sources.** The catalog in your school library or local public library lists resources alphabetically by subject, title, and author. Most of these are secondary sources but may contain copies or excerpts of primary sources. Articles in a general print or online encyclopedia such as *Encyclopedia Britannica* or *World Book* can give you an overview of a topic and usually provide references to additional sources.
- 2 **Secondary Source: Look for information collected from several sources.** This information can help provide a context for the primary source.
- 3 **Primary Source: Identify the title and author and evaluate his or her credentials.** What assumptions and biases does the author reveal? What qualifies the writer to report on the event? Here Princess Kaiulani is part of the Hawaiian monarchy and Stevens serves as minister to Hawaii.
- 4 **Secondary source: Look for information collected after the event.** A secondary source provides perspective that is typically missing in a primary source.

**STRATEGY: MAKE A CHART** Summarize information from primary and secondary sources in a chart.

Primary Source	Primary Source	Secondary Source
<b>Author:</b> Princess Kaiulani	<b>Author:</b> John L. Stevens	<b>Author:</b> history textbook
<b>Qualifications:</b> main figure in the events described	<b>Qualifications:</b> main figure in the events described	<b>Qualifications:</b> had access to multiple accounts of event
<b>Information:</b> describes how she feels about the situation, sensory observations, feeling of strength and certainty	<b>Information:</b> detailed consequences of inaction	<b>Information:</b> describes a range of points of view and information available only after event; puts events into historical perspective

## APPLYING THE SKILL

Make your own chart. Read Chapter 10, Section 3, “One American’s Story” to learn more about Luis Muñoz Rivera and Puerto Rican self-rule. Use a chart like the one above to summarize the information from the primary and secondary sources.

1. **Locating sources**  
What is the primary source you can use in this passage? What is the secondary source?
2. **Secondary source**  
What information do you think has been collected from several sources?
3. **Primary source**  
Who is the author of this quote? What are his or her credentials? What qualifies this individual to report on this event?
4. **Secondary source**  
What information was collected after the event? What does this help you learn about the historical perspective of the quotation?

369 SK2

## Applying the Skill: Answers

1. The “A Personal Voice” quotation by Luis Muñoz Rivera on page 352 is a primary source. The rest of the section is a secondary source because it was written by someone who was not there at the time.
2. Information has been collected about Puerto Rican self rule and Luis Muñoz Rivera.
3. The author is Luis Muñoz Rivera. He was a statesman and publisher. He was Puerto Rican but lived primarily in the United States.
4. Three months after the death of Luis Muñoz Rivera, Puerto Ricans were made U.S. citizens. Learning this information helps you see one possible effect of his work.

Students’ charts should reflect the information above.

## TEXAS ESSENTIAL KNOWLEDGE AND SKILLS FOR SOCIAL STUDIES

**TEKS 29A** use a variety of both primary and secondary valid sources to acquire information and to analyze and answer historical questions **29D** use the process of historical inquiry to research, interpret, and use multiple types of sources of evidence