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In Our Image: The Attempted Reshaping of the Cuban Education System by the United States Government, 1898-1912

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In Our Image: The Attempted Reshaping of the Cuban Education System

by the United States Government, 1898-1912

by

Mario J. Minichino

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
Department of Secondary Education
College of Education
University of South Florida

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Dedication

I dedicate this study *a mis dos corazones*, my wife and best friend Nona, and my daughter Cate Jane. Nona and Cate, your unquestioning love and support for me as I navigated this process has been a gift; I would not have been able to complete this work without you. I owe you both more than I can ever give. To my mother Margaret and my father Samuel, without the determination that you instilled in me to get the job done, I could not have completed this study. To my mother-in-law Jane, your positive spirit has always made me feel welcomed and loved, that support helped me get to the end of this pursuit. And finally, to my grandparents, Maria Rose Minichino and John Minichino, I carry both your names with pride. Without your determination, and spirit of adventure, I would never have had the opportunity to live in a country where the grandson of immigrants could rise to the appellation of Ph.D.; it has taken a hundred years for us to get here, but we made it.

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Abstract

During the fourteen years between 1898 and 1912, the influences imparted upon the School System of Cuba were substantial. In the period immediately following the conflict with Spain, known in the U.S. as the Spanish American War, a concerted effort was underway to annex the island of Cuba. This study was undertaken to discover what courses were introduced into the K-12 curricula following the U.S. intervention, who introduced those changes, and what, if any influence those changes brought to the culture of the island. This investigation and analysis was necessary to reinvigorate the discussion regarding the history of the Cuban education system in view of the attempted cultural change brought about by the U.S. intervention. While many actions were underway by various factions both within the U.S. government and without to ensure that the annexation would be successful, one concerted effort was undertaken through the reconstruction of Cuba's schools. Changes that were made include: coursework, textbooks, structure of schools, selection process for teachers and professors at the University of Havana, holiday schedule, and the school-day and school-year. While the language of instruction remained Spanish, the method of delivery and training of Cuban school teachers was adapted through an extended summer Normal School program in association with Harvard University and a fulltime program at the New Paltz Normal School in New York. From the results collected regarding the coursework, individuals involved, and the changes imparted upon the culture of Cuba, it appears that a concerted effort was underway to impose a U.S.-styled school system on Cuba with the intended result of annexation of the island of Cuba by acclamation of the Cuban people.

Introduction

It is better to have the favors of a lady with her consent, after judicious courtship, than to ravish her. Secretary of War Elihu Root on Cuban Annexation (February 11, 1900).

Seen from above, Cuba appears as a bright green emerald jewel, set against a blue sapphire sea, ringed with mother of pearl beaches, and hugged by cast-off flecks of green islets. Mysterious and alluring like a siren Cuba has called out to explorers for over five hundred years. Located at the confluence of the prevailing winds from the east, the sea currents from the west, and dotted with numerous natural harbors, Cuba became the natural port of entry and exit for the growing new-world holdings of the Spanish Crown (Pérez, 1995). Accompanying Cuba's nautical charms are 750 miles of rolling hills, palm-covered mountains, and sprawling savannahs, all blessed with a tropical climate and perennial trade winds. Perfectly positioned for control of the sea access to the Gulf of Mexico and the American continents, Cuba sits just 130 miles due east of Mexico's Yucatán Peninsula, 90 miles south of Florida, and 40 miles to the west of Haiti, the Spanish considered the centrally located island the "*Llave del Nuevo Mundo*" (Key to the New World) (de Arrate, 1876, p. 8). Soon, other nations began to recognize the importance of the island's location; thus began the race to determine who would control the fate of Cuba and her people.

Looking back from the beginning of the 21st century, it is difficult to imagine a Cuba that was the center of the Western Hemisphere. The Cuba of today is a combination of broken sidewalks, vintage automobiles, and unfulfilled expectations. While the education system and medical care on the island may be the envy of many Latin American countries, the intellectual

freedom, economic opportunity, and civic rights of the individual have been greatly restricted by the current government. Yet, for the better part of four centuries, Cuba was the hub of North, Central, and South American commerce, art, politics, and culture.

The physical position of the island at the conflux of trade winds and ocean currents, the vast fertile plains, and abundant resources combined to create a natural center around which all of the Spanish Crown's new-world holdings could navigate. Cuba's natural treasures had supported the financial growth and increased importance of the island over the first three hundred and fifty years following her discovery by Spain. By the late 18th century, those same treasures had attracted the attention of other emerging economies, including the small group of rebellious colonies struggling to grow on the continent to the north. While still a colony of Spain, Cuba was an opportune prize that held the covetous gaze of many North Americans. The question that floated through many Washington offices and between several United States officials during the 18th and 19th centuries was: When will we complete our natural domination over the continent of North America, and when will we annex Cuba?

U.S. presidents as far back as Thomas Jefferson saw the island as important to the future of the United States (Benjamin, 1990; Gott, 2004). This intricate dance, between Spain, Cuba, and the U.S., over the future control and ownership of the island, centered on several inter-related concepts. Expansionist factions in the U.S. saw the annexation of Cuba as a natural process and recognized the benefits of a protective ring of naval bases encircling the continent. Many inhabitants of the U.S. were interested in the commercial opportunity annexation would bring to the mainland. Crops such as sugar cane, tobacco, and coffee were important and lucrative products in the U.S. American companies envisioned Cuba as an untapped source for additional profit through sales to North American markets and the burgeoning international trade

opened up by swift transit of the Atlantic. Nationalists and proponents of the Manifest Destiny doctrine in the U.S. envisioned the annexation of Cuba as a natural process that would complete the settlement of the U.S. mainland ensuring North American dominance over the hemisphere. Still others saw Cuba as the means of expanding the influence of southern slave-holding states to counter the addition of slave-free territories of the U.S.

By the middle of the 19th century, slave holders in the southern U.S. saw Cuba as a natural counterbalance to the addition of California as a slave free state. Fearful of a revolt on the island similar to the one that swept Haiti at the end of the 18th century, U.S. investors in Cuba desired annexation as a means of expansion of the slave holding states of the southern U.S. A third reason was more insidious in nature, Cuban and U.S. interests alike were afraid of the “Africanization” of Cuba and sought further immigration of Europeans (Benjamin, 1990, p. 10).

Annexationists in Cuba had some similar and some different reasons than those in the U.S. for desiring a joining of Cuba to the United States during the middle years of the 19th century. According to Dr. Vidal Morales y Morales (1901), head of the Archives of Cuba under the U.S. occupational government, several perspectives existed on the island regarding annexation of Cuba by the United States during this time period. In several letters written by Gaspar Bentacourt Cisneros (1803 – 1866) the head of *El Consejo Cubano*, to other members of the organization and to those opposed to annexation, Cisneros writes of the common concern on the island regarding European intervention in the internal affairs of Cuba, particularly that of England. Much of this concern is due to the long relationship held between Spain and England. Cisneros concern regarding European intervention is centered on the continuation of slavery on the island to support Cuba’s sugar industry considering England’s abolition of slavery in 1833 (Morales y Morales, 1901). In addition to the economic concerns raised by Cisneros, he also

discusses the apprehension of chaos enveloping the island following a successful split from Spain as had occurred in Mexico and Columbia following their independence. In equal concern with these two issues is a further anxiety over the actions of his fellow Cubans during and following independence that he articulates in the following fragment from a letter to José Antonio Saco (1797-1879) a fellow Cuban who was opposed to annexation and supported independence for the island's people:

*En fin, Saco mio, todos buscan en la anexión la garantía, la fianza del gobierno de los Estados Unidos contra las pretensions de Europa, no menos que contra **nosotros mismos**, que mal que pese á nuestro amor propio, somos del mismo barro que los que han logrado hacerse independientes, pero no pueblos libres y felices.* (Morale y Morales, 1901, p. 180) (Author's emphasis in original)

(Finally, my Saco, all seek in the annexation the warranty, the guarantee of the government of the United States against the pretensions of Europe, not less than against ourselves, we must weigh the harm of our own love, as we are of the same clay as those who have managed to become independent, but not free and happy people.) (My translation)

While the issue of annexation as a means of defending slavery on the island for many Cubans was in common with that of some of the U.S. interests, clearly other perspectives were at hand.

Some *Criollos*, (native-born Cubans) and other Cuban land owners, in correspondence with members of *El Consejo Cubano*, argued for independence from Spain, but under the protection of Great Britain. The counter argument to this position put forth by the slave holding members of the organization was the ongoing concern of retaining the existing system that supported the Sugar industry and the flow of capital on the island. However, as early as the

mid-19th century, interests, such as those put forth by José Antonio Saco began to militate against annexation and for full independence along with freedom for the slaves in Cuba.

In the United States, proponents of Manifest Destiny saw Cuba as a natural extension of the continental U.S. and sought to rid the island of Spanish control during the late 19th century. Spurred on by the strategic concepts present in Alfred T. Mahan's *The Influence of Sea Power Upon History, 1660-1783*, (1890), U.S. Naval officers who read this work, recognized the importance of the deep harbors of Cuba and the benefits they provided for a world sea-power. Naval leaders, such as Assistant Secretary of the Navy (and future U.S. President: 1901-1909) Theodore Roosevelt (1858-1919), urged the U.S. government to annex Cuba to obtain coaling stations for the growing fleet of warships patrolling the southern coastline of the United States. In addition the U.S. government was interested in providing naval protection for the coming trans-isthmus canal (Epstein, 1987; Gott, 2004). To say that several divergent forces were interested in Cuban annexation, each for their own reasons would be an understatement.

U.S. interest in Cuba had been a part of the political, commercial, and military aspirations of the United States since this country claimed independence from the British in 1776 (Gott, 2004). United States political and commercial interests continued to be focused on this Spanish territory during the early years of the 19th century. However, it was not until the attainment of Florida by the U.S. in 1819 through the Adams-Onís treaty, that renewed aspirations for acquisition of Cuba emerged (Gott, 2004). As the middle of the 19th century passed, the question in Washington changed regarding Cuba. In many circles of the United States government, no longer was there a question of whether or not the U.S. would obtain control over the island, but when we do, how will we transform the island's inhabitants to fit into the U.S. culture?

Many transformational events that affected the construction of the U.S. population and culture were underway during the last half of the 19th century. The most important, regarding the changing culture of the country, was the rapid influx of immigrants from Southern and Eastern Europe and East Asia. Public education was in a process of reconstruction, deemed necessary to address this issue of melding divergent cultures into a new American citizen. New methods of social education were being introduced in schools such as the Hampton Institute by Thomas Jesse Jones, who would soon lead the seminal 1916 report on the social studies. In addition, practical applications of civics education were in the process of development in several U.S. cities led by Wilson Gill of the New Paltz, New York Normal School. Gill's introduction of his School City Program in New York City, and in several public schools in Philadelphia in concert with the Franklin Institute, was a lived experience of civics education, designed to inculcate the processes necessary of becoming an American citizen through practice. With the coming close of the 19th century, many forces were marshaling for an attempted annexation of Cuba including those necessary for an acculturation of the Cuban population to U.S. cultural practices.

The main purpose of my study is to examine and analyze the processes used by the United States to attempt the annexation of Cuba following the conclusion of the Spanish American War. The specific process I am interested in is the utilization of civics education and associated practices to acculturate the population of Cuba to one acceptable to the U.S. government. Since civics education is inherently a broad-based field, especially during the period under study, subjects included in citizenship or civics instruction could include: religious instruction, government studies, the examination of historical data, language instruction, and moral/ hygienic education. To ensure a broad-based approach to this study, I will include an

examination of the effect these interrelated concepts have on the reshaping of the Cuban culture in the attempt to annex the island.

The basic assumptions in my study are, prior to the Cuban war of Independence in 1895, the vast majority of Cubans recognized themselves as subjects of Spain *and* citizens of Cuba due to the preponderance of ethnic ties in the people of the island to Spain and Spanish culture. Second, factions of the U.S. government and private sector desired to annex Cuba and transform the mostly Spanish population on the island to become United States citizens. Third, the U.S. Military Government in control of the island used civics education practices in concert with major restructuring efforts of the school systems to assist in the transformation process. One final note is necessary to avoid confusion going forward in this analysis. Due to the importance of cultural identification in my study, I will use both the Cuban name for the conflict that extended from 1895 to 1898, The Cuban War for Independence, and the U.S. appellation, The Spanish American War (1898) as they relate to specific events and as presented by other authors. While these two events are not bound by the same time period, they do end concurrently and are utilized by scholars of this time period equally when speaking of the terminus of the two wars. In addition, by using these two terms to define the terminus of the conflict, I can combine, with little confusion, both U.S. and Cuban perspectives on the time period. This combination will add to the strength of the study by including differentiated perspectives to the analysis.

In order to situate myself in the thinking of this time period so as to not bring “presentism” into the analysis, I first reexamined my perspective of culture, education, civics, belonging, nationalism, and citizenship as it was present at this time period to the best of my ability. The re-acquaintance of my understanding of citizenship and civics education began with an examination of the interrelated concepts of citizenship, belonging, culture, the unique concept

of *Cubanidad* or Cubanness, acculturation, and civics education. In order to understand how culture and citizenship interact to form citizens of a country, I next examined belonging as it relates to the development of national and ethnic identity. I further built upon my understanding of identity with a review of what constitutes citizenship and how the process of civics education can be used to create citizens of a country. Next, a review of acculturation, or the teaching of social practices of a people as they relate to formal education, provided a foundation for the examination of civics education. As an important aspect of acculturation, I deviate slightly from a situational understanding of this concept to include the work of Fernando Ortiz (1947) on transculturation. Ortiz, (1947) described this concept as the changes made to cultures as they come into contact with each other; both are changed by the experience, and neither retains the original identity of self after the contact. While there is a certain risk associated with the inclusion of non-situational knowledge associated with the presence of Ortiz's work, the addition allows for a broader understanding of the continuous nature of culture adaptation underway during the previous five centuries. Since Ortiz focused his work on the perspective of cultural morphing, I recognized that the inclusion of this later formed concept in my analysis was necessary to inform on the changes underway in Cuba in the period immediately following the cessation of hostilities in 1898. Concluding this review of culture and identity, an analysis of the use of civics education as practices used to culturally transform a population, provided a strong supportive and necessary feature needed to undertake my study.

One additional important aspect of any investigation of Cuba, Cubans, and the history of the island, is the concept of *Cubanidad*; loosely translated as Cubanness. Due to many factors which intertwined to affect the growth of the island of Cuba and the development of Cuban citizen identity, the concept of *Cubanidad* needs to be explored and understood, in order to shed

light on the forces within Cuba militating for and against annexation by the U.S. Without an exploration of *Cubanidad*, buttressed by Ortiz's (1947) work on transculturation, my examination and analysis of the attempted annexation would be a sterile view of historical events that fails to recognize the importance of a much more complicated and intertwined process.

While this selection of foundational concepts does not provide an exhaustive review of the development of nationality and ethnic belonging, that is not the primary focus of my study. Instead the examination of the effect of civics education requires these interrelated concepts as foundational support. The addition of the concepts of transculturation and *Cubanidad* serve to strengthen the exploration and analysis of my study by introducing concepts of culture that originate and are an integral part of the development of the island of Cuba and its people. Additional research in subsequent studies of this historical issue may develop further investigation of nationality, belonging, citizenship, acculturation, and other educative practices. At that time they will add to the further development of this topic. Subsequent to the review of conceptual perspectives on belonging, citizenship, civics education, acculturation, and *Cubanidad*, I present two related historical concepts. First, I discuss the events and forces that led to a desire by United States government officials, civic leaders in the U.S., and some Cuban groups, both on the island and in the U.S., to pursue annexation of Cuba by the U.S. I follow the historical review of the attempted annexation with a brief history of the development of the education system on the island of Cuba up to the commencement of U.S. involvement following the end of the wars that separated the island of Cuba from Spanish control.

Background of the Problem

Despite the long shared history of the U.S. and Cuba, little is currently known about the island's education system other than what is released by the Cuban government through carefully

managed research or staged interactions with U.S. educators. This is due primarily to the political wrangling carried out by the U.S. and Cuban governments that developed after the revolution led by Fidel Castro in 1959. The lack of interaction between the countries in education research and enhancement was not always the case. At the beginning of the 20th century, factions of Cuban citizens and the U.S. Military government briefly in control of the island were engaged in a collaborative effort to remake the schools in Cuba. These factions of Cuban intellectuals and the occupational U.S. government worked to remake the schools in the image of the American educational system. One side in an attempt to ensure an orderly annexation of the island following the Cuban War for Independence (a conflict usually known as the Spanish American War in the U.S.), the other as a means of developing independence for their island and economic opportunity with the colossus to the north.

Numerous citizens of Cuba were hoping for U.S. assistance to ensure their independence from Spain, but many others were not desirous of becoming a part of the United States. Still others were not sure whether their allegiance lay with either Cuba or the U.S., instead desiring to retain their Spanish citizenship while living on the island (Utset, 2003/2011). Alternatively, some Cuban factions sought the development of their own sovereign control over the island of Cuba with the aid of the U.S. government. The complexity of this topic and the necessity of developing an historical perspective congruent with the time period, has led many scholars to examine solely the surface aspects of this problematic period of U.S. – Cuban history. This study is an effort to examine that history, illuminate events, discuss key individuals, and shed light on the practices which were employed during this time of transformation in order to add clarity to the discussion about the attempted U.S. annexation of Cuba at the end of the 19th century.

Academic exchange and freedom of research on the island, once prevalent between the U.S. and Cuba prior to 1959, would have informed U.S. scholars on this topic. However, as I have witnessed first-hand during the research portion of this study, academic collaboration between Cuba and the U.S. has devolved since the Cuban Revolution of 1959. Inter-country education research rarely exists today between Cuba and the U.S. except under stringently licensed conditions that in effect requires a review and approval of all scholarly articles that utilize statistics by the Cuban government prior to publication. These restrictive conditions for research by U.S. scholars in Cuba are the result of the 53-year-old embargo imposed on Cuba by the United States after the revolution led by Fidel Castro in 1959 and further tightened by President George Bush in 2003 (Martinez, 2006).

Considering the impact U.S. styled education had on the island at the beginning of the 20th century, collaborative research focused on the history of the educative practices and their development over the decades should be a large part of the current discussion. However, due to the restrictions on travel to Cuba by the U.S. government and the constraints on open research in Cuba by their government little if any truly open exchange in this area has occurred in the last five decades. Research in Cuba by U.S. scholars is sorely missed in the broader discussion on the world's education practices. Regular and open access to Cuba by U.S. scholars has been strictly regulated and at times barred all together, especially after 2003. Despite the lack of research in Cuban education practices of U.S. origin by U.S. scholars, international organizations such as the World Bank and the Organization for Economic Cooperation and Development (OECD), have released reports that are beginning to fill in some of the existing gaps in current education methods on the island. Specific reports from UNESCO in 2007 and from the OECD in 2010 have indicated Cuba has achieved exceptional academic results in literacy, math and

science, outpacing the remainder of Latin America. One important note regarding the accuracy of these studies is the control over the release of educational test data by the Cuban Ministry of Education. However, despite access to current information on academic results, little is known about practice, and less about the historical development of that praxis. It would be fair to say that there is more information available regarding 19th century educative practices in Cuba under the Spanish than there is currently about current methods of teaching on the island. Due to several factors, not the least of which is the proximity of Cuba to the U.S., an investigation into the development of these existing methods from a historical perspective is necessary. The benefit of this study is the creation of a foundation on this topic that will aid future scholars in the study of Cuban education once the political events between the U.S. and Cuba are resolved.

One purpose of universal public education for a nation is to prepare its young citizens for an attachment to and involvement in the future of that country. Nations around the world try to achieve this aim through different methods, the majority of western nations through the use of some type of civics-based education practices. Some countries have had more success in developing civic attachment to their nation than others. For other countries the artificial arrangement of divergent ethnic clusters has militated against the development of a sense of nationalism in the population, instead helping to reinforce ethnic differences. One example of this failed artificial structure was Yugoslavia, constructed following the end of World War II and held together by a brutal dictatorship. Some have achieved a sense of nationalism that extends to extreme behavior, most notably in Germany during the 1930's and 1940's. A great body of scholarship has investigated these extreme cases of nationalism, most notably by Ignatieff (1993) and Brubaker (2004). However, few research studies currently exist that examine the use of civics education as a process of transforming a population subsumed by a divergent culture.

Additionally, I have been unable to discover a study undertaken in the United States that has investigated the civics education practices utilized as extensions of U.S. foreign policy actions during the turn of the 19th to 20th centuries, the height of “Manifest Destiny” and territorial expansion. This study will also seek to inform the missing gaps in scholarship that currently exists regarding the use of civics education as a transformative process in Cuba vis-à-vis the United States.

Given the lack of scholarship on Cuban education practices, it is my intent in this study to provide a deeper and more complete understanding of the development of the Cuban education system during the period of U.S. occupation, 1898-1912, with a special focus on civics/citizenship education. It is during this transitional phase that Spanish structured education methods were supplanted by American practices and can be considered as the era in which the current school system of Cuba has its roots. Despite the transformation of the education system on the island following the Cuban Revolution of 1959, vestigial effects of U.S. intervention in the development of the Cuban education system are still visible today. Examples of this style are the age structure of grades, courses taken, and the overall construct of the individual school administration. The intervention by the U.S. government in the reshaping of the Cuban education system during the period of occupation following the culmination of the Spanish American War has important implications in the understanding of this time period and the use of civics education as a transformative agent. To this combined end, I begin my study.

The Research Problem

In this study I examine, analyze, and explain the forces and events which directed education processes in Cuba during the period leading up to and immediately following the Cuban War for Independence from Spain. Primarily, I analyze how civics education was utilized

by the U.S. Military Government of Cuba as the tool to attempt a transformation of the Cuban people's culture, with the ultimate aim of annexing the island through acclamation of the inhabitants. Despite the importance of this time period in the development of civics education practices in the U.S.; little research exists today that examines the use of civics education in Cuba as a transformative agent regarding development of citizenship. This study, in part, fills that research gap. Although there is significant scholarship, most notably by Pérez (1983, 1995), and Utset (2011), that discusses the utilization of education as a tool of annexation on the island of Cuba, there is however, not one comprehensive study that has examined the process and documented the progression of what courses of civic education and the educative methods that were used in the attempt to transform the populace. Through an examination of primary and secondary data, in Cuba and the U.S., I examine the events, decisions, and actions, by U.S. and Cuban scholars and government officials that attempted the transformation of education in Cuba as a means of ensuring annexation by acclamation of the inhabitants of the island by the United States.

Purpose of the Study

I became interested in the Cuban education system while I was teaching in a very diverse school system in Tampa, Florida. Several of my students that first year were refugees from Cuba. The quality of their school work and interest in their studies caught my attention. Not only were their skills in many subjects advanced over my American students, but they showed impatience with the slower pace in the classroom. Urged on as a means of better understanding the needs of my students, I began to explore the Cuban education system and quickly learned that the level of literacy on the island approached 99% (World Bank, 2000). Further examination uncovered a school system structured on U.S. constructs, but one that was

entirely community and child-centered, and was also leading all of Latin America in math, science, and reading. Comparisons I made between my Cuban and U.S. students were troubling. While my Cuban-born students were near the top of my class, despite still learning English, many native-born students were struggling with the same material. Where my native U.S. students looked for ways to avoid additional coursework, the students born in Cuba were seeking out more advanced work. This disparity piqued my interest and propelled me down this path to research the development of the system of education in Cuba.

Delving into the research on the Cuban education system, I compared literacy levels for Cuban and U.S. students near the same age. While this is slightly problematic due to the differences in defining literacy between these divergent school systems, by relying on the World Bank (2000) figures I was able to compare the two groups with little difficulty. Despite the lack of materials and proper (by U.S. standards) facilities, according to this data and my own in-class experience with students from the island, Cuban students appeared better prepared academically.

In order to analyze how the education system of Cuba arrived in its present state, I recognized it was necessary to unearth the historical forces that propelled the Cuban student to the front of the academic pack in Latin America. While it was apparent from my limited research into the current conditions of education in Cuba that research on the present-day conditions of the Cuban education systems could assist scholars in transforming U.S. schools, it was also clear that a deeper analysis of the historical processes that developed the system was needed first, in order to properly identify changes in education practices and track process development. Despite several months of research and exploration on the topic of the history of Cuban education, I was able to find only a few references in literature to this important discussion in U.S. libraries and archives. The majorities of these was prepared outside of the

U.S., or were dated prior to several important events in Cuban history. One enlightening work by Martin Carnoy (2007) explores in-depth the current practices of Cuban education. Relying on World Bank and Organization for Economic Co-Operation and Development (OECD) reports and additional outside research Carnoy (2007) explores literacy levels and teaching practices of students and their teachers before concluding that an advantage lies in the Cuban system of education. Broadening my search outside of the U.S., I was able to uncover an extensive work by MacDonald (2009), out of England, on the Cuban schools system. MacDonald (2009), taking his lead from Carnoy (2007) and Gasperini, one of the contributors to the World Bank report from 2000, further explored the teacher training system and the cadre system used by Cuban teachers to improve their praxis. However, neither of these otherwise excellent works on the current state of Cuban education delved into the historical aspect of the island's education system prior to 1959 with anything other than a cursory reference.

Despite the paucity of resources I was able to initially uncover through normal research methods, I was determined to comprehend how the Cuban education system had arrived at its present state. I therefore found it necessary to expand my review to an in-depth study of the historical forces that crafted the Cuban education system with the recognition that travel to Cuba was necessitated in order to uncover as much about my topic as possible. Since I was delving into a field without much existing current scholarship, I found it necessary, through an examination of the Gall, Gall, and Borg (2007) rubric on qualitative studies construction, to begin from a qualitative perspective allowing for important concepts to emerge rather than assuming there was coherence in the historical perspectives I would uncover. This was especially important due to the distance in time from my analysis, the lack of confirming or disconfirming views from the authors of this time period as all were deceased, the changes in

political views between the two countries over the last century, the lack of documents that supported or disproved author's perspectives due to destruction of the archives in Cuba, and the unsettled nature of the history as it was written during the time of yellow journalism and jingoistic perspectives. I believe that by undertaking an historical study, I would inadvertently replicate the *mélange* of differing perspectives and would come no closer to an accurate analysis of this seminal event in Cuban history. By instead grounding my perspective in a qualitative study, I was able to allow the concepts that remained for me to uncover to rise to the fore and chart the course of my study. While this process presented specific difficulties inherent in the theoretical perspective of qualitative theory, I explain how I was able to militate against these difficulties in my methods section below. Despite this study not being grounded in an historical framework, I find that I must adhere to some historical practices, otherwise the study would be far ranging and beyond the focus of my specific questions of research.

Proper historical practice requires that an historical analysis begins with an initial event (if that event can be ascertained) in order to fully uncover all of the forces acting on that event and subsequently upon the present. Serving as a nexus point, the intersection of past and present informs examination of the shaping events and clarifies the effect of the event upon the future. As such, the purpose of my study was analyzing the first direct, sustained contact between the U.S. and Cuban education systems that occurred following the conclusion of the Cuban War of Independence and the Spanish American War. It was during this time period that I believe the U.S. occupational government attempted to restructure the Cuban education system and introduce the use of civics education as a means of annexing the island of Cuba. While the U.S. and Cuba had been trading partners for over two centuries, Spanish dominance over the island left little inroads for adoption or desire of American education practices. A clear distinction

between Spanish and U.S. control over the education of school children on the island can be determined as the end of the Cuban War for Independence in 1898/ termination of the Spanish American War. As such, this point in time allows for a definitive start of my analysis.

Importance of the Study

Due to the lack of significant interaction between scholars in Cuba and the U.S., historical research on the education system of Cuba has come to a virtual standstill in this country. While work continues apace on several fronts associated with education research relative to the Cuban system, little historical research on education is evident in the review of literature on this topic. Despite the short physical distance between Cuba and the United States, and our long shared history, I had little initial success in discovering research related to the historical development of the school system on the island from the U.S. I discovered that even less had been discussed in scholarship over the decades and most importantly in recent literature about the events that directed the transformation of Cuban education system following the Cuban War for Independence. The lack of access to Cuba to undertake normal research on education (as well as other topics) has exacerbated this issue. The difficulty in access has left major gaps in the literature regarding events in Cuba's education processes and history, including the counter-narrative of the attempted transformation process as seen by current Cuban scholars of education history.

The enforcement of academic isolation as a political policy has led to a dearth of information available for review by any scholar interested in the study of the Cuban education system. Due to the restrictions on academic travel, collaboration, and exchange, few articles on this topic have made their way into international journals, especially into those journals that are based in the United States. However, following my initial exploratory research during the

months of June through August of 2012, I was able to uncover historical documents held within the National Archives and Library of Congress in the U.S., in several libraries across the city of Havana, Cuba, and on international library databases. In addition, the libraries of several U.S. universities contained references, primary documents, and early 20th century historical work related to this topic. During the course of my study I visited libraries and archives in the U.S. and Cuba to explore the numerous primary and secondary sources available that were uncovered during my pilot study on this topic. Through this process I was able to uncover numerous documents, books, and letters that discuss the issue of the attempted annexation of Cuba, several that, in part, discuss the use of civics education practices in this effort. This study, fills in part, a void in the scholarship and reinvigorates the discussion of the history of Cuban education and the connection with U.S. practices to shape that education system.

Theoretical Framework

To conduct this study I collected and examined original documents in several libraries in Cuba, the National Archives and Library of Congress in Washington, D.C. and College Park Maryland, the libraries of the Franklin Institute in Philadelphia, the State University of New York at New Paltz, Harvard University, and several online sources such as the Hathi Digital Trust, Google Books, and *Biblioteca Digital Cubana*. In addition to the original document collection and examination, I also relied on primary source and period texts and published reports of the Military Governor of Cuba, censuses conducted by the U.S. Military Government and the Spanish government during the 19th century, and official reports for the development of schools in Cuba that describe events during this time. Finally, to ensure that this research integrates into the ongoing discussion on this topic, I reviewed current scholarly work that included texts and articles specific to this subject. Since my study is bound within a framework

of data collection from historical sources, it was imperative that the theoretical method chosen supported the variability of data collected from a variety of historical sources, time periods, languages, and ideological perspectives, while also allowing for the use of preconceived perspectives developed from previous research.

My study investigates a historical period through the analysis of documents, and as such appears to exist in the qualitative realm. However, in order to definitively identify the type of study that best fit my topic of research, I utilized the “Differences Between Quantitative and Qualitative Research” guide in Gall, Gall, and Borg (2007). Their rubric classifying the differences between quantitative and qualitative studies is designed to position studies in either a quantitative or qualitative perspective. My intent, through the use of this rubric, was to firmly position my study inside one of these two methodological structures.

Reviewing the constructs of Gall et al.’s rubric, step by step, I determined that I was assuming that social reality in my study was constructed by the participants in it, rather than assuming that the reality of this period under study was objective. Next, I agreed that the social reality of my study was continuously constructed and specific to that time period and not relatively constant across time and different settings. Further analysis of the guidelines allowed me to recognize that I viewed human intentions and actions as major aspects of my study, and did not see causal relationships as mechanistic in nature. While my study does not allow me direct participation with the subjects of my research because it is an examination of the historical past, I was able to briefly interact with several of the scholars who have previously investigated this era, most notably Phillip Brenner of American University in Washington. D.C.

Delving deeper into the guidelines of Gall et al. (2007), I recognize that my study analyzes the meanings that individuals created, rather than looking at behavior. A large aspect of

my investigation was uncovering data hidden in the documents obtained during the collection phase of my study. This fits perfectly with my planned research, and is in opposition to analyzing social realities as variables of a study. Looking at the preconceived, emergent aspect of the Gall et al.'s (2007) guidelines, I had a quandary which I address and clarify below in the data collection portion of my study analysis.

Since I was not analyzing data statistically, but instead utilizing analytical deduction to uncover hidden themes in the collected data, I had further evidence to support a qualitative study. Finally, the report style used to discuss the data was rich in interpretation, and allows readers to develop their own views of the collected information. A depth of specific content collection method rather than a broad statistical review further bound this study in a qualitative framework (Gall et al., 2007, p. 32). Thus based on my analysis of the aforementioned guidelines, my study clearly belongs in the qualitative framework category.

Research Questions

The purpose of this research was to explore the condition of the Cuban education system, and the changes imparted upon that system, by the United States Military Occupational Government, in Cuba, in the period immediately following the cessation of hostilities of the Cuban War of Independence, or as it is known in the U.S., The Spanish American War (1898). The primary question of significance is what processes led to the transformation of education practices on the island following this seminal event. To support this query, I developed a series of questions that inform along the time progression from just prior to the termination of Spanish rule through U.S. occupation. While these questions are not definitive of all areas I could have researched, I believe that they provide the most comprehensive approach to uncovering what events occurred that affected the education system of Cuba during the period of U.S. occupation.

While other researchers may choose different points of initial inquiry, these three questions satisfied my area of interest regarding this topic and established a foundation that future scholars can use for further research. From an exploration of the following questions, this study managed to uncover many of the process of transformation utilized in the attempted restructuring of the Cuban school system by the U.S. government during the time period of 1898-1912.

1. What courses were included in the K-12 curriculum, under U.S. military rule after the Cuban War for Independence, and what perspectives were utilized in their selection?
2. Who were the influential actors involved in creating the schools and curricula in Cuba after the Cuban War for Independence?
3. Did the U.S. try to influence the Cuba education system after the Cuban War for Independence? If so, in what ways?

Method of the Study

Through the use of a qualitative, analytical, historical study, I began research to add to, and coalesce, the ongoing discussion of this topic by examining the forces and conditions which created the civics education courses in Cuba at the end of the Cuban War for Independence/Spanish American War. More specifically, this study examined the use of civics education as a means of attempting the transformation of the predominantly Spanish speaking subjects in Cuba into emerging, English speaking, proto-citizens of the U.S. By the term proto-citizens I mean someone who is a first time citizen of the U.S. who had allegiance to another country prior. Establishing the foundation of my study in grounded theory, I initiated a pilot study during the summer of 2012. The information gleaned from that research in Cuba and the U.S. guided the remainder of my research. In order to undertake the pilot study, primary and secondary documents were collected, coded for extant themes, and analyzed to identify similar

issues in a literature review. Using an inductive process, the developed themes that emerge from the pilot study, were analyzed to identify forces that directed civics education in the time period under examination.

Research for the pilot portion of my study was undertaken at the University of Havana, *Biblioteca Pedagógica Félix Varela Morales* in Havana, Cuba, *Biblioteca Centro de Información para la Educación (CIED)* in Havana, Cuba, Library of Congress in Washington, D.C., and the library at the University of South Florida. Research during the main data collection phase of my study was conducted at libraries associated with University of Havana, *Biblioteca Pedagógica Félix Varela Morales* in Havana, Cuba, *Biblioteca Centro de Información para la Educación (CIED)* in Havana, Cuba, Library of Congress in Washington, D.C., Harvard University in Boston, Massachusetts, the State University of New York at New Paltz, the Library of Congress in Washington, D.C., the University of South Florida in Tampa, Florida, the Hathi Digital Trust, Google Books, The *Biblioteca Digital Cubana*, American University Library in Washington, D.C., the National Archives in Washington, D.C. and College Park, Maryland, and the Franklin Institute in Philadelphia, Pennsylvania, utilizing both physical documents and digital facsimiles of archived original data.

In a review of the existing literature I examined the historical and conceptual forces that shaped today's education system in Cuba in three phases in this study. The first phase examined the conceptual components that direct the development of citizenship and belonging in order to develop a foundation for my study. The second phase uncovered the historical record as it exists in primary documents, reviewing two eras. The colonial/nascent independence era was examined briefly, beginning with a review of early colonial processes that paved the way for the Spanish school structure in place in 1898. I then continued with an exploration of the period

following the inception of the Ten Years War which commenced in 1868. Following the foundational exploration of the colonial period, I examined the events surrounding the time period that is the crux of this study, 1898 to 1912. This historical analysis of the development of education on the island helped to clarify the school structure as it existed under Spanish rule before being reshaped during the U.S. occupation. In addition, integrated within the analysis is an explanation of what it meant to be a native-born Cuban or *Criollo*. This perspective is essential to the understanding of *Cubanidad* or Cubanness, and how some of the Cuban educators pushed back against the system the U.S. government was attempting to install on the island. Integrated throughout the historical analysis are examples of Spanish, American, and Cuban versions, of what education should consist of in Cuba. The third phase of the investigation seeks out the specific nature of civics education practices as they were used during the occupation of Cuba by U.S. forces.

Assumptions and Definitions

The main assumption of this study is that factions of the U.S. government utilized a systematic process of reconstructing education in Cuba following the Cuban War for Independence, and the Spanish American War. Included within the massive reconstruction of the school curriculum was the purposeful introduction of civics education in order to remake the Cuban society in the image of the North American culture in order to prepare the island for eventual annexation by the United States. Additional assumptions include: the recognition by most Cubans, and by Cuban I mean a person who was born on the island or who had immigrated to the island and considered themselves as a permanent inhabitant with cultural ties to Cuba, as being subjects of the Spanish Crown prior to 1898; a desire by factions within the United States government and private sector to annex Cuba in the decades leading up to U.S. intervention; the

necessity articulated in the press and within U.S. government factions of transforming Spanish/Cuban subjects on the island to U.S. cultural practices; and the use civics education, specifically the School City program developed by Wilson Gill, by the Military Government of the U.S. to assist in the cultural transformation process.

I do not arrive at these assumptions without support of other scholars who have written extensively on the processes used to reconstruct the social systems of Cuba during this time period. Several have spoken specifically to the use of the school system as a transformative agent by the U.S. occupational government. One of the clearest examples of this perspective is offered by Louis Pérez in his article entitled “The Imperial Design: Politics and Pedagogy in Occupied Cuba, 1899-1902” (1982). Pérez (1982), in discussing the design of the reconstruction process utilized by the occupational government stated “At a more fundamental level, however, education functioned as the cultural component of the larger annexationist design. The classroom was transformed into an agent for the transfusion of cultural values and the *transfiguration of political attitudes*” (my emphasis) (p. 7). It was these political attitudes that were most clearly on the minds of those men and women who desired annexation both in the U.S. and in Cuba. The concerted effort to restructure the political attitudes is evident in the replacement of the Plan of Public Instruction of 1880 in the schools by that of the Ohio School Law. Additional changes included the introduction of English language as a requirement in the curriculum, and the introduction of the School City program designed by Wilson Gill to teach western styled civics to Cuban school children in lieu of Christian doctrine and religious morals taught under the Spanish.

Marial Utset (2011) also devotes considerable discussion to the importance of the cultural transformation of Cuba through the use of the schools. In a work that examines the

cultural transformation of Cuba attempted under the occupation by the U.S. government forces, Utset (2011), presents information that describes the transitioning of military barracks to schools, the introduction of English language instruction in the classroom, and the introduction of a civics program designed to modernize and civilize the island as a prelude to annexation.

José Martí (1853 – 1895) was also concerned about the transformative power of education over the Cuban people in the construction of national identity. In “*Historia de la Pedagogia en Cuba*” (1945) Emma Perez speaks about the transformative power of instruction as it was understood and supported by Martí in his attempt to craft a Cuban nationality separate from that of Spain. Perez (1945), offering her thoughts on the importance Martí placed on education states “*Por ejemplo. Algo que es necesario subrayar fuertement en la obra educative de Martí es su afán de extender la escuela, su enorme preocupacion constante de que tuviera la enseñanza una funcion social marcada y un claro carácter nacional*” (p. 346). (“For example, something that should be strongly emphasized in the educational work of Martí is his eagerness to extend the school, his enormous constant concern that education would have a marked social function and a clear national character”). Martí’s own words echo those of Perez in his essay on Education and Nationality printed in *La Patria* July 2nd of 1892. Although Martí was speaking of the school run by Tomás Estrada Palma (1832-1908) in New York, his comments clearly indicate that he was concerned about the risk associated with a more powerful culture instructing a weaker or less dominant culture.

Educating a son of these lesser peoples in a nation of opposite character and greater wealth might lead the student to a fatal opposition to his native land, where he must make use of his education – or to the worst and most shameful of human miseries, the scorn of his people – if, while nourishing him with skills and practices which are unknown or

poorly developed in the country of his birth, he was not taught with continuous kindness what relates to him and maintains him in the love and respect of the country in which he must live. (Foner, 1979, p. 170)

Martí clearly understood the importance of education in the shaping of national identity, and was concerned about who determined the content and focus of that education.

While I recognize the necessity of an open time structure to allow the research to guide the study, I choose to bind the main investigatory time period between 1898 and 1912. These dates are chosen due to the ending of hostilities from the War of Independence on Cuba in 1898 and the introduction of education reforms by the United States Military Governor of Cuba at this time. The upper boundary is chosen due to the conclusion of most direct involvement and financial support by the U.S. Military Occupational Government in the Cuban education system by 1912 and the calls for reform of the existing system by several Cuban scholars, most notably Salvador Massip (1891-1978), an influential Cuban educator, politician, author, and diplomat. While I relied on the discovered and analyzed documents from both the pilot and main portions of this study to inform the direction of my inquiry, I began with the aforementioned research questions, aware that they were arrived at through the use of prior knowledge and personal interest. As such I am also aware that they guided the initial research effort and have an effect on the final results. The abovementioned structure fits the current acceptable methodology for undertaking an exploratory historical research study as defined by Mahoney and Rueschemeyer (2003).

It is a safe assumption that the current education system in Cuban did not form independent of outside forces. A quick survey of the history of Cuba shows the intervention and cultural adaptation first brought about by Spain, and then the United States over the course of

five centuries. During the majority of this time, an education system was introduced by Spanish authorities and slowly adapted to fit the needs and some of the desires of the Cuban people, as they were seen from Spain. Following the culmination of the Spanish American War in 1898, the U.S. took over the crafting of a school system to recreate the structure of education in a manner that supported United States interests. During this entire period, stretching almost five hundred years, control of the education practices on the island was rarely under direct Cuban authority.

Another often cited purpose of education is to inform young children of their society's culture. Bruner (1966) argued for "the ideal that education should serve as a means of training well-balanced citizens for a democracy" (p. 1). I add to Bruner's argument that the purpose of education for a nation is to inform children of the events, laws, and history that define them as a people, and to allow for the continuation of the existing culture. This is similar to the argument brought forth by Gellner (2006) in his exploration of nationalism. However, Gellner takes this discussion further, asserting that the nation drives the transmission of culture, through historical education, in order to prepare citizens for the needs of the society.

By examining the integration of these three perspectives, it is evident that the history of a culture is integrally linked to the education of its members. Cuba is no different than other countries in this respect. Lutjens (1996) agrees, stating: "education has a deep and historical relationship with the state in Cuba, a relationship that reflects the underlying connections of policy, power, and purposes typical of all modern states and, at the same time, one that is specifically Cuban" (p. 21). Beginning from this perspective, I believe that a review of historical events related to Cuban education informs the purpose of this study, and directed the discovery process through the development of research themes. However, the historical review in this

study was not meant to be a comprehensive exploration of the history of Cuban education. Instead, it was an investigation of how the history, people, events, and education practices conspire to shape the Cuban school system, and how the concept of *Cubanidad*, or what Pérez (1995) calls the *independismo* (independence) of the Cuban people, worked to counter the transformation. As such, my study helps to craft an understanding of the processes utilized by the U.S. government's attempted annexation of the island, through an awareness of the history which helped prepare the process.

Delimitations

One of the weaknesses of the history of early Cuban education analysis, for U.S. scholars, is the lack of comprehensive sources in English either as an original work or in translation. While Benjamin (1990), Pérez (1995), Gott (2004), Aguilar (2006), Friginals (1985), De Quesada (1905), and Morales (1923), along with several other U.S. and Cuban authors have written extensive explorations of Cuban history, education appears only tangentially in their presentations. A second issue is the sanitization of scholarly work that is in opposition to the current political perspective on that historical event. Scholarly works that may have informed and supported de Quesada's (1905) report are missing from the various libraries I visited in Havana, Cuba, and have not appeared in the recent online version of the Cuban National Archives. In addition, the atmospheric conditions of the island have attacked older works that were not properly preserved, rendering most useless for research. Due to a lack of funding and even less desire to preserve a history that is unpopular in Cuba, original source documents are almost nonexistent in the libraries of the island. A major event that highlights the treatment of historical documents on the island occurred in 1905 when the entirety of the National Archives Building was transformed in short order to barracks for the housing of troops. During this short

period, according to Luis Marino Pérez the author of the 1907 “Guide to the Materials for American History in Cuban Archives”, the historical records were thrown out of the building by groups of laborers working both day and night, and the documents were treated as if they were only so much rubbish” (Pérez, 1907, p. vii). Added later in the preface to his published work, the editors have indicated that effort was undertaken to correct the problem, however, it appeared that some damage was un-repairable with many bundles of documents missing or damaged beyond repair. While many important documents were saved by the diligent efforts of the Archive workers, this is one example of several that indicate how the history of the island has been treated over the decades since the turn of the 20th century by its primary caretakers.

An additional factor that limited the availability of primary source documents relating to the education system in Cuba was the removal of all archival documents from the island following Spain’s defeat. In the months between July of 1898 and the transfer of control over the island to the U.S. on January 1, 1899, the Spanish military systematically removed all documents and official records from the island. So complete was their efforts that the incoming U.S. officers had very little information to manage the affairs of the island upon.

In order to correlate the historical texts with specific education-history events in this review of literature, I initially relied upon de Quesada’s (1905) report on the history of education in Cuba. Chapter fourteen in de Quesada’s account is part of a larger report presented to the state department in 1905 while the U.S. Military Governor was not in direct occupation of the island. The extensive reliance on de Quesada’s report, while not without risk, was necessary during the preparation and pilot study undertaken in 2012. His chapter on education in this much more comprehensive report on Cuba, provides one of the few linear presentations of educational history which is juxtaposed against historical events to ensure accuracy. Beginning with the

work of de Quesada (1905) as a foundation, I was able to locate additional sources and discover many areas of inquiry that would have otherwise gone unexamined.

As a result of my pilot study in Cuba, I can now include historical support to de Quesada's (1905) work from three Cuban sources. Emma Pérez (1945) in a study of the *Historia de la Pedagogía en Cuba: Desde los orígenes hasta la Guerra de Independencia (History of teaching in Cuba: From the origins until the War of Independence)* adds depth and support to the information presented by de Quesada (1905), and much new information on the Plans of Study, and the structure of the system of education on the island. Further support of de Quesada (1905), is provided by Renate Simpson (1984) who examines higher education in the colonial period, and Sosa Rodríguez and Penabad Félix (2008) whose "*Historia de la Educación en Cuba tomo 8*" focuses on the late 19th century and presents detailed lists of courses and information on teaching practices under the Spanish. Both of these last two historical works on education were published in Cuba after the revolution of 1959 and as such approach the U.S. occupation with a unique Cuban perspective that has added fresh insight to my study. While these additional sources will greatly add to the triangulation of data for my study, despite repeated visits to Cuba's public and private libraries in Havana, Cuba, few additional historical works or original documents were available for my review. In the latter stages of my research I uncovered scant hints in the National Archives in Washington, D.C. of the possibility of further original documents related to the education system under the U.S. occupation available in the National Archives of Cuba. However, due to government regulations regarding access to the archives for research purposes, my ability to access them under a standard visa and without the endorsement of a local academic institution complicated my viewing of any Cuban archival material.

Some of the difficulty with obtaining verified historical Cuban documents in Cuba is associated with the continuous strife on the island during the previous two centuries. On several occasions, prior to and during the post-occupation period, municipal town halls and other government offices were burned to the ground along with the repositories of government reports that would have added to the accuracy of de Quesada's and other researchers work. Due to the nature of his report, the date of construction, intended audience, and the extensive citation of this particular work, other authors have relied extensively on de Quesada (1905) to add credence to their studies.

Summary

After many years in isolation can Cuba emerge once again as the "key to a new world?" The intent of this study is to examine and analyze the precept that the machinery of attempted annexation was the use of civics education, the retraining of teachers, the introduction of textbooks, the restructuring of the curriculum, and the introduction of a system of school law and school structure based upon U.S. systems intended to reshape the culture of Cuba. These education practices appear to have been utilized by the U.S. Military Occupational Government following the culmination of the War for Independence in Cuba. The method and reason for the annexation of Cuba was the origin of this study; the process of analyzing the curricular changes imparted upon that system, specifically those that adapted or introduced civics education by the United States Military Occupational Government, was the purpose. In order to uncover the intent of the varied factions from inside the U.S. government and in the private sector, an historical analysis of directives, reports, and historical accounts was undertaken in the U.S. and Cuba. Specific attention was focused on those documents that discuss the use of civics

education, and the tools of educative processes, that were utilized with the intent of reshaping the population of Cuba.

In addition I make the case for continued research in the field of education on an island where high academic achievement as a goal for all people has been expressed by the revolutionary government. The exploration and analysis of the process of civics education used as a means of attempted annexation can inform current research in many fields of social studies education. My study explores that possibility.

Chapter 2

Literature Review

“Educar es dar al hombre las llaves del mundo que son la independencia y el amor, y prepararle las fuerzas para que lo recorra por sí, con el paso alegre de los hombres naturales y libres” (‘To educate is to give people the keys to the world, which are independence and love; granting them the ability to walk alone, at the happy pace which is that of natural and free individuals’.) José Martí (1853-1895) (Dario, 1905, p. 153)

Historical Tapestry

One of the important concepts of historical inquiry is the understanding by the researcher that almost nothing occurs without an impetus, no matter how slight, from some prior event. Events in history are interconnected in a manner where one event bears upon another in order to make meaning of both. This being taken as a certainty in most historical studies, so shall it be taken in mine. In essence, I assert that the events leading up to the end of the Cuban War for Independence exist as a tapestry of connected events, of interwoven threads. Just as in a woven cloth, each thread of history carries an importance to the value of the whole. When the cloth is new, the threads are tightly woven, and little disagreement exists over the clarity of the pattern in the cloth. However, over time, the cloth begins to wear, some threads come loose, others wear away entirely, and soon the cloth holds little resemblance to its former pattern. Such is often the case with historical reviews.

The difference between worn cloth and history is that often, the threads of history are captured in period documents, reports, personal recollections and letters, and textual analysis. From these scattered fragments, much of the whole can be reassembled with enough clarity to provide an accurate representation of what occurred. Unfortunately, just as a photograph of an event captures only a moment in time and one perspective of view, the reconstruction through

historical documents relies on preservation by previous historians and the public, of original documents, and accurate representations in historical works. For my study, the quantity of information available was limited due to the lack of preservation in Cuba, and a scattering of personal and official reports across numerous repositories both in Cuba and the U.S. However, I believe that enough of the original pattern exists in the scraps of information distributed across the two countries in question to patch together a close resemblance of the events as they transpired. To ensure accuracy as best as was possible I examined many bits and pieces of information, some that may have seemed small and insignificant at that time but later proved important, and others large and clearly relevant to the topic. The purpose of any initial research being to determine not only which threads of inquiry are the important ones, that is often the easy aspect, but to identify those events that can be given less weight in the discussion. This is not to say that these minor issues hold no importance just that they do not inform much upon my present study. Through the collection, examination, and analysis of these remnants of history, I encountered a clearer picture of what transpired during this momentous time. My intent of this review of pertinent literature was, to piece together, for scholars and other interested parties, a more complete view of the historical tapestry of this time and series of events, that existed for me, as I began this study.

The swirl of history that surrounds this period in time has shaken loose many threads in this tapestry; several others have worn away entirely. Some have been adapted by political needs to present history in a specific light. Still others, while they remain visible to researchers, hold little significance to the current discussion that they may have originally held. The vagaries of time and the interest of various historical scholars have kept some threads as new, while other important and useful bits have been lost to politics, the elements, and the strain of use and time.

To include the myriad events and issues pertinent to this time period, and ancillary to my main topic, would entail a review much more in-depth than necessary, and would repeat scholarship already accomplished by others. Therefore, my review of the current literature on this topic necessitates a thinning of the mass of loosely related data down to what was necessary to inform my study, and nothing more. A method of winnowing out the seed from the cotton, in the case of a historical inquiry of this type, was accomplished through an in-depth review of the ongoing discussion of other scholars interested in similar topics. However, in order to accurately present the information in historical context, the discussion must begin with the period mindset of the era under discussion. To confront a historical event with theoretical perspective developed through hindsight not only misrepresents the occurrence, but weakens the bonds of significance. It is with this understanding of historical significance in mind that I reviewed ideology as close to the time period under examination as was possible. Through a thorough review of the period-focused discussion, issues of importance emerged and others that have been discussed to the exhaustion of new inquiry faded to the background.

In my study the threads that I determined to be important included those that have evolved from my pilot study exploration of the tool used by the U.S. government in Cuba to attempt annexation of the island. The primary tool, amongst others, was civics education. Citizenship or Civics education in its popular manifestation in the U.S. today usually is presented in high school to ninth or twelfth grade students as American Government. While the concept and content of American Government may appear familiar to those of us who experienced this class in high school during the last half of the 20th century, civics education was not always the homogenous course of study presented to students today. Instead, civics education was seen as a

process through which the customs, mores, and culture of one society could be transferred to those entering, be they young children born of the native population, or arriving immigrants.

To develop an understanding of the many components that constructed civics education in the era preceding 1898, I first examined belonging, citizenship, and culture as a means of comprehending what constituted a citizen at the end of the 19th century. As Brubaker (2004) argued, belonging and citizenship are highly reliant on the cultural construction of the society. Cultural construction of any social group can be conceived as Hall (1976) offers, in a manner similar to an iceberg. In Hall's (1976) iceberg model, there are two major levels, those above the surface that are easy to recognize, such as language, law, culture, and education, and those hidden below the surface, such as beliefs, physical gestures, and patterns of thought. While a full investigation of all aspects of the cultures of the Cuban and American people would present an especially strong foundation for any study, I am interested only in those that are in the surface realm of Hall's (1976) model in my current research. A full investigation of culture as it pertains to the multicultural island of Cuba and the United States in 1898 is beyond the scope of this study, and has been partially presented by several other scholars, most notably Louis Pérez (1982; 1983; 1986; 1995) who will be relied upon heavily in discussions of Cuban culture from this time period.

Having examined the constructs of belonging, citizenship, and culture, I next briefly explored the processes of acculturation and assimilation as they were seen by scholars of this time period. These two terms were often used interchangeably in the late 19th century, and while current anthropological thought sees them as two different concepts, period ideology saw them as almost synonymous. In order to situate these terms in context, three influential cultural

scholars of the late 19th century are also discussed in order to draw out an informed perspective on acculturation and assimilation evident in this time period.

Cuba's unique population, a mixture of Indo-Caribbean, African, Spanish, British, French, and American, blended together and then remixed, has crafted a concept of belonging commonly known as *Cubanidad* or loosely translated as Cubanness. As Ortiz (1949) described this concept, *Cubanidad* is like a stew, sitting on the fire for a long time; the components added at the beginning are now inseparable and indistinguishable from each other. As each day passes new elements are added, mixed with what was in the pot from before, and blended to become a new version of what was earlier a different stew. To fully understand Cuban culture and the development of citizenship on the island, I examined this concept further, adding in the voices from Pérez (1983), Pérez-Firmat (1997), Utset (2011), and others to enrich my understanding and the importance of *Cubanidad*.

To properly review the forces that were used in the attempted transformation of the culture of the Cuban people, it was necessary to review the historical events that led to the period under study. Cuban culture, in the 19th century and today, was a polyglot of ethnic clusters. Spanish explorers, remnants of native *Taíno*, native-born offspring of Spanish parents, slaves stolen out of Africa, Chinese immigrants, and North American transplants, had intermarried and produced a population that was, and remains today, distinctly Cuban. To begin an understanding of what it means to be Cuban, I examined a brief history of the island, followed by a more in-depth review of the history of education in Cuba up to the time under study. My review of the pertinent literature next examined what had been discussed by de Quesada (1905), Robinson (1905), Pérez, E. (1945), Pérez, L. (1982; 1983; 1986; 1995), Benjamin (1990), Gott (2004), and several notable Cuban Studies scholars regarding the history of the time under study. The

historical review touches on aspects of education as discussed by the aforementioned scholars; however, the existing literature is scant in its treatment of causes and purpose of education as a transformative tool.

Citizenship and Belonging

The United States desire to annex Cuba and join it as an integral part of the expanding U.S. was an action fraught with difficulty. Although Cuba and the U.S. are adjacent land masses and had a long shared history of trade, differences existed in the cultural origins of these physically close neighbors. Several important issues stood between the desires of the U.S. government to integrate the people of island of Cuba into the United States population. Included in these was the U.S. perspective of superiority over their southern neighbor. Despite the over three centuries of close economic interaction between the two peoples, numerous differences existed in areas such as language, religion, law, and education. It is these different concepts that Hall (1976) would identify as the apparent, or visible, aspects of culture.

At the end of the 19th century, Cubans were subjects of the Spanish Crown, who mostly spoke Spanish, and followed the rituals associated with religion, law, and education that were distinctly of Spanish and Latin (Roman) origin. During Spain's rule of the island, the people of Cuba were an amalgamated group developed from immigrants of several regions of the Iberian Peninsula, the Caribbean, Asia, North America, and Africa. The historical origin of education, law, religion, and language in Spain, and by association, Cuba, was derived primarily from the practices of the original inhabitants of the Iberian Peninsula, which had been heavily influence by the Roman Empire. The regional groups from Spain and Africa intermarried with the native *Taíno* developing a people that existed in two worlds, sometimes Spanish, but always Cuban.

As the Cuban War of Independence came to a close in 1898, three forces were in play that impinged on the way-of-life of the people of Cuba. The first were their historical ties to Spain: the Spanish language, Spanish culture, Latin based law, Catholic religion, and church-centered education. Next, were the behaviors and beliefs imported from the U.S.: English language, a polyglot culture, law, Protestant religions, and a secular education system. The third, often in direct opposition to the first two quasi-foreign but familiar belief systems, were the cultural behaviors of the people of Cuba. Behavior that was distinctly unique to the amalgamated group of people who made up the majority of the population on the island. The language of Cuba, while Spanish in origin; had a distinctly Cuban texture that eliminated traditional Spanish grammatical rules, and added influences from African dialects. Religion was also adapted to include totemic rituals espoused by both African slaves and the native *Taíno*. Remnants of that collaboration can be seen today in many *Santería* ceremonies and in music such as the *Son* style in Cuba.

In order to place the attempted adaptation of the Cuban culture by the U.S. into perspective, I first discuss the concepts of belonging, citizenship, and culture as they relate to Western cultural development. The concept of citizenship or the belonging to a group can take on several different manifestations in the Western Hemisphere. Marshall (1950-1992), Ignatieff (1993), and Brubaker (2004) have identified several ties that bind people to cultural groups in the modern perspective. Family groups, ethnic ties, civic associations, and the more recent development of the nation state and rights-based citizenship are all manifestations of modern Western-styled citizenship. While it was important to acknowledge the modern perspective of these scholars, to enter into the world of the late 19th century cultural thought, it was more important to investigate those influential individuals who dominated the discussion during this

period. In an attempt to situate myself in this historical perspective I examined the aforementioned concepts as a scholar of that time. Through examination of the essays, speeches, and texts of the scholars who led these discussions, I gained clarity on the thought behind the choices of the political and military leaders in the U.S. and Cuba in 1898.

To examine the concept of the Western citizen, it was necessary to look first to Aristotle and the Ancient Greeks. Aristotle in Book III of the Politics asserts that citizenship and belonging are intertwined as one; to be a citizen meant to belong to Athens as one who acted in the manner that denoted membership in the workings of the city. However, it was not as simple as acting like a citizen; the concept of belonging existed as well. To truly be a citizen of Athens, Aristotle stated you must be born of two citizens. Family, according to Aristotle, became the very basis for entry into Athenian citizenship.

Yet, this did not mean that once born to the city you had completed the process of obtaining citizenship. Citizenship in Athens (and other city states of Greece) necessitated a responsibility not only to one's family, but to all others in the city. Outlined in a translation of Pericles' oration by Halsall (2000), the perspective of situational ethos (character) and responsibility are clearly articulated as integral parts of citizenship. In his funeral oration following the first battles of the Peloponnesian War, Pericles extols the virtue of the citizens of Athens in his address to the surviving warriors and relatives of the fallen. Linking ancestors, parents, current citizens, and children into one assemblage Pericles points out the manifest principles of Athenian responsibility, that cannot be broken without disgrace, that conjoin the people of Athens as one (Halsall, 2000). As Riesenberg (1992) asserts, it is through the oration of Pericles that we have an initial understanding of the dual dimensions of citizenship. First there is the allegiance to the family as spoken of by Aristotle as the grounding of belonging.

Second, with the addition of the responsibility of the individual to the state articulated by Pericles, there is a dimension that establishes an ethnic belonging or citizenship to the city (Lailas, 1998).

While Greek citizenship can be defined as being both a birthright and a responsibility to the location of that birth, it suffers from the weakness of non-transferability. To be recognized as a Greek citizen you had to be the child of two Greek citizens and been born in the city of Athens, (or another city-state) according to the Greek law. Not until the Romans began to conquer the Western world did citizenship break the bounds of place and familial association. However, the Roman citizen was not a direct improvement upon the Greek model. Athenian citizens enjoyed the responsibility of self-government, or democracy. In the Roman model, citizenship was universal, available to all who swore allegiance to Rome, but conferred no rights towards self-rule (Lailas, 1998).

As Christianity expanded in the fourth century C.E. citizenship took a new tact. The individual began to rise in opposition to the needs of the state. Christianity is supportive of the rise of individual importance and puts forth a view, later explored by Rousseau (1761/1973), that there is a Sovereign outside of the realm of man that rules over-all and thus exists in control of all human forms of association. The Church required a fealty to the teachings of Christ and in turn supported the rise of the private-self (Lailas, 1998). In order to reaffirm the perspective of Christianity on the role and responsibility of the citizen, and to expand the teachings of Christ, education of children in a community slowly passed from the hands of the parents to the Church. The direction of citizenship continued on this narrow path for over a thousand years with little expansion of thought until the late 17th century. As the 17th century unfolded, two opposing points of view emerged relating to the belief that man's individuality and private-self can exist

independent of an outside force. The discussion of a tacit agreement between men as a social contract of individual rights unfolds with the increase in philosophical thought as the Age of Enlightenment began. The concept of the social contract is deeply imbedded in the idea of citizenship from the time of the Ancient Greeks; however, it is Thomas Hobbes (1588-1679) and John Locke (1632-1704) that tease out the opposing ends of the perspective.

The publishing of Hobbes' *Leviathan* in 1651 marks the end of the structured, Church-centered, concept of citizenship. Hobbes (1588-1679) argued quite vehemently that man could not exist in society without the state as a controlling entity. It is Hobbes' perspective that man is too self-centered to act in any way that does not first benefit him. Therefore, individual rights cannot exist, in so far as they must be subjugated to others in order to have other's subjugate their rights to you. Hobbes also argued that man has no inherent self-interest to subjugate his rights to others, so an overarching power in the form of a sovereign must exist to control man. Whereas Pericles boasted of the congeniality of Athenians due to their shared citizenship, Hobbes (1651/1999) asserted that the "condition of man is a condition of war of every one against every one" (p. 113). Essentially, in order for man to live in peace, he must negotiate away his basic right to do what he wants in order to not be killed. Man simply concedes his rights to the government in return for his life. Hobbes' (1651/1999) foundational argument was that without the state, man's life would be "solitary, poor, nasty, brutish, and short" (p. 110). From the perspective of Hobbes, man was an untamed animal when left to his own devices, was unable to see beyond the immediate and hampered by an innate desire to overcome all who exist in common with him. This view spurred a natural opposition to man as animal with the introduction of the concept of man as social animal espoused by John Locke.

Locke (1632-1704), in opposition to Hobbes, saw man as a social animal, who by necessity must associate with others to live in a peaceful state. The essential assumption of his argument was man has an innate desire to exist in a peaceful manner. In order to maintain this peaceful state of nature, all men recognized their equality and the necessity not to molest, in any manner, another's "life, health, liberty, or possessions" (Locke, 1690/2005, p. 8). By carefully articulating the logical precepts of a person's responsibility to the state and to other members of that state, Locke sets forth a clear delineation of the rights of the citizen. Those individuals, who adhere to these components of peaceable coexistence, exist as citizens of a common perspective. It was with the development of the rights of the individual that are aligned by common desire that Locke began the transition from ethnic to civil citizenship. One of the more important parts of Locke's (1690/2005) *Two Treatises of Government* essay was his defense of the right of property. Without the right to peaceably enjoy the fruits of his own labor, according to Locke, man has no interest in maintaining a peaceful coexistence with others. Citizenship for Locke became an agreement of coexistence where there were defined rights as well as responsibilities. It was in Locke's exploration of the rights of man that we can witness the beginnings of United States Constitution, however it takes Jean Jacques Rousseau (1712-1778) to explore how the rights of man coalesce into a sovereignty that emerges not from above the people, but from within.

In 1761 Rousseau explored the concept of citizenship from a new perspective in the years before the American and French revolutions. Up until the time of Rousseau, the notion of the state was that of an external body. While it may have included members of the citizenry of the state such as in Greece, those members came from the elite class, and ruled with relative impunity. Hobbes perspective of sovereignty was based on this older model, and it was from this

view that he placed the ownership of rights with the state or sovereign. Rousseau (1761/1973) on the other hand, asserted that this type of association between a people and a ruler would last only as long as the monarch was in power. What truly created sovereignty according to Rousseau was the community of people who had a common identity and purpose. Following this perspective further, Rousseau argued that the real power or sovereignty originated with the people who decide to elect representatives to act as their agents. With the onset of industrialization and the growth of personal property and subsequent self-interest in civil rights, Rousseau's concept of the common identity and purpose in a civil society were assailed. One of the individuals who challenged the weakness inherent in Rousseau's essay in light of the rise of the nation-state was Georg Hegel (1770-1831).

Hegel (1821/2003) in his essay *Elements of the Philosophy of Right*, established an argument that common identity and the will of the people to subjugate their individual interests to the common good was in direct opposition to the concept of free will. Working from the theoretical perspective of Locke who stressed the importance of private property, Hegel argued that only with the freedom to gain and dispose of their private property at will are a people truly free. In order to act as a citizen in the rising industrial nation-state structured world, Hegel saw the need of the individual to base their rights in the law and civil contracts. Incorporating the economy, social rights, morality, and a commitment to family was what made the citizen in the modern age according to Hegel (1821/2003).

Citizenship, as it was conceived of by the end of the 18th century, had evolved from a loose confederation of people with individual interests, to a community, with common interests and a self-originated power to rule in a collective manner. The 19th century opened with a perspective that citizenship, as practiced by the United States and France, was based on the will

of the people. Sovereignty or power emerged from the common will and representative or agents of the people acted in the best interests of the common desire.

With the approach of the 20th century, the concept of the citizen and citizenship was linked to the civil responsibility to the community, to ones' family, and to ones' self. The ability of the individual to collect private property and dispose of it at will was seen as the true possession of freedom. No longer was there a social contract through which all men negotiate for the common good. Instead, the rights of the individual to freely act in their own self-interest, within the bounds of the law and contracts, were the perspective democratic states embraced with the approach of the 20th century. The concept of citizenship had progressed over two millennia from belonging through familial or ethnic ties to a community, to the membership of the individual, through adherence to laws and contracts, to a civil state. In addition to what has been presented above is the inherent understanding that the concept of citizenship did not develop in a straight-line process. While many ideas were built upon earlier perspectives and theories, beliefs about the responsibilities of the classic citizen still persist to this day. At the close of the 19th century scholars such as Dewey continued to embrace the Aristotelian concept "that each individual citizen has a responsibility to the public welfare as well as to himself" (Lailas, 1998, p. 100).

While this review of the development of citizenship is by no means exhaustive, it does cover the important aspects of the progression of thought from the Ancient Greeks up through the end of the 19th century. Several additional scholars and philosophers would have been reviewed in an exhaustive analysis of citizenship. Perspectives of citizenship such as those espoused by Machiavelli (1469-1527), Montesquieu (1689-1755), and Adam Smith (1723-1790) to name a few, would have added to the overall discussion. Each of these scholars, and many

others, added to the totality of the concept we call citizenship today. However, this study is not intended as an examination into the development of the concept of citizenship. The concept of citizenship was explored here, to establish a foundation of thought similar in nature to what scholars of the time under study would have embraced as they developed their own perspective of citizenship and belonging to the new concept of nation-state.

Culture

While it is easy to trace the development of the concept of citizenship back to the ancient Greeks, the concept of culture, due to the use of different terminology and fields of research by scholars, is a little more difficult. Early definitions of culture were wide ranging and had little in common with modern perspectives. According to Logan (2012), one of the earliest attempts to collect culturally significant components of a people was performed by the Roman poet Lucretius (99-55 BCE). Lucretius recounts the story told by Epicurus, a Greek philosopher better known for his self-directed lifestyle, titled *The Way Things Are*. In this recollection, Lucretius tells of the development of social groupings and attempts to explain beliefs held by ancient peoples, especially those of supernatural beings. Logan (2012) also explains that in a manner similar to what happened with the concept of citizenship; Christianity's version of social construction in the book of Genesis eclipsed that of earlier philosophers. Logan (2012) also examined the work of Giambattista Vico (1688-1744) and other 18th century philosophers who presented a vision of reality that was in direct opposition to the Church. These scholars began to examine the development of language as crucial to the development of man. According to Vico, as language became more sophisticated so did Man's attempts to describe the world around him. While still speaking of society and civilization, the age of enlightenment philosophers began to

examine reason and metaphysical belief in their exploration of how language was used to explain reality (Logan, 2012).

Nineteenth century exploration into the nature of man came into full force with the release of Charles Darwin's (1809-1882), *On the Origin of the Species* (1859). Darwin's seminal work exploded the existing paradigms of anthropological thought and forced his field to reexamine the entirety of their thinking. However, this conflagration did not stay contained to anthropology; almost every other field of scholarly thought was caught up in the examination of their current perspective. Shortly after the release of *On the Origin of the Species*, Edward Tylor (1832-1917) presented a work on culture that realigned thought of the late 19th century regarding this emergent topic. Titled *Primitive Culture: Researches into the Development of Mythology, Philosophy, Religion, Art, and Custom*, Tylor's work was released in 1871. Tylor presented, on the first page of his two volume work, a definition of culture that still holds much accuracy today, and was most assuredly the perspective of culture held by many educated men and women at the end of the 19th century: "Culture or Civilization, taken in its wide ethnographic sense, is that complex whole that includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society" (Tylor, 1871, p.1). Sufficiently broad to accommodate many perspectives, Tylor established the first modern age definition of what we call cultural identity today. According to Logan (2012), Tylor saw anthropology as a "science of culture", a methodological process by which human behaviors could be categorized (p. 1). However scientifically Tylor viewed culture, Logan (2012) explains that he did not recognize the plurality of culture, and assumed one standard culture existed for all of mankind. Examining Tylor's perspective on this concept is made easier if we recollect that Darwin's theory was also a universal perspective. As the 19th century came to an end, cultural theory was

bounded by the work of Tylor (1871), and the perspective that all humans followed the same cultural paths. In the century and a half since Tylor's (1871) work was published numerous scholars have attempted to define culture. Few have succeeded to the extent he did with those 35 simple words noted above.

Acculturation and Assimilation

An often stated dictum amongst anthropologists of the late 19th century regarding culture and transmission of customs was the understanding that there were two distinct classes of people. McGee (1898) articulated this position clearly in his essay on Piratical Acculturation, and defined the two levels as the "higher culture-grades" that exist in the civilized and enlightened peoples of the world, and the "lower culture-grades" who exist in savagery and engage in barbarous behavior (p. 243). The emergence from barbaric behavior to an enlightened mind was seen by McGee as a process of a lower culture-grade group mimicking the behaviors and customs of a higher culture-grade group. Interaction between the two cultures was seen in a linear pathway, with changes to customs flowing from the more advanced to the less advanced peoples. McGee (1898) argued that acculturation was "essentially social, and may be measured by the degree in which devices and ideas are interchanged and fertilized in the process of transfer" (p. 243). Acculturation, as envisioned and presented by McGee (1898), had four distinct layers, with the top layer having the most importance to peaceful transmission of ideas. In the first two layers, acculturation of one group by another occurs through structures of war and marriage. The third layer exists in the expansion of trade and the rudiments of economic interaction. The final layer of acculturation, and the one I am most interested in this study, was defined by McGee (1898) as "the spontaneous interchange of ideas for the purpose of increasing human power over nature; it may provisionally be styled educational acculturation" (p. 249).

A process of “acculturation” or the changing of one culture through exposure to another was first used by Powell (1880) in an essay on Native American language usage. Three years later, Powell (1883) defined acculturation, in his annual address to the Anthropological Society of Washington D.C., as a “subjective adjustment of the lower to the higher” (p. 206). However, Powell was not speaking solely of cultural transformation, he was speaking of an adaptation, a learning process that can occur just as often within a people as it can between peoples. In this address, Powell (1883) presented an integrated concept of three agencies that work together to inform a people of their own customs: “Invention, acculturation, and instruction” (p. 207). Through these three activities, man’s “psychological evolution” occurs, he is made accustomed to the activities of his culture and learns through dedicated instruction intended to impart the knowledge of his people in him so he can enter the group as an equal (p. 207).

In support of work on acculturation and assimilation, Simons (1901) crafted a five volume exploration of the 19th century understanding of the amalgamation process of Europe that she presented as the processes of assimilation. In her voluminous work are numerous perspectives on acculturation as it was explored by European scholars, however three stand out as important to my study. In the first, Simons (1901) asserted that assimilation is a long process that “may, perhaps, be defined as that process of adjustment or accommodation which occurs between the members of two different races, if the contact is prolonged and if the necessary physical conditions are present” (p. 791). In the second perspective, Simons introduced the concept of denationalization, and asserts that it can be equated with assimilation. In her concept of denationalization, Simons (1901) argued that this process can only be accomplished through a government, and is the process of “inducing a population to abandon one type culture for another” (p. 791). In this method, assimilation is coercive and is accompanied by government

imposed violence. The third is the assertion that “In modern times the political union of different races under the leadership of the dominant race results in assimilation” (p. 791). Here Simons (1901) was continuing the argument of unidirectional acculturation, ignoring the bidirectional features of cultural transmission alluded to by Tylor (1871) and McGee (1898). It is in the second assertion of Simons that we can clearly begin to see the workings of the U.S. intervention into the Cuban system of education. The coercive nature of the assimilation process is muted through the introduction of cultural transformation at the school level; however, the violence that the U.S. initiated during the Spanish American War provided evidence to the Cuban people of the might of the American government.

The acculturation discussion, at the end of the 19th century, was controlled by the perspective of dominant and subordinate cultures, of higher and lower societies, and by the unidirectional ideology where one culture learns from a more advanced neighbor or conquering culture. All three of the main influences on acculturation scholarship from this time period, available for review today, are in agreement that education was an important aspect of assimilation. McGee (1898) argued that the highest level of cultural transmission was through the concept of “educational acculturation” (p. 249). Powell (1883) saw education as the main means of acculturating a population in the methods and customs of an existing society. According to Simons (1901) education was the “attractive method” that allowed for “absolute toleration in regard to language, religion, and custom for individual use” (p. 812). Enmeshed with this concept of education was the unstated belief that acculturation was positive for the subordinate culture and had little to no effect upon the dominant culture. It was with these perspectives of cultural transmission and assimilation firmly ensconced in scholarly thought that educators began the 20th century. Taking all of the thought available at the turn of the century

regarding adapting a people's culture, it is difficult to understand why the process of cultural adaptation in Cuba met with such difficulty. To add clarity to this discussion, I next explored the unique aspect of *Cubanidad* to help illuminate why the cultural assimilation of Cuba struggled to achieve its result. Following the presentation of the concept of *Cubanidad*, I introduce transculturation as it is perceived by Ortiz (1947) to help clarify the effect of *Cubanidad* and the weakness of the existing thought at the end of the 19th century regarding cultural transmission.

Cubanidad

When performing research on Cuban history or social issues, one factor immediately comes to the fore as a necessity to enhance understanding of Cuban behavior, the concept of *Cubanidad*. *Cubanidad* loosely defined as Cubanness is, as Ortiz (1949) asserts, the essence of being Cuban. However the concept does not end there, on the contrary, the complexity of *Cubanidad* extends to every aspect of Cuba, the people, music, religion, food, thought, self-image, education, politics, etc. The uniqueness of location, of geography, of place in time and space have helped develop what it means to be Cuban, as has the events that have been perpetrated against the people of the island. As the definition implies, even the sense of what *Cubanidad* is changes as the people, places and things of Cuba change through time. Ortiz (1949) initially sets aside the more integrated definition of *Cubanidad* at the commencement of his essay stating that for now, *Cubanidad* cannot be defined except as a relationship of belonging to Cuba. *Cubanidad* then is a broad subject, one that needs much attention in order to be marginally understood, and perhaps a lifetime of personal experience to really embrace.

One of the simplest definitions of *Cubanidad* is nationality. If you are born on Cuba, or become a Cuban citizen, you can meet this simplest threshold --- you are essentially Cuban. The place of birth as indicative of citizenship has become an issue of contention between those who

have left Cuba, and those who remain. Some of those in political power in Cuba assert that those who have left can no longer claim membership to the island. Essentially they have been stripped of their Cuban citizenship by political means. Those who have left the island argue (equally vehemently) that *Cubanidad* is not associated with the island, but resides within the people. The duality of this issue is described by Pérez-Firmat (1997). In his essay on the difficulty of being both Cuban and American and neither individually, he recounts a discussion between Jorge Mas Canosa (1939-1997), head of a powerful Cuban lobbying group in Miami, Florida, and Ricardo Alarcón (1937-), a prestigious member of the Cuban government, about acceptance, one by the other, as future leaders of Cuba. Mas Canosa states that he would accept Alarcón, however, Alarcón answers that he would not accept Mas Canosa as a leader of Cuba since he is no longer Cuban. According to Pérez-Firmat (1997), this is the narrowest vision of *Cubanidad*, nationality or belonging as defined by membership to a state. Citizenship simply stated in a manner similar to the Ancient Greeks concept of belonging to a city-state, a citizenship that in the case of Cuba is decided by the political party in power.

Alarcón's argument defines citizenship in the narrowest and most transitory sense. To belong to a culture or country one must reside in that place. In the exchange between Mas Canosa and Alarcón, the aspect of identification, who is Cuban and who is not, is decided based on official citizenship. More importantly, as pointed out by Pérez-Firmat (1997), is the power associated with this decision. Both men were born in Cuba; one no longer resides on the island. The ability to claim *Cubanidad*, in this definition, becomes tied to those who remain on the island; rather than belonging to the individual, it is owned by the state.

The physical construction of Cuba has a lot to do with the concept of *Cubanidad*. Most people would think of Cuba as an island, however, when examining the landmass closely, it is

apparent that there are a cluster of islands, one very large, surrounded by hundreds of smaller islets and cays. In effect, Cuba is an archipelago. As Ortiz (1949) points out, it is this configuration, the main island at the center surrounded by smaller less significant islets that adds to the whole of Cuba. While not the first Spanish possession in the Caribbean, Cuba became the most important and was the central *entrepots* to the region. As de Arrate, (1876) noted, Cuba was the key to the new world for the Spanish. Ships coming from Spain to the New World made first landfall on Cuba. Those returning to Spain laden with plunder from the Americas made their final stop, before traversing the Atlantic, in Havana's harbor. Bestowed with this importance, and by the mid-19th century, one of two remaining Spanish colonies in the Caribbean, Cubans historically have seen themselves as part of a special location and a unique people.

The geography of Cuba is a feature that exists in most every discussion of *Cubanidad*. The isolation of the island, the surrounding water, the fertile soil, blessing rain, and intolerant sun all blend together to produce what Virgilio Piñera (1912-1979) identified in 1943 as an all-encompassing inescapable force in his poem, *La isla en peso* (The Whole Island) (O'Neil 2007). Piñera sees the island in a manner similar to a prison where the inmates dance around the perimeter in a circular fashion, baked by the sun, and isolated from the remainder of humanity with no possibility of escape. Each day provides the same things, the smell of the morning rain, the midday sun, and the humid night. The baking of the sun takes away all thought from the inhabitants who struggle to know if they are Spanish, Cuban, African, American, or something that includes all of the above or nothing at all. In *La isla en peso*, the island takes the form of a person's body, where we are all trapped, unable to truly experience something other than what

we are. Piñera is asserting that for Cubans who reside their entire lives on the island, this experience is *Cubanidad*.

While not presented as darkly as Piñera, Ortiz (1949) in *Los Factores Humanos de Cubanidad* (The Human Factors of Cubanness), also speaks to a great extent about the isolation or insularity of Cuba. According to Ortiz *Cubanidad* emerges from the soil of the island and is embedded in the souls of those who live there. Ortiz argues it is not enough to have seen your first sun on the island; to experience *Cubanidad* is to experience the rain, sun, breezes, and mother earth of the island. While the phrase that Ortiz uses in Spanish loses something in the translation to English, the intent is to say that *Cubanidad* can only be experienced by *living within* (my emphasis) the concept that is Cuba. I would add to this that living within the concept of Cuba is situational, both in time and in class. The experiences of someone who lived in the upper class of the mid 1800's would have been different than those who lived through the late 1950's middle or lower classes. To live within the concept of *Cubanidad* therefore would have been diverse and the same concurrently for the people of divergent economic and cultural classes and for those living in different times.

Many scholars see the origin of *Cubanidad* having its origin with José Martí (1853-1895) in his definition of a national identity forged from the two major groups living in Cuba, Africans and Europeans. In *Our America* Martí (1891) speaks to the constructed nature of the Cuban culture. He argues that to impersonate other cultures to the abandonment of the uniqueness of Cuban culture ignores what is special about being Cuban. Here he is not just speaking to the different races that inhabit the island, but to the divergent intellectual ideologies that have joined in Cuba to create the unique perspective of Cuban thought.

Cuban poet Nicolás Guillén (1902-1989), follows Martí's vision of a constructed nationality of diverse peoples with his work *Balada de los dos abuelos* (Ballad of the two grandfathers). Guillén's (1934) two grandfathers, one European, one African, join their different blood in the poet, creating a new nationality, Cuban, containing what Martí asserts in *Our America*, as white and black, oppressor and victim in one body, one people (Martí, 1891). Much can be said about both Martí's and Guillén's perspectives about *Cubanidad*, their views express the spiritual mixture of "race" as a part of the malleable aspect of belonging that occurs on Cuba.

With the perspective of *Cubanidad* opened, I move on to the concept of *Cubanía*, before returning to a further discussion of *Cubanidad*. *Cubanía* was a term coined by Ortiz in a speech given in 1939. Following the lead of Miguel de Unamuno (1864-1936) the Spanish philosopher who deftly crafted the distinct difference between *hispanidad* and *Españolidad*, Ortiz coined a new term to better describe the concept of belonging to Cuba. Where Ortiz established the distinction between the generic attribute of *Cubanidad* and the individual virtue of *Cubanía*, Unamuno had left behind a term that was antiquated in describing people of Spanish descent due to the scattered nature of Spanish possessions (Unamuno, 1927). In the creation of this word Ortiz made a distinction between the aspect of *Cubanidad* by birth, and that of desire. *Cubanidad*, linked with the physical aspects of nationality and birth, did not approach the heights Ortiz was attempting to describe. He envisioned two distinct aspects of *Cubanidad*, the corporal existence as Cuban, and the intellectual or spiritual essence, *Cubanía*, of wanting to be Cuban. *Cubanía* then was seen by Ortiz as the deep desire to belong to Cuba, not just physically, but on a spiritual level, where body, soul and island are merged in one being. Since the essence of *Cubanidad* for Ortiz (1949) was located within the person, he would not agree with Alarcón's

present day assertion that to be Cuban simply requires a certificate of citizenship issued by a government authority.

Pérez-Firmat (1997) presents the concept of *Cubanía* as a deeper aspect of *Cubanidad*. Perhaps because Pérez-Firmat was an exile from his native Cuba, he had worked to expand the concept of *Cubanidad* beyond that of Ortiz. One can have *Cubanía* and never have set foot on the island of Cuba according to Pérez-Firmat (1997). According to Pérez-Firmat (1997), *Cubanía* is the living culture of Cuba. *Cubanía* exists in the Cuban speech, language, thoughts, actions; it is the interstitial space between *ser y querer ser* (to be and to want to be). Within this perspective of *Cubanidad* there is also the nostalgic retrospective view, the want to be what it was before, or what I re-imagine it to have been. It is here that the exile's perspective returns to the island and finds itself still embodied amongst those who knew of Cuba in a time before the present day structure of society. *Cubanía* then becomes a *Cubanidad* of the mind or as Ortiz (1949) said: of faith, hope, and love. It is with the combined perspective of Ortiz and Pérez-Firmat tentatively held that I next explore the concept of transculturation before continuing my examination of civics education, Cuban history, education, and cultural development.

Transculturation

My earlier exploration of acculturation was set much closer to the time period under discussion in order to hold to my intent of developing period-based knowledge. It is in this manner that I explored the concept of transculturation. Although the discussion on acculturation was well underway by the close of the 19th century, it was not until 1940 that Fernando Ortiz coined the term transculturation. During the early part of Ortiz's exploration into the concept of *Cubanidad*, he confronted the problem of attempting to define the relationships and transitions that had been underway in Cuba for five centuries. His struggle was in attempting to define what

he observed occurring on the island of Cuba with the available terminology currently being utilized in emerging anthropological scholarship. To overcome his conundrum in 1940 Ortiz coined the term “transculturation” in a work entitled *Contrapunteo cubano del tabaco y el azúcar* (Cuban Counterpoint of Tobacco and Sugar). He crafted this neologism in an attempt to better express the cultural blending that had occurred and continued to transpose during Cuba’s history. This work soon became available in English when it was translated and published under the title *Cuban Counterpoint: Tobacco and Sugar* in 1947.

In this work Ortiz (1947/1995) explored the history of Cuba as it related to the clash of divergent cultures. Recognizing the importance of including the original inhabitants of the island, Ortiz does not start with the mingling between the European and island culture, but begins with the interaction between the *Siboney* and the *Taíno*. These different cultures initially clashed, but then existed together on the island for several hundred years before the arrival of the Spanish (Gott, 2004). However, with the arrival of the Europeans the *Siboney* appear to disappear, unable to remain a distinct culture apart from the *Taíno*. The *Siboney* culture was in effect subsumed by the *Taíno* and quickly disappeared as the original inhabitants of the island die off, or relocated away from the arriving Spanish (Gott, 2004). Ortiz (1947/1995) suggested that the arrival of the Spanish was not the entrance of a homogeneous group to Cuba, but instead the mingling of several similar but distinct Iberian cultures transported from their homes to a new location. Added to this mixture are the Africans stolen from their homelands and transported to the island to act as slaves for the conquering Spanish. Meshed within these three divergent cultures are the natives of the surrounding islands and those of North America who were also captured to work as slaves (Gott, 2004). However, it was not only as slaves that the Spanish viewed the native population. Gott describes the emerging mestizo or mixed population

extant in Cuba during the 16th century as the result of “Spanish males satisfying themselves with Indian women” (p. 22). So pervasive was this practice that by the census of 1514 the percentage of native women officially recognized as wives of Spanish men had reached 40% (Gott, 2004). As all of these different people came together, their cultures mixed, and a new way of living emerged, one distinctly Cuban. This is what Ortiz (1947/1995) asserted should be recognized as the cultural transmission underway in Cuba, a transfer of habits and behaviors, not an assimilation as was the then current definition of acculturation.

While I have chosen to move forward in time from the end of the 19th century into the late 1930's and early 1940's, the adjustment was necessary in order to fully experience Ortiz's (1947/1995) original concept of transculturation. During the latter part of the 1930s the term acculturation had emerged as a means to define the cultural transmission from one group of people to another (Redfield, Linton, and Herskovits, 1936). The term was more times than not utilized to indicate that a dominant culture had assimilated a less dominant group, with the near total erasure of the minority group's cultural identity. The scholarship that supported this perspective was put forth by Redfield, Linton, and Herskovits (1936) in their *Memorandum for the Study of Acculturation* sponsored by the Social Science Research Council. By outlining their proposed research these authors formalized several aspects of acculturation that formed the basis of the theoretical discussions of that time period. In order to bind their proposed research and in an attempt to formalize their view they established the definition that, “Acculturation comprehends those phenomena which result when groups of individuals having different cultures come into continuous first-hand contact, with subsequent changes in the original cultural patterns of either or both groups” (Redfield et al, 1936, p. 149). Discussing the results of acculturation, Redfield et al. established three areas that described their expected results: acceptance, which

entails one culture taking over another with the loss of the majority of the subsumed groups cultural behaviors; adaptation, where the two cultures combine to establish a “smoothly functioning cultural mosaic” that was only tested in times of difficulty; and reaction, where a culture that has been repressed is brought to the fore either through the pride of resurgence or as “compensation for an imposed or assumed inferiority” (p. 152). For Ortiz (1947/1995) the concept of acculturation, especially as it was defined by Redfield et al. was limiting in its scope, particularly since it defined a binary relationship of two cultures, one that was in most instances inferior to the other.

Instead of acculturation, Ortiz (1947/1995) offered the neologism of transculturation to “express the highly varied phenomena that have come about in Cuba as a result of the extremely complex transmutations of culture that have taken place here” (p. 98). As the main gateway to the Americas, Cuba witnessed the migration of millions of people through her ports. Some of these travelers stayed only a short period on their way to the mainland, others chose to remain in order to fulfill their dreams of a life “with all the comfort that we wish for them” as the Spanish King had declared was their right (Gott, 2004). It was this transfer of culture that Ortiz (1947/1995) recognized as the main component of Cuba’s cultural makeup.

Rather than a slow adaptation from one culture to another as in Redfield et al.’s Acceptance process, transculturation expresses the often rapid and repeated change from one cultural force to another. Cuba over the centuries was witness to several rapid transformations through the influx of *encomenderos* (holders of a Spanish Royal Decree permitting profit from slave labor in a specific area), slaves, immigrants, adventurers, occupiers, and with the advent of the industrial age, U.S. industrialists. As each group arrived their cultural components were brought with them to the island. It was this uprooting on of culture that according to Ortiz

(1947/1995) results in a new culture, built from parts of the previous cultures, but holding firmly to neither, instead creating a new and unique adaptation.

Together with the concept of *Cubanidad*, it is now clearer how the Cuban culture developed apart from that of their Spanish heritage. Transculturation links the ideas of culture, acculturation, and the development of a polymorphous culture such as that of the Cuban people. Crafted from the influx of many divergent peoples, yet bound by the sea onto one island, the Cuban people emerged over time, sometimes with rapidity, at others with slow often plodding change. However, it is Ortiz's (1947/1995) recognition of the unique construction process that allows for a deeper understanding of how the Cuban people began to form themselves apart from the Spanish, and never embrace fully any entering cultural force.

Civics Education

Prior to transitioning from the situational perspective development of belonging and citizenship in the review of literature, I will briefly situate the concept of civics education as it existed at the close of the 19th century. Civics education has a long history, also dating back to the ancient Greeks. One of the earliest discussions on the topic of civics education comes to us from Plato. In his work on *The Laws*, Plato pointed to the importance of education of the populace in order to make them good citizens. Without an understanding of the laws of the city, citizens would not be in benefit to the polis (Plato, 360 B.C.E./1997, 641b7-10). Therefore, in order to ensure that the citizens of the state were good civic minded individuals who understood and obeyed the laws of the city, they must be taught to read and comprehend the laws. It is in this manner that education is aligned with the creation of the citizen and civic virtue.

Throughout the majority of time between the Ancient Greeks and the late 18th century, civic education was seen simply as a modeling of proper behavior, and was designed principally

for adult males. Children (almost exclusively boys as girls were rarely educated at this time) were inculcated in the workings of civic behavior in Latin-based cultures through the use of religious education. Often this religious tutoring took on the form of morals education or through transmission of the Christian doctrine in the church. No formal schoolroom education in civics per se existed, although both Rousseau and John Stuart Mill (1806-1873) speak at length of the necessity of civic and political education for the common man. Not until Horace Mann's (1796-1859) idea of the common school entered into existence that a venue for common civics education was remotely possible. Prior to this time, schools consisted of private entities with entry restricted to those who could afford the fee for admission, or who were adherents to a particular religious ideology. Once the common school was established, and all students could be educated regardless of their social standing or religion, the teaching of civics became a primary responsibility. According to Crittenden (2011) a simplistic and explicit civics education curriculum was a part of the common school's practice. The intent of the civics education was to "create good citizens and good persons" this process "required little beyond teaching the basic mechanics of government and imbuing students with loyalty to America and her democratic ideals" (Para 1.4). As a part of the assimilation process in the common school's attempt at creating uniform citizens, Crittenden (2011) cites a high adherence to Protestant ideology at the expense of other religions, mainly Catholicism. This in turn led to the development of religious schools managed by the Catholic Church and a few Jewish Temples.

During the period between 1840 and 1890, few changes in civics education appear to have been made in the method of transmission and the content used. Most schools that included civics education in their curriculum relied on texts that "tended to be 'constitutionally' oriented, that is, primary emphasis was on the exposition of the Constitution with little if any space given

over to other aspects of government” (Hemenway, 1969, p. 27). Hertzberg (1981) reports the figure of 5% of the pupils attending school in Ohio as taking government classes in 1882. It is fair to say this approximation could be extrapolated across the entire U.S. with little loss to the accuracy of the percentage. Transmission methods were focused entirely on rote memorization at all levels of the school, the belief being that if a student could recite the Constitution, they were prepared to engage as properly prepared citizens (Hemenway, 1969).

In the period following 1890, civics texts used in the classroom began to focus more on the civil aspects of the national government, with the inclusion in some books of state, city, and municipal government organization and processes (Hemenway, 1969). The years leading up to the turn of the century are rife with dramatic changes in civics education. These changes were brought on by the rapid influx of immigrants from southern and eastern Europe and East Asia, and the growth of professional associations such as the ASSA (American Social Science Association) and the AHA (American Historical Association). Saxe (1992) cites the earliest call for citizenship education in the schools as having been made by Carroll D. Wright, the first U.S. Commissioner of Labor, and an ASSA member, in 1887. Social education, as it was known at the time, focused on the development of a school curricula devoted specifically to social science and citizenship (Saxe, 1992). As civic education began to gain ground in the late 1890s, many of the educators who would be influential in the early 20th century were steeped in the understanding that the school was the venue for the adaptation of the immigrant, and the native born child, to the ways of U.S. citizenship.

Starting almost with the onset of the 1890s, several influential reports on education began to make their way from the confines of academia into the public venue. The first was the Committee of Ten report in 1893. Led by Charles Eliot (1834-1926), then President of Harvard

College, the Committee of Ten held several soon to be notable names in its roles. Albert Bushnell Hart (1854-1943), Woodrow Wilson (1856-1924), and James Harvey Robinson (1863-1936) were joined by additional men who came from the ranks of colleges, universities, and secondary schools (Hertzberg, 1982). The committee's recommendations for elementary and high school curricula contained substantial time devoted to social studies, including government or civics education (Hertzberg, 1982). Civil government rated special mention in the committee's suggested curriculum with the direction that it be taught separate from history courses and contains "constant references to foreign systems" (Hertzberg, 1982, p. 11). As the century came to a close, a second report on the importance of social studies and history emerged from the Committee of Seven in 1899. Made up of scholars no less influential than the Committee of Ten, the Seven (as they became known) expressed similar perspectives as did their earlier counterparts. However, their focus on the added importance of civics education as an allied subject to history was the final impetus that helped lead to the use of civics education in high schools across the nation (Hertzberg, 1982).

One last notable mention regarding civics education is necessary before delving into a review of the history of Cuban education. Working as an instructor of the New Paltz Normal School in New Paltz, New York, Wilson Gill (1851-1941), developed a system of civic practices known as The School City. The popularity and effectiveness of the School City soon had Mr. Gill resident in Cuba as an employee of the U.S. Military Government. His charge from Governor General Leonard Wood (1860-1927) was to introduce American citizenship education to the students in Cuban schools. In the course of his employment over 3000 School City Programs were established in Cuba (Hanna, 1902a).

Through a review of the concepts of belonging, citizenship, culture, acculturation, transculturation, *Cubanidad*, and civics education as it existed prior to the end of the 19th century; I have attempted to situate my study in the historical period under review. In what follows I examine the history of Cuba, the history of colonial and 19th century Cuban education, and the interest the U.S. had in the annexation of Cuba. In addition I review the impact of José Martí, American intervention in the Cuban education system, and the changing conditions at the onset of American occupation. It is through the foregoing historical review that I situate my study at the end of the Cuban War for Independence and the onset of the American Occupation and Intervention of the island of Cuba.

Early History of Cuba

Nestled 90 miles south of the Florida Keys, Cuba was “discovered” in 1492 by Christopher Columbus. At the time of Columbus’ arrival he encountered two groups of native people living on the island: the *Taíno* who were skilled in agriculture and fishing, and the *Siboney*, called *Ciboney* by Pérez (1995), who, according to Gott (2004) “acted as a servant class” to the *Taíno* (p. 12). For several hundred years before the Spanish explorers arrived, the island was home to these two peoples. There is some disagreement in the literature regarding the lineage of the *Siboney*, with Pérez (1995) indicating that the group is separate from the *Arawak*, and Gott (2004) stating they were part of the wider *Arawak* people. Regardless of this divergence of origin, the *Taíno* and *Siboney* fought fiercely against the Spanish incursion. All of the *Siboney*, native to the island, are gone, and only a few *Taíno* remain in Cuba today, all in *Oriente* province at the eastern end of the island, to educate us of their history in the time before Western incursion.

Little is known of the habits and practices of these early inhabitants of Cuba except for entries in the diaries of Bartolomé de las Casas (1484-1566) (Pérez, 1995). From his writings, we know that the *Taíno* did not succumb to the Spanish incursion easily. Despite initial contacts in which the *Taíno* welcomed the Spanish newcomers and Columbus spoke in his journals of a well-structured and ordered society, subsequent settlers quickly sought to enslave the natives (Pérez, 1995; Gott, 2004). Conditions under the Spanish were so harsh that many *Taíno*, when all hope appeared lost, chose suicide, for themselves and their families, as the only alternative to slavery (Pérez, 1995; Gott, 2004). The most famous of the *Taíno* chiefs, *Hatuey*, defied the Spanish right up to his death, preferring to go to hell, rather than the heaven of the Spanish conquerors (Gott, 2004). The subjugation and eradication of Cuba's native population didn't end with slavery. The forced "marriage" of native women to Spanish settlers sealed their fate as a "separate" people. What knowledge about the *Taíno* culture they had to share with their children soon became lost to the education practices of the Spanish Crown and the Catholic Church.

The fierce independence of the *Taíno* who refused to endure subjugation under the sword of Spain did not die off with the native population, but instead emerged in the Cuban born subjects of the Spanish Crown. During the colonial era, and the time under U.S. occupation, *Cubanidad* was evidenced by the pride of independent thought and actions for freedom voiced by the Cuban people. The concept of *Cubanidad*, or Cubanness drives the island forward today despite the poverty and deprivation evident on the island. The pride of enduring hardship and independence in the face of adversity, established centuries before by the original inhabitants of the island is an example of *Cubanidad* in today's Cuba.

Slavery finally ended in Cuba in 1886. However, the divide between Cuban born children of Spanish parents, creoles or *criollos*, and those who were born in Spain, the *peninsulares*, was reinforced through official actions by the Spanish government. The “racist society” described by Brenner, Jiménez, Kirk, & LeoGrande (2008, p. 3), gave choice government and social status to those whose skin was white in color, and had been born in Spain. The bifurcated society also extended to education; children of Afro-Cubans rarely attended or had access to public schools (de Quesada, 1905). The racial structure of the island established three levels of society: the “white” *peninsulary*, the white and *mestizo* or mixed *criollo*, and the Afro-Cuban groups. Over the five centuries since Cuba was encountered by the Spanish explorers, the inequality engendered by the unequal distribution of wealth, access to social status, and political control over their futures, led to the development of strong feelings of independence for *criollos* and Afro-Cubans.

It is this fierce independence, exemplified by *Hatuey*, the *Taíno*, African slaves, and the native-born *criollos* which has defined the struggle for autonomy and self-rule desired by the Cuban people over the past five centuries. This yearning for an independent Cuba also directed the establishment of schools on the island, including the founding of the University of Havana in 1728 (de Quesada, 1905; Pérez, 1995). Despite the almost constant occupation of their island by foreign forces, the Cuban people have retained and embraced their unique sense of self. The experience of being Cuban, of struggling against foreign occupation, led to a series of revolts and attempts at independence. Finally freed from the yoke of Spanish colonialism in 1898, Cuba had to endure almost 30 years of attempted annexation by the U.S. through the reconstruction of its school system and the reeducation of its teachers. Another 31 years passed before Cubans established an independent state. Even then, after the 1959 revolution, the island struggled

forward under the patronage of the Soviet Union. It took the collapse of the Soviets in 1989, and surviving through the “special period” (1991-1999) for Cuba to emerge as a country in charge of its own destiny (Pérez, 1995). During all of this time, it was the dogged determination, the sense of independence, of being Cuban that allowed them to overcome each adversity they faced.

Early History of Education in Cuba

Over five hundred years have passed since the island was encountered by the Spanish. The majority of that time Cuba was under the rule of Spanish monarchs. Within 30 years of the “discovery” of the island, formal education began to emerge under the control of the Catholic Church (de Quesada, 1905). The earliest recorded school in Cuba was authorized by the Papal bull of Adrian VI in 1522, through this edict; a new school called the *Scholatria* was formed in Santiago de Cuba specializing in instruction in Latin (de Quesada, p. 268). Education in early Cuba was confined almost exclusively to the children of those who could pay for it. Simply put education was only available to the wealthy “who could afford to send their sons to school” (de Quesada, P. 267). Free public education was virtually unheard of at this time in Europe; and in Cuba “public instruction was practically ignored” (de Quesada, p. 267).

Beginning with the advent of the 17th century, public education soon became a topic of discussion amongst the elite in the growing Spanish colony. In 1603, residents of Havana voted to authorize a salary of 100 ducats for a teacher to instruct students in grammar (de Quesada, 1905). In 1607 citizens of Havana, Cuba paid a portion of the costs to found and manage the Tridentine Seminary which presented lessons in Latin, morals, and later philosophy (de Quesada, 1905). As the century drew to a close, the College of San Ambrosio was established in Havana. Designed to “prepare young men for the church”, the 1689 founding of this college included 12 scholarships (de Quesada, 1905).

As the 18th century began, a desire for social and cultural independence from Spain was brewing on the island. Improvement in education was at the forefront of the concerns of Cubans as it would indicate that Cuba had exhibited “evidence of cultural diversity and sophistication” (Pérez, 1995, p. 68). In 1717, supported by a donation of \$40,000 from a citizen of Havana, Don Gregorio Diaz Angel, the University of Havana development began. The people of Havana had sought the development of a college in their town since 1656, but it took until 1717 before serious consideration was given to the project and four more years to obtain the proper license to open the college (de Quesada, 1905). Opened under the name of the College of San Ignacio in 1728, and merged with the older seminary college of San Ambrosio, the fledgling university had yet to fill all of the necessary teaching positions by the time it began accepting students in 1728 (de Quesada, 1905).

Higher education began to pick up steam on Cuba with the founding of the Colegio of San Francisco de Sales and several seminaries established by the end of the 1700’s (de Quesada, 1905; Pérez, 1995). As the late 18th century unfolded and the winds of reform were sweeping over Spain, Spanish interest in Cuba renewed, and the Cuban *Sociedad Económica de Amigos del País* (Economic Society of Friends of the Country) emerged as the guiding hand over the island’s education practices (de Quesada, 1905; Gott, 2004; Cruz-Taura, 2008). Bolstered by the Cuban newspaper *Papel Periódico de La Habana* which began publishing in 1791, and the *Real Consulado de Agricultura y Comercio*, interests in things Cuban became the focus for those who were born on the island (Pérez, 1995; Gott, 2004; Brenner et al., 2008). Unfortunately, outside of the cities education of the general populace did not transpire at anywhere near the level it was occurring in the cities of Cuba (de Quesada, 1905).

The *Sociedad Económica* was essentially the first Board of Education Cuba had seen. Their interests and responsibilities ranged from primary education up through the development and funding of the universities. Founded by Don Luis de las Casas (1745-1800), a name widely remembered by Cubans due to his familial relationship to Bartoleme de las Casas of the 16th century and a famous governor in his own right, the *Sociedad* was chartered by a royal order on the 15th of December of 1792 “with the care of education in Cuba” (de Quesada, 1905, p. 270). One of the first acts of the *Sociedad Económica* was a census in 1793 of the primary schools in Havana (de Quesada, 1905; Perez, 1945). According to their inventory, 39 schools were found 32 of these enrolling girls only, with reading as the only instruction presented (de Quesada, 1905). A second census taken in 1801, identified 71 schools, with over 2,000 students enrolled, few of which were under government control and most of which were little more than day care type facilities (de Quesada, 1905).

The key figure in education at the turn of the 18th century was Bishop Juan José Díaz de Espada y Landa (1756-1832) of the Catholic Church (Cruz-Taura, 2008). Under his leadership, and through his association with the *Sociedad Económica*, several public schools were opened, including institutions for girls. However, perhaps his biggest contribution to Cuban education was his belief in the abilities of Félix Varela (1788-1853). Varela was a nineteen-year-old seminary student who helped rework the Cuban education system to include modern perspectives such as teaching classes in Spanish instead of Latin, and introducing Spanish Law to supplant Roman legal studies (Cruz-Taura, 2008). By 1816, a separate education section was formed within the *Sociedad*, which received official support from Havana’s government. Given marginal funding at this time, the *Sociedad* began to improve education for the poor and instituted free public education with help from the Catholic Church (de Quesada, 1905).

As part of the *Sociedad's* work in higher education they expanded the courses available at the University of Havana. Indicative of the shift from European centered courses, to those with a focus on Cuban interests; these changes appeared first in the study of philosophy and the introduction of a new chair of the department in Havana. The new philosophy professor, Felix Varela, was a supporter of Cuban independence and sought the end of slavery on the island (Gott, 2004). Instead of utilizing Latin in instruction, Varela presented his lectures in Spanish. Further Cuban centered change emerged in the study of law where Spanish law took over from older Roman Cannon law (de Quesada, 1905). Caught up in the revolutionary fervor sweeping the Caribbean in 1820-23, Varela spoke out against the injustice he witnessed in Cuba. Once the rebellion was found out and suppressed, Varela was forced into exile and eventually made his way to the U.S. (Gott, 2004).

Further changes in education at the university occurred as the century progressed. By 1830, a new department of history was formed along with one in literature. These improvements in course offerings, the hiring of new modern thinking professors, and the establishment of five new colleges in Havana, made the education choices available in Cuba the rival of what was presented in Europe. However this rivalry extended only to what was available in private institutions on the island. Members of the *Sociedad Económica* in 1836 recognized how far they had to go in order to provide education to all of the children of Cuba. Despite all of the progress made in the previous 40 years, the *Sociedad* was concerned that without a strong public education system they would not achieve the goals of a self-sustaining economic system independent from Spanish rule. This argument was best articulated by Domingo Delmonte (1804-1853), an important member of the early Cuban Independence movement speaking on the subject of public education in 1836:

We cannot accomplish anything as long as education fails to reach the heart of the masses and we barely have some discreet lawyers, capable clerks, entertaining literati, as well as an outstanding abstract mathematician or an experienced naturalist here or there. All that is good, the country is honored by them, and can benefit from their knowledge. But all that cannot be compared to the immense advantage that the country will possess when the majority of those born [in Cuba] can read, write, count, know the usual principles of their beautiful language and have some notions of geography, knowledge which will be more useful when held along with convictions derived from the purest principles of religion and morality. (Cruz-Taura, 2008, p. 5)

Examining Delmonte's concern over the then current condition of education in Cuba, I recognize the beginnings, in this statement, of what later became the rallying cry for independence from Spain in 1860. This sentiment is echoed by José Martí in his work to reconstruct the alliance between the exiles in the U.S., and the patriots on the island. His establishment of a school to educate Afro-Cuban workers in New York in the 1890's was not only an effort to create intellectuals of a socialist bent, but to elevate the individual to a point of self-sufficiency (Cruz-Taura, 2008).

This also presages the much later call from the *Sierra Maestra*, by Fidel Castro, for universal education of the masses, while on the path to socialism (Chibás, Pazos, & Castro, 1957). Delmonte's 1836 assertion is a striking pronouncement for the time, in that it is twelve years before the release of Marx's famous manifesto in 1848. Delmonte is clearly calling for universal education of the citizenry to "reach the heart of the masses" in order to benefit the country as a whole (Cruz-Taura, 2008, p. 5). While Cruz-Taura (2008) asserts that Delmonte is focused on the teachings of Adam Smith, and the "progress of society", I would argue this

statement focuses more on the perspective of universal achievement, independence, and pride of place. The beginnings of *Cubanidad*, the intense association with the ethnic nationalism of Cuba, can easily be traced to this perspective of Delmonte's.

As the island struggled through the middle part of the 19th century, education took a back seat to calls for independence and self-rule. Cuba had distanced itself from Spain during the rule of Napoleon at the start of the century. All of the Latin American colonies, Cuba included, developed autonomy from Spanish rule during this period due to Spain's concentration on their conflict with France. The trade between Spain and Cuba was restricted by British fleets, forcing Cuba to become reliant on British and American trade (Benjamin, 1990; Pérez, 1995). When England called for an end to the importation of African slaves into the Caribbean and received Spain's acquiescence to this demand, Cuban elites became concerned over their livelihoods. The 1817 treaty signed by Spain and England, prohibited the introduction of new African slaves into colonies controlled by Spain (Pérez, 1995). Targeted at the transportation of slaves, the treaty of 1817, and a second agreement in 1835, did little, according to Pérez (1995), to stifle slavery on the island of Cuba. However the ease of control England developed over Spain concerned the planter class of Cuba and encouraged them to cast around for support closer to home.

United States interest in Cuba began almost as soon as the young nation had won its independence from England at the end of the 18th century. So entwined with the fledgling country's aims was Cuba, that according to Benjamin (1990), passages about the island abound in the writings of most of the early American presidents and statesman. The lure of the jewel of the Caribbean weighed heavy on Jefferson and Madison, who continued correspondence relating to annexation of the island for several years (Benjamin, 1990).

As the United States struggled with their own problem of slavery, Cuban-born elites began to make entreaties towards the nation to their north. The argument of the *criollos*, (native-born Cubans), who desired annexation was if they became a part of the U.S., they would be protected from British attempts to end slavery in the Caribbean (Benjamin, 1990). In addition once a state or territory, Cuba would have an open door and unfettered access to trade with the U.S (Pérez, 1995). The counter argument, a renewed war between England and the U.S., or a battle for independence from Spain who would undoubtedly be aided by England in their combined quest to retain their colonial holdings in the new world; this view unsettled *criollos* and American annexationists alike (Benjamin, 1990; Pérez, 1995).

Despite the political unrest between Spain, England and the U.S., Cuban elites were quietly sending their sons north for education purposes. Travel between the U.S. and Cuba increased during the middle part of the 19th century as the elite Cuban planter class “developed extensive commercial contacts and social ties in the United States” (Pérez, 1995, p. 107). Through the 1830s and 1850s annexation of Cuba by the U.S. was a perennial topic on the island and in Washington, D.C. Presidents Polk and Pierce both offered to purchase Cuba from Spain during this period, to no avail (Pérez, 1995). Annexation seemed inevitable with *criollos* fomenting insurrection in Cuba, and foreign ministers colluding in Europe intent on “wresting it from Spain if we have the power” (Pérez, 1995, p. 110).

By the 1850s, Cuban annexation fervor was at its peak with several failed insurrections causing regular periods of turmoil on the island. Spanish authorities were kept busy quelling the fires of revolution that emerged in the Eastern provinces. However, by the late 1850s, with the U.S. embroiled in their own developing discussion on slavery emerging, interest in Cuban annexation by the United States waned in both countries. The Emancipation Proclamation of

1863 in the U.S. further dampened enthusiasm amongst Cuban elite for annexation; however, the war being fought in America between pro- and antislavery forces kindled the spirit of independence for many Cubans.

While the *criollos* and the U.S. were plotting for annexation during the 1840s, Spain was busying itself with the planned improvement of educational facilities on their island possession. In 1842, Spain decreed a review of Cuban schools with the intent of recognizing degrees issued from the island's universities, as being equal to those issued in Europe. Finding the condition of the schools of Cuba in disarray, the Spanish government issued orders to secularize education on the island and assimilate the universities under Spain's direct control (de Quesada, 1905). As is evidenced by de Quesada (1905), the assimilation of the universities by Spain was almost complete when the first major insurrection hit Cuba in 1868.

The first serious attempt at Cuban independence from Spain began when Carlos Manuel de Céspedes (1819-1874) freed his slaves in 1868, and encouraged other planters on the island to follow his lead. Within months, several thousand Afro-Cubans had joined the insurrection fighting for Cuban independence from Spain, and the right to direct their own affairs. As the insurrection grew, schools, both public and private began to close. This was due to the condition of open conflict that existed, and also to the lack of teachers who had left the schools to join the insurrection.

The ten-year-long insurrection ended in a virtual draw for the competing forces, but in utter devastation for the education system on the island. The pact of *Zanjón* in 1878 ended the war with pledges from Spain for new reforms (Pérez, 1995). Despite the concessions to release those slaves who had fought in the conflict, several thousand rebel combatants fought on for an additional ten weeks under General Antonio Maceo, the "Bronze Titan" (Aguilar, 2006). Swift

action by the new Spanish Captain General of Cuba decimated the ranks of the holdouts, who soon fled for safer climes (Pérez, 1995). The largest impact to Cuba after the war was in the area of immigration. In the decades that followed the conflict the population swelled with the addition of “some 250,000 Spaniards” (Pérez, p. 135).

Immediately after the war, as a product of the Treaty of *Zanjón*, reforms were set to be initiated in Cuban education. Regulation from Spain directed the construction of new schools, and the sending of financial assistance to local towns to pay teachers. These reforms, however, soon became victims to the rapid influx of Spanish immigrants. With little need to satisfy the desires of local inhabitants, the Governor, an appointee of the Spanish government, focused the reform in ways to benefit the arriving Spanish population. By 1880, had the directives from Spain written in the *Zanjón* treaty been carried out, de Quesada (1905) argued that the schools in Cuba “would have been as practical and complete as any country in the civilized world” (p. 274). Instead, with monies redirected to benefit Spanish immigrants, teachers became poorly paid and disinterested. Administrators soon lost interest in improving the schools and the methods of the teachers fell to very antiquated styles (de Quesada, 1905). The number of private schools developed on the island to meet the demands of the arriving Spanish immigrants soon rivaled the number of public institutions. In the school census of 1883, there were 535 public and 184 private schools (de Quesada, 1905). More troubling was the acknowledgement that 67 public schools sat vacant for lack of funds (de Quesada, 1905).

As the *peninsulares* population expanded on the island, Cubans were squeezed out of political patronage positions. In order to reclaim control over the politics of Cuba, the elite planter class most of whom were now struggling for access to the island’s influential Associations, formed the Liberal Party (Benjamin, 1990). The rapid influx of Spanish peasants

overwhelmed and marginalized the Creole inhabitants of Cuba. Financially cornered through patronage systems developed in Spain and carried out in Cuba, Cuban citizens soon chafed under the economic conditions enforced by the Spanish government. By the latter part of the 19th century, talk of insurrection once again began to filter across the island (Benjamin, 1990).

19th Century American Interest in Cuba

The weakening of Spanish interests in the continental Americas near the close of the 19th century, created a power vacuum in the western-hemisphere. The absence of a historical political power in the region, coupled with the emerging threat of western-hemisphere expansion by England and Germany, and the development of the U.S. concept of Manifest Destiny, led to the belief amongst United States politicians that Cuba should fall under U.S. control (Gott, 2004). In order for this to occur, the U.S. government had to discourage European powers from further involvement in the Western Hemisphere. The denial of opportunity policy utilized by the U.S. to deny Cuba to European powers other than Spain appeared to be the surest manner of eventual annexation of the island by the U.S. (Pérez, 1995).

Several discrete yet intertwined events had conspired to prevent Cuban annexation by the United States during the 19th century. From Jefferson's initial interest, through the U.S. Civil War, and the Cuban wars for independence, U.S. interest in Cuba remained steady; however, no progress was possible towards annexation due to ongoing conflicts in both nations. As the end of the 19th century approached, annexation desires were again rekindled by the recommencement of the Cuban War for Independence in 1895, and a restless, expansionist-focused U.S. Fomented by an exile community in the U.S., and supported by native-born Cubans, demanding freedom from Spanish rule, the Cuban War of Independence quickly drew interest from U.S. actors both inside the U.S. government and in the private sector (Benjamin, 1990; Gott, 2004).

José Martí and the Cuban Revolution of 1895

In the period between the end of the Ten Years War, and the commencement of hostilities in 1895, three key factors shape the course of Cuban events. The first, according to Aguilar (2006), was the rapid “rise and decline of the Autonomist party” (p. 27). Second, the United States soon became the most powerful force in the economics of the island. The third issue was the development and expansion of José Martí’s Cuban Revolutionary party (Aguilar, 2006).

José Martí was the key figure of the redevelopment of the Cuban drive for independence. Born in Cuba in 1853, Martí became a journalist and educator. During the insurrection of 1868-78 he was exiled from the island for writing a letter critical of the Spanish Army enlistment of a friend (Aguilar, 2006). Living in Spain as a political refugee from Cuba, Martí embraced the pedagogy of the newly developed *Instituto Libre de Enseñanza* in Madrid (de Quesada, 1905). The perspective of the *Instituto* was in direct opposition to the “officially sanctioned lack of academic freedom in Spanish universities” (de Quesada, p. 6). Despite his posthumous influence on Cuban education in the 1920’s, Martí is best known to Cubans for his ability to kindle harmony amongst the bifurcated Creole planter class and the exiled revolutionaries living in the U.S. After his sojourn to Spain, Martí resided in New York City beginning in 1881. It was from his base in New York that Martí was able to reorganize the Cuban revolution (Benjamin, 1990; Aguilar, 2006; Pérez, 1995).

Martí’s contribution to education in Cuba emerged from his perspective that equitable distribution of wealth could be achieved through redistribution of property and education of the masses. To this end he began educating Afro-Cuban exiles living and working in New York. Martí established the *Liga de Instrucción* using as a model the *Instituto* concept from Madrid (Gott, 2004, p. 88). The focus of the education at *la Liga* was a free and independent Cuba, a

Cuba *Libre*, “free from racism and oppression” (Pérez, 1995, p. 145). Martí’s teaching was designed to prepare the “revolutionary cadres of the future” to return to Cuba and fight for the improvement of the masses (Gott, 2004, p. 88).

A basic tenet of Martí’s teaching to the revolutionary cadres at *la Liga*, was the belief that Cuba needed to wrest its freedom from Spain and then defend it from the hostile takeover by the United States. One of the larger concerns for the revolutionaries, and Martí as well, was the fear that Cuba would eventually be annexed by the U.S. after a lengthy occupation. His most often heard exhortation while stumping the environs of New York and Florida in reference to this concern was “Once the United States is in Cuba, who will drive it out?” (Pérez, 1995, p. 147). It is through Martí’s efforts of uniting the causes of the divided island into the concept of a free Cuba for Cubans that fosters the development of *Cubanidad*, or Cubanness. Without this charismatic poet and educator, the cause of a free Cuba may never have developed, and surely would not have expanded to the extent that *Cubanidad* has today.

With Martí’s untimely death in May of 1895, and Maceo’s own six months later, General Gómez was left to promulgate the revolution alone. With this reposition of power from the civilian to the military, the ideals of social revolution fueled through education and redistribution of property, took a back seat to military objectives. The citizens of Cuba did not see the benefit of Martí’s Cuban-centered educational practices until the education reform movement of the 1920’s, nearly three decades after his death.

As Cuba sauntered towards a conflict with Spain, funding of education took a back seat to the financial development of the insurrection forces. According to Pérez (1982), the meager allowance Spain offered for Cuban education came to a halt as conflict swept the island and schools across the country were closed. The official policy of relocation of the Cuban population

to urban centers and the creation of concentration camps in Cuba by Spanish forces, disrupted schools and education in general at every level (Fitchen, 1974). As the conflict spread, many Cubans fled the island for the U.S.; among the tide of refugees were many teachers (Pérez, 1982).

A Declaration of War

By the middle of 1898, under the false assumption that the Spanish had blown up the *U.S.S. Maine* in Havana Harbor, and under the banner of ousting the final European power from the Western Hemisphere, the U.S. declared war upon Spain (Benjamin, 1990; Pérez, 1995; Gott, 2004). During the process of debating the Declaration of War with Spain, factions within the U.S. government, desirous of preventing annexation of Cuba, inserted an amendment into Congress' resolution for a free and independent island. The Teller Amendment as it became known, limited the actions post conflict, of the U.S. in Cuba (Gott, 2004). However, this codicil to the Joint Resolution of Congress did not prevent many both inside and outside of the U.S. government from desiring annexation following the cessation of hostilities.

In the immediate aftermath of the war, sentiment amongst U.S. military and civilian government officials were of the same vein, Cuba was unready, and unable to govern themselves. If left to their own devices, most U.S. officials believed the Cubans would destroy the island in short order. An example of the U.S. perspective on Cuban's ability to self-govern was offered by a New York journalist quoted by Pérez (1995), "If we are to save Cuba, we must hold it. If we leave it to the Cubans, we give it over to a reign of terror - to the machete and the torch, to insurrection and assassination" (p. 180). It was not just the press attempting to foment annexation of the island, by mid-1899, Military Governor General John R. Brooke is quoted as saying "these people cannot now, or I believe in the immediate future, be entrusted with their

own government” (Pérez, 1995, p. 180). Exhorted to move forward with plans for the transfer of the island’s government back to Cuban control, Military Governor General Leonard Wood claims “We are going ahead as fast as we can, but we are dealing with a race that has steadily been going down for a hundred years and into which we have to infuse new life, new principles and new methods of doing things” (Pérez, 1995, pp. 210-211).

As governor of the island under U.S. occupation, Wood saw his role as a transformer of the culture of Cuba into a system similar to that of the United States. His plan included the transformation of the island’s government, police and fire departments, military, courts and school system. The necessity of this transformation was to prepare the island for annexation by acclamation. The tool Wood chose was education, and the process was the use of U.S. created instructional materials and teachers trained in the United States as the delivery system to reshape the island’s population and culture in the image of the Colossus to the north (Gott, 2004). To ensure success in the schools of the transformation from Spanish to U.S. culture, Wood elected to employ Wilson Gill’s system of the School City. The School City was a system of teaching civics through the direct application of the practical process of city management in the schools. School children under this system became mayors, police officers, and representatives of their classmates in a system that mimicked the governments of major U.S. cities. Unique at the time, Gill’s system of civic education eventually spread to over 3,000 schools in Cuba and numerous others back in the U.S.

Education, as a transformative process of a population, has been in use for millennia. One of the most notable treatises on education and the state comes from Aristotle, who in 350 B.C.E. wrote:

The citizen should be molded to suit the form of government under which he lives. For each government has a peculiar character which originally formed and which continues to preserve it. The character of democracy creates democracy, and the character of oligarchy creates oligarchy; and always the better the character, the better the government. (Aristotle, 1994/350 B.C.E., Part 1)

Civics and citizenship education emerged as a topic in the field of education during the late 19th century in response to the growing tide of immigration (Ballantyne, 2002). Other social issues that urged on the growth of civics education in schools included increased urbanization and the rise of industrialization (Ballantyne, 2002). Early proponents of morals/citizenship education in the U.S. took the form of scholarly groups such as the Herbartians. The Herbartians were a group of prominent scholars following the teachings of German Johann Herbart (1776-1841) who focused their beliefs on education around the principle of developing ethical character (Hiner, 1971). Several early Herbartians are well known in the education field from the late 19th and early 20th centuries, and their ranks include Charles and Frank McMurry of Illinois State Normal School, Charles De Garmo of Swarthmore College, and John Dewey of the University of Chicago (Hiner, 1971).

As interest amongst government officials grew in Cuba to transform the populace to match that of the U.S., progressive educators were employed to lead the way. Professor Alexis Frye of Harvard, was tapped by General John H. Brooke, the first military governor of Cuba to lead the transformation (Epstein, 1987). Charles Eliot, President of Harvard College, the undergraduate section of the university, and a colleague of Frye's at Ginn Publishing, had recommended Frye to Elihu Root. The Secretary of War for President McKinley, then

subsequently informed Brooke of the President's choice for the School Superintendent for Cuba (Barry, 2004).

Frye utilized his contacts with Ginn Publishing, a textbook company to which he was a frequent contributor, to provide American textbooks, translated into Spanish, to assist in the education of Cuba's students (Barry, 2004). With the development of school buildings, supplies and textbooks, all Frye needed to complete the plan for transformation of the island's schools was teachers educated in the American system. Towards this end, he recruited 1273 Cuban teachers, and in an agreement with Charles Eliot of Harvard, and with the assistance of Elihu Root, transported the teachers to Harvard for reeducation sessions (*The New York Times*, 1900, April 14).

American Intervention in Cuban Education

With the end of hostilities in the Spanish American War, the U.S. began a campaign to rapidly "Americanize" Cuba in an effort to convince the Cuban people to agree to "annexation by acclamation" (Pérez, 1982, p. 6). The military government installed to ensure peace during the transition to Cuban independence under the Teller agreement, became the conduit to supply Cuba with the American way of life. Official U.S. policy was designed to turn Cuba into a model U.S. protectorate, American intervention reached into every aspect of Cuban life. Government structure was organized around the U.S. system, as were electoral laws and local police forces (Pérez, 1982). The deeper reach of U.S. business capital, abetted by U.S. military forces, secured land and economic holdings designed to ensure complete control over government processes by American firms (Pérez, 1982).

The devastation on the island left by the War for Independence had a profound effect on the Cuban education system. Most schools were either destroyed, or abandoned and in need of

furniture and basic supplies (Pérez, 1982; Cruz-Taura, 2008). Pérez (1982) quotes Fitzhugh Lee the military governor of *Pinar del Río* as saying, “In matters of public instruction it is no exaggeration to say that everything has to be done” (p. 7). The erasure of the existing system of Cuban education by the war had an unintended side effect. The U.S. Occupational Government found an easy opportunity to replace the antiquated Cuban school system with a modern U.S.-style education process. Early occupational government focus was, according to Pérez (1982), on the system of education in Cuba as a means of promoting “the attitudes and values compatible with larger American policy objectives” (p. 6).

Schools became the avenue the occupational government embraced to change cultural values at the fundamental level. Their hope was to inculcate the practices of the American way of life into the Cuban system through education. This tactic of using education as a transformative force, artfully adapted by the U.S. government in the early part of the century to “Americanize” Cuba, became the tool of necessity adapted by Castro after the revolution of 1959. In each instance the government in power wished to create a new version of the Cuban citizen. In the case of the U.S., the desire was to craft a Cuban/American hybrid desiring of annexation. For Castro and the *rebeldes* (rebels), the desire was the creation of the new man (MacDonald, 2009). In both cases, the spread, through education of the youth, of the ideology of the new government, was used to ensure adherence to the new doctrine.

Conditions and Improvement in the 1900s

As described by de Quesada (1905), at the end of the Cuban War of Independence, the system of secondary schools, matched with a certain degree of accuracy, the process of American high schools. While U.S. high schools averaged four years, the Cuban secondary

school took five. According to the report written by de Quesada, the courses of study followed this program:

First year – Spanish grammar, Latin, universal geography.

Second year – Spanish grammar, Latin, history of Spain.

Third year – Rhetoric and Poetry, arithmetic, algebra, universal history, and English or French.

Fourth year – Second course of English or French, psychology, logic and moral philosophy, geometry, and trigonometry.

Fifth year – Agriculture, natural history, anatomy, physiology, and hygiene. (p. 274-275)

Shortly after the American intervention into the Cuban war for independence, what Cruz-Taura (2008) calls an “impressive reconstruction package”, established a Board of Education on the island (p. 6). Enrique José Varona (1848-1933) was employed as the Secretary of Public Instruction working in association with Alexis Frye, the first U.S. Superintendent of Public Schools in Cuba (Cruz-Taura, 2008; de Quesada, 1905). Within two years of the end of the war, Varona witnessed over 3600 new classrooms constructed (de Quesada, (1905, p. 277), indicates 3,538 by 1905) intended to house 172,000 students (Cruz-Taura, 2008). In addition to the new classrooms, teacher training programs were initiated with the “founding of the College of Education at the University of Havana” and the “opening of normal schools in each province by 1915” (Cruz-Taura, 2008, p. 7). To accompany the rapid increase in numbers of teachers to support the expansion of classrooms, Frye and his U.S. associates, established summer instructional programs for Cuban teachers at Harvard University (Cruz-Taura, 2008; de Quesada, 1905; Harvard University Archives, n.d.). The *New York Times* from April 14th of 1900 describes such a cadre of 1500 Cuban teachers, who are coming to Harvard for a summer study

program under the guidance of commissioner Frye. In addition to Harvard, Cuban teachers were also invited to programs at the New York State Normal School in New Paltz, New York (Pérez, 1982, p. 12). Varona's philosophy of education was developed by his adherence to the concept of liberty advocated by John Stuart Mill and Herbert Spencer, both philosophers of renown in the 19th century. Perhaps the most influential change in the education system in Cuba came under the introduction of the School Law introduced by Lt. Matthew Hanna the Commissioner of Public Schools in Cuba. Hanna's introduction of a system of school laws based closely on that of the state of Ohio reorganized the chaotic system left behind by the Spanish.

Fighting back against the education and cultural reforms set down by the U.S. government were often the women of Cuba. Examining feminism in Cuba in response to attempts by the U.S. to annex the island requires a departure from the universal nature espoused by Martí. Cuban feminists did not, according to Stoner (1991), seek to act in opposition to the desires of men regarding independence from Spain, but as articulated best by Mariablanca Alomá in the mid 1920's, women of Cuba desired to be men's partners and have an existence as individuals apart from men (Stoner, 1991). It was with this perspective that I attempted to examine the actions of feminists of Cuba, not as individuals seeking to be apart from the men of Cuba, but to be their partners and work together with them for a common goal. Unfortunately, Cuban feminists and women in general are absent from the official reports relating to the reshaping of the education system in Cuba, from both the U.S. Government and the Cuban archives. This is an area of research that I suggest needs to be examined through a feminist theoretical perspective as it could produce different findings.

In the beginning parts of the 19th century, Cuban women stood apart from their contemporaries in other countries. The collective sense of belonging for Cubans was in its

nascent stage at this time, and Cuban women responded to the desires for independence with largely symbolic acts. Due to the all-encompassing power bestowed upon the father of a household, known as *Patria Potestad*, women, wives and daughters, had to relegate authority over their households and behavior to the father figure of their family. According to Prados-Torreira (2005) Cuban women controlled little besides their own appearance. In defiance of Spanish atrocities, such as the execution of a young revolutionary by Spanish guards, numerous women on the island cut their hair short, or cut off their braids. The distancing of themselves from Spanish authority, through acceptance of the dress and hairstyles of French women, indicated that Cuban women were independent as much as they could be. With the advent of the Ten Years War begun in 1868, Cuban women come out of the shadows and begin to take front row positions in striving for independence for their island.

During the early years of the Ten Years War, Cuban women were often left to manage the households without help from their husbands or partners. Ana Bentacourt (1832-1901) is one of these early feminists. In 1869, due to her husband's illness she spoke at the conference of Cuban revolutionaries. While speaking forcefully for independence for Cuba, *Señora* Bentacourt also reminded the men of their duty to provide additional freedom for women of Cuba, and to free slave across the island. While not as vocal as *Señora* Bentacourt, women across Cuba began to enter the fight for independence directly. Some became spies, crossing enemy lines daily carrying information about Spanish troops, ammunition for the upcoming battles, supplies for the camps, medicine purchased from the Spanish, and messages from loved ones at home. As the war dragged on, many women left widows by the war took up arms themselves and became *mambisas* (women rebels) (Prados-Torreira, 2005).

In the period between the Treaty of *Zanjón* that ended the fighting in 1878, and the commencement of the final Cuban War for Independence from Spain, Cuban women continued to push for additional freedoms. Encouraged by their acceptance during the conflict as rebel fighters, Cuban women pushed for dissolution of adultery laws, strengthening of economic equality for illegitimate children, and eventually, for divorce laws that provided women with the ability to end destructive marriages. In addition, some women, most notably María Luisa Dolz (1854-1928), entered the field of education traditionally occupied by men. During the Ten Years War, many schools were closed due to the male teachers leaving to fight in the war. In order to keep the schools open, many young women in Cuba were conscripted into service as school teachers. María Luisa Dolz took this opportunity to begin a lifelong career in education. Her desire to create a school that benefitted Cuban children, led her to visit over 150 schools across Europe and North America. Taking what she saw as best supporting the child of Cuba, *Señorita* Dolz began a school for elite young women in Havana. After the end of the Cuban War of Independence in 1898, she returned to the University of Havana to receive her Doctorate in Science. *Doctora* Dolz was the first Cuban woman to graduate from the University of Havana with a doctorate (Stoner, 1991).

In the years following the Cuban War of Independence *Doctora* Dolz worked alongside José Varona to help craft a curriculum situated to the students of Cuba. Having witnessed the workings of schools across the western world, *Doctora* Dolz sought to craft schools that followed the teachings of José Martí, and acknowledged the unique situation in Cuba regarding the mixture of peoples. Her struggle against the division attempted by the U.S. occupational government to segregate the schools in the manner of U.S. schools helped retain for Cuba a sense of community belonging absent in the U.S. at this time (Stoner, 1991). Through her writing of

textbooks for Cuban children, the creation of a curriculum designed for Cuban students, and her assistance to José Varona on the structure of the schools, they completed the Varona plan for education that lasted through 1940. In addition, her work with Varona helped establish a college of teacher education at the University of Havana (Cruz-Taura, 2008).

Doctora Dolz's most important contribution to the system of teacher education is still the driving force of educational pedagogy in Cuba today. She promoted the drive to emphasize the importance of teachers learning methodology rather than increased knowledge of content that has left a lasting legacy of success in Cuban education (Cruz-Taura, 2008). In addition to acting as an early leader in education, she was also an early active promoter of the need to educate women in Cuba (Cruz-Taura, 2008).

Through her work in education development and reform, Stoner (1991) asserts that María Luisa Dolz, established an alternative to the imposition of the American system of education. Her efforts to observe and select courses she believed were best for Cuban children allowed for the introduction of courses not normally taught to women in most of the western world. Her work alongside José Varona led to the development of a curriculum and structure that successfully offered an alternative to the imposed U.S. curriculum. For that reason and others, she is one of the most revered educators of her time in Cuba.

Looking forward to the present, it is easy to still see the effect of the American intervention of 1900 on Cuban education. The system of grades, the structure of school districts by municipality and province, and the importance placed on pedagogical training in teacher education, are all facets of the of the current system that owe their inception to the combined work of Alexis Frye, Lt. Matthew Hanna, José Varona, and María Luisa Dolz y Arango along with many other Cuban and American educationalists of this time period.

By the end of the 1904-05 school year, Cuba boasted of “231,869 daily attendance” in public and private institutions, some “95% of the school census” on the island (de Quesada, 1905, p. 278). 105 school districts had been formed with “1 city district of the first class, 11 city districts of the second class, and 93 are rural districts” (de Quesada, p. 278). Over 3.75 million dollars was budgeted and spent in the prior school year for salaries, new construction of schools, and supplies. Cuba’s education budget amounted to over 20% of the general budget of the nation at a time when U.S. expenditures on education hovered around 1/4% of GDP (de Quesada, p. 278; Chantrill, 2012). Cuba’s adherence to an elevated budgetary amount accorded to education has remained in effect as late as the year 2000 where The World Bank (2000) lists the education budget as approximately 10 to 11% of GDP in a time when severe economic conditions were facing the island (p. 7). So great was the need in 1901 that despite the relatively high expenditure of 20% of GDP, General James H. Wilson beseeched Andrew Carnegie for private contributions necessary to purchase English language textbooks (Pérez, 1982).

According to de Quesada (1905), the money was spent well. Around 3,600 schools had been built on the island. Around 100 more were on the way (de Quesada, p. 278). New cadres of well-trained teachers, many educated in summer programs at Harvard University in Boston Massachusetts, populated the classrooms. Student attendance was at record levels and the Cuban schools were winning awards at international conferences (de Quesada, p. 278). Teacher education had moved into the professional realm with the development of the College of Education at the University of Havana. New teachers were graduating on a regular basis with “certificates of first, second, and third degree, according to their abilities” having completed rigorous examinations given by the regional school board examiners (de Quesada, 1905).

Part of the purpose of reorganizing schools and developing an extensive system of education on the island was to serve the economic interests of the U.S. Pérez illuminates this perspective through a quote of Superintendent of Public Schools Alexis Frye. In his *Manual para maestros* (manual for teachers), Frye expands on the importance of teaching and learning English for Cuban students, citing the emergence of commercial ties between Cuba and the U.S. On another occasion, the Superintendent stated:

Recognize the fact that the commercial language of the future in Cuba will be English. We have no wish to affect or change the language of the island, which must continue to be Spanish, but by teaching ...English we will give them a better chance to understand us and do business with us. (Frye, 1902, p. 9)

The instruction of English on the island was purposefully directed to preparation of future annexation. Status and mobility soon came to Cubans who spoke English. This was not lost on the remainder of the island's inhabitants who, according to General Wilson "are anxious to learn English and read and study American books" (Pérez, 1974, p. 9). Clearly the aim of English education in Cuban schools was intended to foster annexation; however there were other deeper reasons in political and commercial fronts. Individuals who had a command of English soon recognized the necessity of their children abandoning the trappings of the defeated Spanish regime and embracing those of the rising star of the north. Similar in a manner to the phrase "cash is king" in the U.S., English language acquisition in Cuba was soon accorded the same status. English became the language of commerce and the future, while the Spanish language was pushed to the realm of common speech and the past.

Cuba however, was spared the indignity of total language immersion in the island's schools that was foisted on her smaller neighbor to the east. Puerto Rico, also taken as a prize

from Spain post-conflict, was under the control of General John Brooke, former Governor General of Cuba (Pousada, 1999). The transculturation project underway in Puerto Rico necessitated a total transformation of teaching. Under the plans for education proceeding in Puerto Rico, the islands children were instructed solely using English. The 1902 Official Language Act formalized the use of English in all Puerto Rican “governmental departments, courts, and public offices, English was to be regarded as co-official with Spanish” (Pousada, p. 38). As described by Pousada (1999), North American teachers were hired and the daily trappings of the American school were layered upon the tiny island with little room for compromise (Pousada, 1999).

Conditions in Cuba took a decidedly different turn than in Puerto Rico. This was entirely due to the introduction and adherence to the Teller Amendment. The Teller Amendment was added into the Joint Resolution of Congress prior to the commencement of the conflict. Written by Senator Henry Teller of Colorado, the amendment was inserted into the resolution officially to appease anti-imperialist factions in Washington. Unofficially, the amendment was seen as a method of protecting U.S. sugar interests in the country’s emerging western sugar belt. The Teller amendment arose during, as Pérez (1982) states, “a moment of precipitous selflessness” where the appearance of imperialism was intended to be avoided. The text of the amendment clearly stated the intention arrived at during the heated debate on the eve of war with Spain.

The United States hereby disclaims any disposition of intention to exercise sovereignty, jurisdiction, or control over said island except for pacification thereof, and asserts its determination, when that is accomplished, to leave the government and control of the island to its people. (Benjamin, 1990, p. 50)

While the Teller amendment only survived four years before being replaced by the much more expansive and invasive Platt Agreement in 1902, the tone it established in the reconstruction effort mollified the hidden intent of the occupation.

This restricting process initiated by the Teller amendment was evident to some extent in the education reconstruction effort. I suggest that this was due primarily to the length of time usually necessary to implement an in-depth government program. Once a plan the magnitude of the reformation project in Cuba is initiated, a budget appropriated, and the provisions of action codified by the bureaucratic system, changes are difficult to introduce. Bureaucratic control of budgets and the inherent protection of these budgets by the bureaucrats (in this case the military) make change laborious and difficult. The circumstances associated with the introduction of the Teller amendment put Cuba on the path to modernization of their education system with the intended consequence of willful annexation. Puerto Rico, on the other hand was seen simply as a won possession, and was treated as such.

One strong component of the acculturation system of education was exemplified by Governor Leonard Wood's idea of "school cities." The School City, as described by Pérez (1982), was intended to "impress upon Cuban children the virtues of the American political system and warn against the vices of Latin American politics" (p. 9). de Quesada (1905) reinforces this position offering "The plan is to have the scholars organize themselves into bodies, similar to the municipal governing bodies, the purpose being to teach the youth the first principles of responsibility and self-government" (p. 276). An examination of the charter of "school cities" by Pérez (1982) identifies a paternalistic view towards Cuba by the U.S. Pérez (1982) identifies comments attributed to General Leonard Wood in his discussion of the concept of the School City, who speaks of the "natural tendency" of Latin American people to be "led by

hot-headed orators who do not like to have other hot-headed orators for their public officers”, and the “chronic revolutionists in Central and South America where the people are impulsive and easily led” (p. 10). The meaning imparted in these words that acted as the foundation of the “school cities” system were clearly designed to identify that “the United States is the most successful of all human governments” (Pérez, p. 10).

Textbooks in general, during the early period of reconstruction, were simply Spanish language versions of American texts. Little was changed in the books, according to Pérez (1982), which often made the concepts difficult for Cuban children to understand. As is argued by Gellner (2006), the education of children has a monopoly over cultural transmission in societies where formal schools exist. When seen in this light, the use of Spanish language versions of American textbooks was another attempt to acculturate Cuban students into the processes of becoming American. In some areas the total transformation of practices such as measurement units caused confusion in Cuban schools (Pérez, 1982). In early 1901, Lt. Matthew Hanna, the Commissioner of Public Schools under General Wood, stated when speaking of the reading textbooks published and imported from the U.S.

The text-books in use at the present time were chosen as being the best, in the opinion of the board of superintendents, of those presented for their consideration. Still they do not meet the conditions in Cuba. The readers treat of northern scenes, conditions, and customs that are totally unknown to children of Cuba. (Wood, 1901a, p. 111)

In addition to the complex reassignment of culture presented to Cuban children, the history of the island was under attack as well. U.S. versions of Cuban history presented in the new textbooks depicted events in Cuban history entirely from the northern perspective. The efforts of the Cuban people to win their own independence were subsumed by an U.S. viewpoint

that concurrently weakened the contributions of Cuban patriots and elevated the actions of U.S. forces. These actions were, according to Pérez (1982), a concerted effort designed to foster Cuban gratitude to the U.S. for their independence. The three year war for independence became instead a three week war fought by United States troops who liberated the island from hegemonic control by Spain. Pérez (1982) argues that this adaptation of the historical events was targeted towards eventual annexation.

This claim was to establish a hold over Cuba more powerful than the Platt Amendment, for it was a proposition grafted directly onto the national consciousness. In advancing the notion that the United States was responsible for ending Spanish sovereignty, the Americans established the pretext to monitor and regulate the conduct of the nation that the United States claimed it had created. United States responsibilities began, not ended, with Cuban independence. And for this effort in behalf of the island, Cuban gratitude was expected and acquiescence assumed. (Pérez, 1982, p. 11)

The necessity of the use of cultural and historical realignment to foster gratitude is reinforced by Gott (2004), who states that “in spite of the Teller Amendment, most Americans running Cuba thought that they had arrived to stay” (p. 106).

President McKinley, it appears, eventually developed a different idea regarding a long term U.S. presence in Cuba. Ensnared in an open conflict with insurgents on another U.S. won possession of the Spanish American War, the Philippines, McKinley was in no mood to bother with further Cuban annexation plans. In a private letter to General Wood, quoted by Gott (2004), McKinley instructs Wood to:

Give them a good school system, try to straighten out the courts, put them on their

feet as best you can. We want to do all we can for them, and to get out of the island as soon as we safely can. (p. 106-107)

Despite these political directives to follow the letter of the Teller Amendment, and the increasing pressure from Democrats in Washington to temper expansionist tendencies, the popular sentiment in the U.S. was for further cultural change in Cuba. In concert with official ventures private capitalists sought opportunities on the island. In addition to the private and government sectors, “Protestant evangelists established almost ninety schools (*colegios*) in Catholic Cuba between 1898 and 1901” in an effort to subsume the dominant Catholic culture of the island (Benjamin, 1990, p. 61). The erasure of Spanish culture and the reintroduction of the American way of life were promulgated by governmental, private and religious institutions from the U.S. in a loosely orchestrated Cuban *danza*.

The effect of several years of U.S. intervention in Cuba’s education system did show rapid and positive results in the area of literacy. According to Epstein (1987) the literacy rate for children in Cuba rose sixteen percent during the first ten years after occupation (p. 4). Over the ensuing decades, the literacy rate climbed steadily reaching 62 percent of the population aged ten years and over by 1919 and 72 percent by 1931 (Epstein, 1987, p. 4). In addition to literacy achievement, school populations increased as well. By the 1925-26 school year, it had climbed 17 percent over the two decades since Cubans had taken over management of their own government (Epstein, 1987). The support in the general population for educational achievement was evident in comments such as “to abandon education is the worst crime which can be committed against a nation” made by Ramiro Guerra y Sanchez, a notable Cuban educator, and quoted by Johnston (1995, p. 3).

Despite the support for education, literacy rates, attendance, shortages of schools and teachers, poor hygiene in schools, and high levels of dropouts, began to plague the Cuban school system (Johnston, 1995). Citing Guerra also, Epstein (1987) indicates that the figures released for the 25-26 school year are incorrect. According to Epstein (1987) Guerra's figures actually indicate an increase in illiteracy amongst white and black students on the island, and the bunching of students in the elementary grades (Epstein, 1987). In addition to Guerra, Epstein (1987) cites Carlos Trelles who reports actual attendance had steadily dropped in the period post U.S. occupation.

Several factors weigh on this abrupt change in the condition of Cuban schools. The first, and perhaps the most salient to the discussion was the lack of political opportunity available to many Cubans. This is evident in events such as the rise of the Party of Color in 1908 (Pérez, 1986). Restricted by both the U.S. intervention, which focused economic and political control in the hands of American companies and the U.S. military, Cuban elites focused their energies in a narrow economic band (de la Fuente 1998; Pérez, 1986). According to de la Fuente (1998), and Pérez (1986), Cuban politicians were restricted to economic control of only the "civil service sector" of Cuba. Economic marginalization drove a consolidation of political power in the hands of the Cuban elite who were mostly Spanish (Johnston, 1995). Hampered by the minimal budgets available for patronage distributions, Cuban politicians sought to restrict access to the island's government. The corruption that existed within the Cuban civil service sector also permeated the school system. Teaching positions were often secured through rampant nepotism and bribes were commonplace (Epstein, 1982). The power structure that emerged under these conditions only served to further strengthen the grip Spanish elites held on the education system.

The second condition was the rapid influx of Spanish citizens immigrating to Cuba after the revolution. Long an ambition of the Spanish government, the “whitening” of Cuba above 50 percent of the population, was achieved shortly before the War for Cuban Independence. However, the migration of over a million Spaniards after the war ensured the total control of the political spectrum by Spanish (and white) settlers (Gott, 2004). The fast rise of Spanish settlers arriving in Cuba further strained the tenuous hold on political power enjoyed by the island’s *criollo* population. Public schools also felt the effects of the transfer in political power. As Spanish immigrants arrived and achieved economic success, they tended to hire other Spanish settlers. As a result of the increased Spanish immigration, private schools began to rise in number and prominence as they did following the Ten Years War. This was primarily due to the desire of Spanish immigrants, who saw themselves as separate from native Cubans, to send their children to schools owned and managed by fellow Spaniards (Johnston, 1995). Epstein (1982) identifies a central feature of the discrepancy between racial percentages of the population and enrollment figures of white and black students, as the direct result of private school enrollment by white students. One additional weakness of the system put in place by the U.S. occupation force was to turn over control of the education system to local authorities (Epstein, 1987). As the population of Spaniards increased, so did their control over local boards of education.

Finally, the third major issue is an outgrowth of the first two. Due to the absence of funding after the end of occupation by the U.S., Cuban schools had to rely on island resources to provide for the necessities of their student’s education. With the vast majority of the economy controlled by United States firms, and with the Cuban political system only managing the civil service sector, little money was available for school improvements. As schools denigrated over time due to lack of financial support, the children of elite parents were sent to private schools

(Johnston, 1995; Epstein, 1987). Racial concerns also prompted the flight by white students to private education. The bifurcation of education became a concern for nationalists as they saw the two tiered system to be in direct opposition to the ideals espoused by José Martí. Nationalists saw the division in education as a reification of the existing class bias and a perpetuation of the existing class structure (Johnston, 1995). The evident failure in the Cuban educational system began to influence a rise in nationalistic fervor. Private institutions were accused of a lack of patriotism and of not teaching about Cuban history and love of *patria* (country) (Johnston, 1995; Epstein, 1987).

The failure of the imposed U.S. system of education was perhaps due to oversimplification of a complex problem. Cuba was not a homogenous country, nor was there in any manner, economic parity on the island. The vast disparity in wealth became mirrored in the education system with the expansion of private schools and degeneration in the public institutions. Due to the constraints imposed under the 1902 constitution and the threat of the Platt Amendment, Cubans enjoyed little control over the economic affairs of the country. The one avenue open for economic control by Cubans, the civil service sector, was hotly contested between Spanish immigrants and native born Cubans. Singularly these issues do not rise to the importance of causing a failure of the education system in Cuba. Collectively they allow for a cascade effect that slowly pulled the support away from the growing education system. Lincoln de Zayas, once an aid to Alexis Frye and one of the apparent assistants in the development of Frye's *Manual para Maestros*, comes closest to the reason for the failure. "It was a mistake to give to the people of Cuba the right to elect their school boards; it was a mistake to entrust the government and administration of their public schools to the people of Cuba" (Epstein, 1987, p. 19).

The combination of a narrow sphere of political influence coupled with a disparity in wealth and a growing racial divide caused a slow bleeding of support for public schools in Cuba. As the problem worsened, it fed upon itself, with less funding available for failing schools and a growing disparity between elite whites and poor blacks. By allowing local control over the school boards, the inevitable demise was apparent, it just took decades to materialize.

Chapter 3: Methods

During the period immediately following the Cuban War for Independence (1895-1898), and the culmination of the Spanish American War (1898), a radical transformation of the education system of Cuba was begun by U.S. occupation forces. While extensive scholarship on the events of this time period is available, scant research exists that examines and analyzes the specific process of attempted transformation of the island's culture and its impact on education methods on the island. Rather than focusing on the processes used, Cuba scholars such as Benjamin (1990), Pérez (1983, 1995), and Gott (2004), examined the purpose and result of the transformation through a mostly political lens. Their common assertion is that the action began as a paternalistic process of adapting the Spanish culture, prevalent on the island, to one that matched that of the U.S. culture, with the eventual intent of annexation by acclamation of the island's inhabitants. However, integrated into these Cubanologists presented works are hints of how the U.S. occupation force intended to educate the inhabitants of Cuba to desire annexation by the United States. A transformation of the education system on the island of Cuba was planned, put in place, and begun, with the intent of encouraging the children of Cuba to adapt to U.S. culture.

Intertwined within the general transformation of the political, civil, and cultural components of Cuba, a major reconstruction of the education system was begun almost immediately after the capitulation by Spain in 1898. Official U.S. policy towards direct interference on the island for the purposes of annexation was initially controlled by the Teller Amendment. The Teller Amendment was a last minute addition to the House Joint Resolution

that recognized Cuba's right to be independent from Spain. Inserted into the resolution in order to obtain the votes of the Democratic senators who were mostly anti-annexation, the Teller Amendment severely restricted the options of the U.S. government post conflict (Pérez, 1995). Due to the restrictions held within the text of the Teller Amendment, the plans put in place by the first military governor, Major General Brooke, focused on preparing a system of government, schools, civil service such as sanitation, police and fire departments, and a gradual transformation of power from the U.S. occupation forces to the new nation of Cuba (Benjamin, 1990; Pérez, 1995; Gott, 2004).

As I have asserted earlier in this study, the use of education as a transformative process of a people, by a government, is well documented in historical scholarship throughout the last 2,300 plus years. The teaching of an older generation's perspective to the younger perpetuates the "peculiar character" that Aristotle (350 B.C.E.) ascribed as necessary for the improvement of a society. While several scholars have undertaken reviews of the period between 1898 and 1912 in U.S. and Cuban relations, most notably Thomas (1971, 2006), Benjamin (1990), Pérez (1982, 1983, 1995), and Gott (2004), these authors have focused primarily on the political, commercial, and cultural aspects of the occupation of the island. Additionally, two recent works out of Cuba, the first by Lima Diaz (2011), and a second by Torres-Cuevas and Loyola Vega (2011), present an important counter-narrative of this time period from the perspective of the occupied country. However, neither the U.S.-nor the Cuba-based scholars have examined the use of education as a transformative tool with anything other than passing mention.

While Pérez (1983) does commit extensive discussion to the topic of the development of the education system, I have been unable to uncover in his work a review of the types of courses or curricula used by the U.S. occupation government, nor is there evident an examination of the

instructional Materials or of specific textbooks used in the classroom, post-conflict, to teach Cuban students. One Cuban scholar employed by the U.S. military government, de Quesada (1905), does indicate that a systemic introduction of civics education was underway at the time of his research in Cuban schools. In addition to de Quesada, a report released by Lieutenant Hanna (1902a), the Commissioner of Public Schools under the U.S. occupation, presents the results of the introduction of the School City Program. Despite these tantalizing bits of data regarding the use of civics education in the transformation process, I have been unable to discover a study that has investigated the use of civics and citizenship education as an extension of the annexation plans of the U.S. for Cuba following the Spanish American War. Given this lack of scholarship, it is my intent in this study to provide a deeper and more complete understanding of the historical development of the Cuban education system and the use of civics/citizenship education during the period of U.S. occupation, 1898-1912, to accomplish this task.

Sample

In order to begin the collection of initial information to inform the foundation of my study, I began a literature review with search inquiries on the University of South Florida Library e-portal search engine. Utilizing what Maxwell (2008) would describe as the “unfolding of the data” (p. 215), I developed three inquiries to explore the field in a broad perspective. Initial categories were: “History of education in Cuba,” “Cuba annexation and the Spanish American War,” and “Cuban educators 1880-1930.” I developed these inquiries from prior knowledge constructed in my previous studies of Cuban history. Several areas of focus, or topics, emerged from the initial inquiries. The initial topic area or theme that emerged from the data was the construction of the school system under the Spanish, prior to the War for Cuban Independence.

A second main topic coalesced around the changes in education practices and curriculum under the occupying American forces. The final major theme questioned what forces directed the transformation of Cuban education following the War for Cuban Independence, and what was the ultimate purpose of U.S. involvement in the Cuban education system?

As I collected information on the history of the Cuban education system, I quickly realized that several factors would need extensive historical analysis in order to understand the complex interactions embodied in their presence during the period 1898 to 1912. Through this in-depth review of the Cuba education system under Spanish rule, several Cuban educators came to light for further analysis. In a process similar to a snowball sample, as described by Gall, Gall, and Borg (2007), the discovery of more detailed information about an aspect of my study often led to data richer in detail, or containing additional resources to explore. This in-depth data analysis also added to the triangulation of my study by providing a more detailed picture of the events under review.

Further issues that came to light through the data collected during my pilot study in Cuba and Washington D.C. were a deeper development of the constructs of citizenship, culture, belonging, *Cubanidad* (Cubanness), civics education, acculturation, and cultural conquest. These topics, while not directly related to the collection of the data are necessary due to the support they provide for analysis of the information collected. To ensure the construction of my definition of civics education is deeply informed, I review the development of the concept of civics education from the Ancient Greeks, through the Age of Enlightenment, and into the modern exploration of belonging. Scholars whose works are used to support this review are Plato (360 B.C.E./1997), Aristotle (350 B.C.E./1994), Hobbes (1651), Locke (1690), Rousseau (1761/1973), Hegel (1821), Tylor (1871), Dewey (1922), Marshall (1950), Ignatieff (1993),

Brubaker (2004), Gellner (2006), and several other authors enmeshed currently in this lengthy and transitional concept.

In the pre-independence period of the historical review, I was able to uncover several influential educators who emerged later in the study as collaborators with the U.S. interventionists. Although I was initially dismayed by the lack of supportive resources for the period immediately bounding the War, through a close reading of the one major text I uncovered at the start of my research, several other sources emerged which would further inform my study. Through a detailed analysis of the data collected during my initial literature review that was focused on the phase of transformation, several themes emerged which gave broader perspectives of the transformation process, and the extent of the efforts by U.S. educators to ensure success in the annexation attempt. Themes, as I used them in this analysis, were defined by Gall et al. (2007) as “salient, characteristic features of a case” (p. 252). Patton (2002) further clarified themes as “strategic ideals that provide a direction and framework for developing specific designs and concrete data collection tactics” (p. 66). It was with the direction from these two perspectives that I developed categories for aligning collected data.

The themes that emerged from the literature review included: English language instruction, the use of books published in the U.S. as translations of previously published U.S. school books, civics education as a part of the Cuban curriculum, Cuban teacher training in the U.S., the use of Ohio school law as the structure of the Cuban system, the introduction of civic-based moral education, and colonization of Cuba by U.S. and Spanish citizens. These initial themes were deconstructed to determine if hidden sub-themes existed within their structure. In the deconstruction process I relied on accepted grounded theory practices as defined by Glaser and Strauss (1967) to allow topics of importance to emerge from analysis of the data. By

adhering to the clustering of important topics that evolved during this process, I was able to identify additional themes such as the structure of plans of education under the Spanish in the 19th century and the Cuban teacher training program developed at the Normal School in New Paltz, N.Y., and put into full effect at Harvard University. One additional and extremely important theme was the use of the School City Program developed by Wilson Gill of the New Paltz Normal school in a large number of schools across Cuba. While thick with period information, the results of the review of existing literature left numerous gaps in the data concerning methods and processes used in the attempted transformation of the Cuban school system.

What quickly became clear in the initial investigation phase was the necessity of discovery at the source, Havana, Cuba. Documents that appeared initially to be only available in the University of Havana library and other libraries in Cuba were necessary to corroborate information hinted at by texts available in the U.S. In addition, several Cuban-based works that present the counter-narrative of the events, while visible in online searches, appeared to be only available in libraries and bookstores in Cuba. Finally, in order to uncover as many perspective as possible, I intended to scour the book stalls in *La Plaza de Las Armas* in Havana where many Cuban booksellers offer antique works for sale. In order to ensure that the sample I was exploring would have depth and richness of information, including divergent views of the occupation, it became clear that some data recovery would be necessary in Cuba. With a purpose and a plan of study in hand, I constructed my study.

Constructs

In order to identify the type of study that best fit my topic of research, I utilized the Differences between Quantitative and Qualitative Research guide in Gall, Gall, and Borg (2007).

Reviewing the constructs step by step, I determined that I was assuming that social reality in my study was constructed by the participants in it, rather than assuming that the reality of this period under study was objective. Munslow (2006) agrees with my perspective stating that “History is, rather, a representation and, like all aesthetic representations, a creation” (p. ix). Munslow’s view of history as a construct of the observer is in direct opposition to the perspective offered by Adam Ferguson in his entry on history in the third edition of the Encyclopedia Britannica (1788-1797). Ferguson espoused the common belief of historical scholars of his time asserting history was settled fact with little room for argument. Outlining the general concepts of history for the encyclopedia article, Ferguson stated:

HISTORY, in general signifies an account of some remarkable facts which have happened in the world, arranged in the true order in which they actually took place, together with the causes to which they were owing, and the different effects they have produced as far as can be discovered. (p. 560)

It is Ferguson’s point of view on the accuracy of historical fact that has often colored the historian’s work leading to scholarship that is presented as a fixed reality. Acknowledging that historical data is constructed by the observer and the historian, was an important first step in my study, as it acknowledges the fact that what I was able to discover through research was presented from a reality observed only in part by the authors of primary and secondary sources and was adapted further by my own analysis. The social construction of reality is understood to exclude some perspectives, especially in historical research, as only those views which are written down or collected in photographs, charts, or other visual/auditory media, are available for research at some future time. The views that are not archived in some manner are lost to future

research. While my research was extensive and in-depth, I understand that this is only a partial view of the event that was under study.

Next, I agreed that the social reality of my study was continuously constructed and specific to that time period and not necessarily constant across time and different settings. Further analysis of the guidelines allowed me to recognize that I viewed human intentions and actions as major aspects of my study, and did not see causal relationships as mechanistic in nature. While my study does not allow me direct participation with the subjects of my research due to the extended period of time between the present time and the time of the event, I can, if necessary for clarification, interact with some of the authors who have previously investigated this era and developed some of the secondary sources I utilized to inform my literature review.

Delving deeper into the guidelines of Gall et al. (2007), I recognize that my study analyzed the meanings that individuals created, rather than looking at behavior. It is in this creation of meaning that the perspective presented in the data I collected was evident. As I reviewed the collected data, I constantly reminded myself that what was presented in those documents were the views of the authors, and not necessarily completely objective. It was also important to keep in mind that both primary and secondary documents are often written for a specific purpose and are indicative of the author's view on a particular subject. The major component of my study was to uncover data contained within the collected documents obtained during the collection phase of my study. This fits perfectly with my research, and is in opposition to analyzing social realities as variables of a study. Looking at the preconceived, emergent aspect of the guidelines, I had a quandary which I address below in the data collection portion of my study analysis.

Since I did not analyze data statistically, but instead utilized analytical deduction to uncover hidden themes in the collected data, I had further evidence to support a qualitative study. Additionally, the report style used to discuss the data is rich in interpretation, and allows readers to develop their own views of the collected information. Finally, a depth of content collection method rather than a broad statistical review binds this study in a qualitative framework (p. 32). Based on my analysis of the guidelines set forth by Gall et al., my study clearly belongs in the qualitative framework category.

Having established the rationale behind my decision to bind my study in a qualitative framework, I next classify my design structure. In order to focus the inquiry phase of my study, I utilized the general outline of a qualitative historical inquiry adapted from the guiding questions for methods decisions offered by Patton (2002). The six questions I addressed in the development of my methods section are: 1. What are the purposes of my inquiry?, 2. Who are the primary audiences for the findings?, 3. What questions will guide my inquiry?, 4. What data will answer or illuminate my inquiry questions?, 5. What resources are available to support my inquiry?, and, 6. What criteria will be used to judge my findings?

Purpose

After examining the breadth of my research time period and the purpose behind my inquiry, I chose a phenomenological framework as defined by Glesne and Peshkin (1992) to support this study due to the ability to focus on a small set of concepts which hold intertwined and complex data. Through a careful analysis of the data, I was able to explore the reality of the behavior of the individuals involved in the occupation by U.S. forces in Cuba, and better understand the many factors that were in play, by them, to attempt annexation. Utilizing a quantitative or mixed methods study in this analysis, while providing interesting data on the

number of schools, students, types of courses, or number of teachers, books, and dollars spent, would leave behind the complex message of the human interactions imbedded in the data. As Glesne and Peshkin (1992) argued, qualitative researchers “avoid simplifying social phenomena and instead explore the range of behavior and expand their understanding of the resulting interactions” (p. 7). Taking their advice, I grounded my study in the phenomenological perspective and sought depth of inquiry over breadth of external validity and generalizability.

In order to situate the approach of my study to theoretical guidelines utilized in previous studies, I employed the Causal Research According to Methodological Approaches guide designed by Amenta (2003). In this definitive analysis, a study is categorized based on its approach to the data. In the event the research is designed to prove a causal comparative case, the suggested approach is a true historical causal comparative design, which incorporates approaches such as cross-national analyses. When the direction of the study is non-causal comparative, the approach suggested is a within country case study, or phenomenological study (p. 94). Since the focus of my study was non-causal comparative, the framework of a within country, phenomenological study fits well with my intention, and was supported by previous research in similar historical studies that examine and analyze data that was not comparative in nature.

My research incorporated a document collection method to analyze historical data related to the U.S. intervention into the Cuban education system between the years 1898 and 1912. The intent of this study was to contribute to the general knowledge of this event and fill in some of the missing gaps of the existing scholarship. I began my study by accepting the stance that historians of the period under study have taken repeatedly in scholarship from 1905-2011, that the U.S. implemented a U.S.-styled curriculum with the intent of annexation of Cuba through

popular acclamation. Through the utilization of primary and secondary data sources, I recovered and analyzed official documents, reports, personal letters, official and personal cables, photographs, and archival data. This information was primarily related to the restructuring of the Cuban school system overall and particularly to that data which examined the implementation of the civics/citizenship/moral education curriculum and the training of the Cuban teachers to this intent. The bulk of the available primary research material exists in the library at the University of Havana, *Biblioteca Pedagógica Félix Varela Morales* in Havana, Cuba, *Biblioteca Centro de Información para la Educación (CIED)* in Havana, Cuba, the National Archives in Washington, D.C. and College Park, Maryland, the Library of Congress in Washington D.C., and the libraries of Harvard University, The State University of New York at New Paltz, The Franklin Institute in Philadelphia, Pennsylvania, and The University of Miami in Florida.

Through triangulation of sources, rather than the use of multiple researchers, I strengthened the value and validity of individual data. Multiple sources that replicate data lend strength by providing different perspectives of the same event or series of events. Triangulation of the source of the information increased the internal validity of the study, and will allow subsequent researchers to replicate portions of the study if access to Cuba again becomes problematic due to political reasons. The triangulation of sources may be easier with some data than with others as there exists little scholarship related specifically to civics/citizenship/moral education in Cuban libraries from this time period that was available for my review.

Audience

This study, while comported as part of the requirements of obtaining a Ph.D. in Social Science education, is also directed towards the current body of scholars interested in the integration of historical and citizenship studies with education practices used by nations to

inform their citizens on civic practices. Additionally, this study is oriented to inform Cuba studies scholars who are interested in the history of education on the island, and the specific events associated with the reconstruction of the island's school system post War of Cuban Independence. The discussion about state focused construction of citizenship has been a lengthy and still ongoing conversation, which began in the Western World with the teachings of Aristotle in his book on politics, and continues today with scholars such as Marshall and Bottomore (1992), Brubaker (2004), Gellner (2006), and many others in the field of political inquiry. Two further topics that Cuban scholars will find of interest in this study are the exploration of the development of the concept of *Cubanidad* or Cubanness as it relates to nationalism and the efforts of Cuban feminists to support the growth of Cuban-centered nationalism post conflict. Current discussants active in the field of civics/citizenship education specifically focusing on Cuba include: Louis Pérez, Richard Gott, Jules Benjamin, Levinia Gasperini of the World Bank, Graciela Cruz-Taura with Florida Atlantic University, and Sheryl Lutjens of California State University, as well as several other scholars. Additionally, my study is designed to inform the broader discussion associated with imperialism/annexation and the use of education to meet those ends.

Data Collection

My initial intent was to base the data collection and theme development of my study in Grounded Theory as it was outlined by Glaser and Strauss (1967). In their theory, the researcher enters the study devoid of existing theoretical perspectives and allows the themes to develop as the data are collected. Through a careful analysis of the research data, commonalities are discovered which are then shaped to define specific themes. Through a process of data coding, research is combed to extract data that are common to existing themes. Subsequent data are then

analyzed against the emergent themes to align common perspectives of authors, or ideas, which is a purely inductive approach.

In a purely inductive, grounded theory qualitative study, the examining of all relevant information on the period of U.S. occupation of Cuba, and the integration of assimilation focused educative practices would be considerable. The subsequent analysis and coding of data would be a tedious and costly process that would not support, in a significant manner, the information collected and extracted. In addition, the data being sought that refers to the topic under consideration could quite easily be lost amid the vast array of competing concepts and emergent themes. A major limitation of this style of study would be the need to review the majority of the existing scholarship that discussed all aspects of this time period prior to determining which themes were important as key focus of my research. Since this general area of the scholarship on this time period is rich in information, a purely inductive approach would consume an indeterminate amount of time, cover areas that are not pertinent to my study, and would be outside the scope of my inquiry. In order to realign the theoretical approach to be supportive of the research, I found it necessary to locate an alternative theory that would accommodate my initial reliance on deductive themes, while still allowing for the inclusion of inductive themes that would emerge from my ongoing research.

I entered this study with a preconceived theoretical perspective, therefore, the strict reliance on Glaser and Strauss (1967) would have been problematic, as grounded theory, as they define it, does not allow for preconceived, or deductive themes. To overcome this difficulty, I relied on the support of Seaman (2008), to adjust Glaser and Strauss's (1967) theory requirements, allowing me the use of a preconceived thematic theoretical approach inside grounded theory. Seaman (2008) argued for the use of activity theory in combination with

grounded theory to overcome the limitations of preconceived perspectives. Rather than focusing on the predictive nature imbedded within grounded theory, activity theory allows for descriptive approaches. Additionally, activity theory places culture and activity as concepts for understanding human actions, and focuses on the interactions of systems and the artifacts of systems such as educational programs (p. 5). Combined, these two theories allows for an abductive approach with both preconceived and emergent themes guiding my research. Having successfully constructed the theoretical aspect of my study through a merger of Glaser and Strauss and Seaman's perspectives of grounded theory, I next turned to my research questions.

Research Questions

Initial coding of themes for the investigatory part of my study is structured on the research questions posed to explore the research problem. Proposed themes designed for initial coding of the combined grounded/activity theory process are expressed below: (examples in parentheses)

Theme 1. Curriculum selection process after the Cuban War for Independence (curriculum lists, school boards, school superintendent directives, directives from the U.S. Military government, school textbooks, teacher instruction manuals)

Question 1. What courses were included in the K-12 curriculum, under U.S. military rule after the Cuban War for Independence, and what perspectives were utilized in their selection?

Theme 2. School and education actors, Cuban and American, post War for Independence (U.S./Cuban government officials and private citizens associated with education or education policy)

Question 2. Who were the influential actors involved in creating the schools and curricula in Cuba after the Cuban War for Independence?

Theme 3. Purposes of U.S. involvement in Cuban education system (annexation, assimilation processes, civics instruction, development of the American Way-of-Life, restructuring of education system to U.S. standards)

Question 3. Did the U.S. try to influence the Cuba education system after the Cuban War for Independence? If so, in what ways?

Characteristics of Participants

Rather than investigating human participants in my study, I recovered data from historical documents. The majority of the documents I analyzed were in English and required no translation; however more than a few of the more important records were in Spanish and located in Havana, Cuba, or were available in libraries or online repositories across the U.S. that specialize in Cuban historical documents and texts. Several of the documents collected during this study required translation from Spanish into English. Although I speak and read at a proficient level in Spanish, I hired a translation specialist at the University of Havana, and in Washington, D.C., for the purpose of ensuring accurate translations and the strengthening of the validity of my data. In addition, as I examined documents in the field, I employed a Machine Language Translation application that provided highly accurate translations of confusing passages. The applications that I employed for field translations were iTranslate and SpeechTrans, both available for the Apple iPad2.

Without human cases, as defined by the Belmont Report and the University of South Florida IRB, I was not concerned directly with ethical issues in my research. However, there are political and cultural issues associated with the collection of this data from locations in Cuba and

Miami. Every opportunity to avoid and mitigate political and cultural issues related to the collection and use of sensitive historical information was taken as I collected data. Although there are few documents from this time period still listed as classified by the United States government, the Cuban government recognizes certain formative documents as *documentos secreto de la patria* (secret documents of the country). These historical documents are open for public display and research; however, they are protected from copying by electronic means in order for the Cuban government to maintain control over what history is released and to whom. To minimize the difficulty associated with this restriction, I collected some of this data when I was in Cuba by dictating the reading of the data into a recorder, and when possible scanning, or photographing documents as it was allowed by local authorities and librarians.

Available Resources

Beginning a study that utilizes as its foundation historical documents required a thorough review of available discussions on the topic of interest. In accordance with the suggestion of Gall et al. (2007), in order to locate the essential sources to begin my investigation, I utilized “indexes” and “bibliographies” of preliminary sources to identify items relevant to my study. By collecting the original source documents listed in several of these preliminary sources I was able to uncover much information that has been presented by earlier researchers and prepare a concise exploration of the literature previously published. Through a review of the responses to the online library queries and text bibliographies, I located the majority of the relevant voices in this discussion.

My second step was to examine the literature reviews of studies that are uncovered in my initial inquiries and identify suggested areas for future research posited by the authors of those studies. Secondary sources such as annotated bibliographies informed my study by providing

several discrete parts of the discussion in one location. The advantages of this process is the ability to quickly assemble a compendium of authors interested in this topic, and obtain an initial review of their positions regarding the topic under study. While the limitations of this process are many, lack of contravening voices and purposeful exclusion, for example, the result allowed for an initial exploration of the discussion and the development of topics of research.

Once primary and secondary sources had been collected, a thorough review of the primary research was undertaken to recognize individual positions, and develop initial themes that are present in the discussion. One of the many steps in the location of sources process was to synthesize the varying positions presented in the literature into themes which then guided my further research. By following these suggested steps normally associated with a literature review, as explained by Gall et al. (2007, p. 98) I located and obtained access to the majority of the positions held by other scholars for inclusion in my study.

Sources for the research phase of this study were located through a combination of the aforementioned literature review process, and the incorporation of snowball styled expansion of sources through the review of authors' presented works and bibliographies. The results of my pilot study indicated that the majority of documents and reports that inform the data collection phase of my study were also available in the U.S. My previous visit to Havana, Cuba had made clear the loss of historical documents on the island due to atmospheric conditions, neglect, and political necessity. What documents that remain on the island are, in many cases, copied in the Library of Congress and the National Archives in Washington, D.C., The University of Miami Library, Harvard University Library, The library of the State University of New York at New Paltz, The Research Library at the Franklin Institute of Philadelphia, and through several online

sources such as the Hathi Digital Trust, and the Google Digital Book Library. All of these resources were extensively queried to collect the data pertinent to my study.

Procedures

Several locations were visited to collect records. At each location, I attempted to locate information from each of the major sources contributing to this historical event. The number of contributors increased rapidly as I delved deeper into the collection process, as each source added, in a method similar to snowball sampling as described by Gall et al. (2007, p. 185), additional sources to investigate. Through a process that recovered and analyzed these new sources, data and additional sources were located that informed my study, and allowed for effective triangulation of information that confirmed previously collected data. I followed the suggestion of Gall et al. (2007) and Patton (2002) attempting to recover more cases for analysis until my data became redundant “and no new information is forthcoming from new sampled units” (Patton, p. 246).

Once several topics had been investigated in depth, I developed themes from my research for further analysis of the data. With developed themes as a basis for further analysis and combining of historical data, I reviewed additional primary and secondary sources at different venues to explore the events that occurred during the time period under study. The purpose of the coding was not to quantify how many divergent points existed, or to count the number of times an event was seen as important in the discussion, but simply to categorize views of other scholars into themes specific to an event in similar areas, such as, curriculum used in Cuba in the years preceding the conflict.

Collection Phase Design

Since I was examining a specific time period in the past, a historical research design allowed me to examine the origins and trends of the data, as well as examine cultural aspects and bodies of work relevant to the time period under study. According to Ecmekci (1997), a historical research design “is a systematic collection and evaluation of data related to the past in order to be able to understand and explain past events or actions” (p. 60). Typically comported in a lineal manner, from the past forward, an examination of the forces present, that directed the changes in the education system of Cuba during this time period, is aided by a study of this type.

In a historical exploration comported in the framework of a qualitative study, the design of research is not easily described. It is neither, as Maxwell (2008) offers, “fixed, standard arrangements of research conditions and methods that have their own coherence and logic, as possible answers to the question, “What research design are you using?””, nor is it a linear progression, a series of steps or procedures to be followed” (p. 214). Instead, a study of this type is more circular in nature; new information as it is collected must be compared against existing themes, and be situated into the interwoven understanding of the topic. While at the same time, segments of linear procedures must be followed in order to ensure validity to your study. As such, the complexity of a qualitative exploratory study requires agility and discipline in order to be comported properly.

The linear segments of my study have been the individual steps taken with primary and secondary sources. By using the same initial queries developed for use at the USF library in Tampa, Florida, I sought to repeat the search process in different locales. Once sources had been identified at each location, I examined the text, comparing the existing themes I had developed from the literature review. During the same reading, I notated new or emergent themes, coding

them appropriately, to compare against other sources. In order to fully explore the primary sources of information, I repeated the search process at each new location. Once the primary and secondary sources had been read to the exhaustion of new information at one location, as described by Gall et al. (2007) and Patton (2002), I relocated to a second facility. This process of repetitive exploration in several locations opened my study to primary documents and scholarly perspectives not available in one single location, and strengthened the validity of my study through the triangulation of sources. A graphic representation of this process is included in Appendix 1 below.

In addition to the circularity provided by several locations for primary research, I also reviewed new information against existing themes in order to verify and code the data. This process can reposition the study continuously due to the development of new and contrary information. Due to this possibility, that some new data may be contradictory to the common discussion, special care was taken to identify supportive evidence of this contravening information and links to other primary research prior to inclusion in the final data. One of the limitations of circular research is the risk of confounding the study with information that is extraneous to the intended discussion. While this is an interesting field of research, it was not the intent of this study to supply new divergent views, but simply to examine the events that transpired, analyze their significance to the attempted annexation of Cuba by the U.S. government, and present them in a coherent manner for examination and use by other scholars.

Analysis of Data

During the process of data collection I pre-coded the data for analysis, by first comparing the extracted information to the existing research questions to determine if they answer these questions adequately. These initial groupings, called topics by Maxwell (2008), are generalized

concepts that fit closely with the existing research questions. In a return to the circular methodology of my data collection process, I revisited the wording of the questions to determine if they posed the proper inquiry in light of the collected data. In a study of this type, Maxwell (2008) argues for a continuous reassessment of position and the constant revisiting of data, inquiry, and findings as important to determine the strength of your findings.

In addition to the comparison of data to preconfigured questions, I constructed additional inquiries that emerged from the investigation. In this manner, data that were sifted from the research that did not fit the preconceived inquiry of the research acted to further inform the study. This process is supported by Maxwell (2008), who argues for the simultaneous collection and analysis of data in order to “progressively focus your interviews and observations, and to decide how to test your emerging conclusions” (p. 236). What emerged from the revisiting of the data were theoretical categories that fit more closely with the intended themes created from the research questions, and was in alignment with the abductive structure of my study.

The final step in data analysis was connecting the themes into a coherent strategy to present the information. The strategy I used is an integrated presentation process, rather than a strict linear, or grouping method. The limitations associated with the strict linear method deal with inconsistencies in timeline formation, and the difficulty in representing information that illuminates a concept out of the linear construct of the model. Likewise, the grouping method often represents information in a sterile contained concept that fails to show temporal connections to associated information. Due to the nature of this study, an integrated process of presentation was used and the data was sorted to support the presentation.

Validity

Maxwell (2008) warns against two specific threats to validity: researcher bias, and the effect of the researcher on the study, also known as reactivity. The only one of these two that was germane to my study is researcher bias. It is doubtful that my investigation of existing historical data affected the collection of the data, or the data itself except in extreme cases. For that reason reactivity will not be a concern. However, the effect of researcher bias can be considerable. Simply the choice to study a particular concept or field requires a bias towards that field of study, therefore it is all but impossible to control for researcher bias. The normal approaches used in quantitative studies to control for these variables are not as appropriate in a qualitative study as controlling for preconceptions or values would be difficult. Additionally, as Maxwell (2008) asserts, it is not necessary to “standardize the researcher to achieve reliability”, but simply to acknowledge that bias does and will exist in the study (p. 243).

Controlling for validity and reliability in my study was ensured through the triangulation developed from the multiple points of collection previously described above. Both Gall et al. (2007) and Maxwell (2008) discuss the importance of triangulation as a method of ensuring validity. Rich data are a second aspect both authors ascribe to, and are represented in my study through the snowball sampling style of developing additional resources for investigation. A third common approach suggested by Maxwell and Gall et al. is disconfirming case analysis. Disconfirming cases are data that does not fit with the commonly constructed narrative of the event. The recognition and inclusion of counter-narratives are effectively demonstrated through data collection in Cuban libraries where a Cuban-focused perspective relating to the occupation has emerged in the years following the Cuban revolution of 1959.

Summary

The construction of the methods section of this study required not only an analysis of the data collection processes, but also investigation into the appropriateness of the framework of the investigation. The explorations of guidelines that differentiate the two major types of studies helped inform me of the benefits of a Qualitative framework of this study. In addition, the integration of Glaser and Strauss (1967), Strauss and Corbin (1990), and Seaman's (2008) perspectives on active grounded theory established the theoretical framework for data collection. I relied heavily in developing this methodology on Patton (2002), Gall et al. (2007), and Maxwell (2008), to inform my construction of the design, procedures, and my analysis of data sections. In addition, Gall et al. (2007) and Maxwell (2008) proved invaluable in the development and considerations for the validity and reliability aspects of my design. In the chapters that follow, the structure established by this section provide the framework for presentation of my results and the discussion of my findings.

Chapter 4

The foundation of change: Events, actors, and cultural adaptation

The purpose of this study has been to explore the condition of the Cuban education system, and the changes imparted upon that system, by the United States Military Occupational Government, in Cuba, during the period of U.S. occupation and primary control over the Cuban school system, 1898-1912. In order to reinvigorate the stalled discussion of the Cuban education system extant in the late 19th – early 20th century, by United States and Cuban scholars, I believe it is necessary to revisit the events that culminated in, what was up to then, an unprecedented reconstruction of an education system *en toto* by a foreign occupational government. Over a period of less than four years the U.S. Military Occupational Government of Cuba restructured the existing system of schools on the island, from the method of management that had been crafted during the previous 100 years under the Spanish, to one designed to match the then existing school system of the United States.

These changes were far reaching in their scope and included the introduction of courses of study normally found in the U.S., including civics education and the study of English, the restructuring of the school calendar, the introduction of teacher examinations, and school regulations crafted from the Ohio School Law. Further changes included the introduction of United States-styled teacher requirements specifying courses of study to be used in Normal Schools (secondary schools for teacher education), licensing requirements and processes, school textbook selection, classroom furniture design, procurement, and distribution, selection of student assessment methods, English language instruction, the introduction of summer schools

for teacher training, and the insertion of a new schedule of school holidays. Many remnants of this attempted adaptation of the education system on the island, crafted under the U.S. intervention, are still apparent in the current organization of schools in Cuba today. Although these remnants have been adapted from their original intent by Cuban educationalists and government sources over the ensuing century, many still hold the shape originally imparted on them by the U.S. Occupational Government. Clearly, a deeper understanding of the Cuban education system would benefit from an exploration and analysis of the processes that led to today's methods of public instruction in Cuba.

Review of Theoretical Framework

Rather than beginning this study as many historical research projects are undertaken, by examining a stack of documents and reports from an era and then sifting through the data to ascertain the events of interest and their linkages to a common incident; I began my exploration with some preconceived perspectives of what had occurred as a result of earlier research on political and historical issues of this time period. In addition, my pilot study had revealed original data in the form of U.S. Military Reports that supported the premise that factions within the U.S. government, abetted by commercial interests from the United States and Cuba, were interested in reforming the education system of the island as a means of ensuring eventual annexation of Cuba by the U.S. Scholarship that I collected in these earlier studies indicated that there existed a historical interest by the U.S. in the annexation of the island dating back to the Jefferson presidency. In addition, my previous investigations of the Cuban War of Independence and the Spanish American War had shown that the U.S. Military Occupational Government attempted changes in the education system of the Cuban schools intended to achieve an end result of annexation early in the 20th century. In essence, this prior research I had undertaken

effectively filtered the data of the time period under question and directed my attention to the several coalesced areas of inquiry that are stated above.

The theoretical method that supports my process of inquiry is an amalgamation of two aspects of grounded theory. The first, a purely inductive grounded theory study, as defined by Glaser and Strauss (1967) allows for a structured analysis without preconceived perspectives to direct my study. I found that this theoretical perspective was necessary in order to value new themes that would emerge during research. The second, Seaman's (2008) development of activity theory as an integral aspect of grounded theory allows for preconceived perspectives to guide research under grounded theory principles. Without Seaman's (2008) adaptation of grounded theory guiding my research, it would have been very difficult to begin a study of a historical era with any preconceived awareness of what could have occurred. The combination of these two views permitted an abductive approach that allowed for both preconceived theories and emergent data to guide my research. The inquiry process that I followed during my research is outlined in appendix 1 below. This pictograph depicts the circular method of inquiry undertaken at various repositories of data followed by an analysis of the collected information and the development of further themes for additional research. In each area of inquiry a preconceived concept was tested through online and original document searches, followed by the analysis of the collected information from that library or archive. After the data was combed for existing themes, new themes emerged that were then subject to the same process to which the original theme was treated. By repeating this method at various libraries and archives in the U.S. and Cuba, the entirety of my data was collected. With the intent to explore the above noted questions, analyze the results, and respond with enough force to reopen this shuttered area of

scholarly research in the transformation of the Cuban education system at the termination of the 19th century, I began this study.

Restatement of questions

Beginning the research phase of my study I anticipated answering three questions to inform on the nature of the changes made to the Cuban school system during the U.S. Occupation 1898 through 1902. Based on the circular nature intrinsic to my methods for this study, I have collected sufficient information to answer these three inquiries. The majority of this data emerged from the reading of the primary reports, original letters, and the associated documents specific to this subject. My three questions investigate, in part, what occurred during the attempted transformation of the schools by the U.S. occupational government. While these questions do not, by themselves, explore the totality of the attempted transformation of the schools in Cuba, they serve as clarification of several vague points regarding what existed and what changes were attempted under the hands of the U.S. occupational force. It is hoped that this analysis will further spur the examination into this time period in future studies by establishing baseline information regarding courses taught, individuals involved, and areas where influence was brought to bear on the Cuban culture and school structures.

My first inquiry sets down a baseline for review of the new course of studies in the public schools of the island. *What courses were included in the K-12 curriculum, under U.S. military rule after the Cuban War for Independence, and what perspectives were utilized in their selection?* This question examined the standard curricula in elementary and secondary schools as they were established by the U.S. Military Occupational Government of Cuba in the period following the cessation of hostilities in 1898 and continues up through the transfer of power to the Cubans on May 20th, 1902. The initial theme with which I began my investigation focused

on curriculum selection processes after the Cuban War for Independence and included subtopics such as curriculum lists, school boards, and school superintendent directives, directives from the U.S. Military government, school textbooks, and teacher instruction manuals.

My second inquiry focused on the individuals involved in the creation and early superintendence of the school system, the development of the various school laws, and the authors of new curricula during the occupation. Stated as: *Who were the influential actors involved in creating the schools and curricula in Cuba after the Cuban War for Independence?* This question examined those individuals including native-born Cubans, former Spanish citizens, members of the United States Military and Government, as well as U.S. civilians who had been involved in the remaking of the island's school system. It is through this analysis of the actors involved in the attempted transformation process that a glimpse of the various factions in contest over annexation and independence takes place. The primary themes that were used to begin my search on this topic included school and education actors, Cuban and American, post-War for Independence that included U.S. and Cuban government officials and private citizens associated with education or education policy.

The third inquiry in this study is a question that delves into the methods of influence attempted by the U.S. Military Government, Cuban and U.S. civilians, and Spanish citizens in their effort to restructure the Cuban education system. With this question I was seeking to answer the question: *Did the U.S. try to influence the Cuba education system after the Cuban War for Independence? If so, in what ways?* This inquiry explored the purposes of U.S. involvement in Cuban education system that may have included annexation, assimilation processes, civics instruction, development of the American Way-of-Life, and the restructuring of the Cuban education system to U.S. standards. Other themes included in the initial search

process were directives from civilian government authorities in the United States, U.S. Military Orders issued by the occupational government, changes in the structure of laws on the island, the introduction of new holidays in the school calendar of Cuba, and various other methods of directing actions in support of or contrary to annexation.

Development of Themes and Collection of Data

Following the path set down by my preliminary themes, and utilizing the results of my pilot study, I began to investigate the key topics associated with each question. As I started to analyze the data I had collected at several locations and from internet sources, new themes began to emerge regarding the control over education, teacher training, school laws, civics education, and education practices in general, on the island of Cuba. Following Maxwell's (2008) lead, I continuously repositioned my inquiries in order to ensure that my data were pertinent to the questions at hand. In order to structure the inquiry process so it could be replicated at each location I began by utilizing the preconceived themes associated with each of my questions. My initial inquiry was at the University of South Florida utilizing the advanced search feature of the online library. Each of the preconceived themes was typed into the library search engine to solicit a basic return. The results of the search were catalogued, investigated, and analyzed for themes in alignment with the preconceived concepts. If the search produced few or no results, I moved on to the next inquiry and replicated the process with a new theme. In the event that the search produced several areas of interest for further research, I adjusted the search parameters to include those results from a period between 1880 and 1920. Again I relied on Maxwell (2008) to guide this process of continuous assessment and collection of data. The limiting features and continued analysis of new data were then included in the subsequent searches at the different locations. Through this process of refinement and restating of the inquiry I was able to collect

information regarding my topics of interest from a variety of locations and sources. In addition, many of the library and internet search results led to older texts located in the National Archives and the Library of Congress as well as several other university libraries.

Themes that emerged from the combing of data relating to question one resulted in the following areas of interest: U.S. military reports, the report from the commissioner of public schools in the U.S., reports from the several Cuban educationalists assisting the U.S. government in the restructuring of the schools, letters sent between Cuban citizens and the various military officers in Cuba, and plans of study drawn up by members of the military government, Cuban civilians, and civilian employees of the military government. Each of these reports and letters contained sections devoted to the restructuring of public education in Cuba with either lengthy passages on suggested courses of study, or brief listings and general outlines of the coursework recommended. While earlier reports from 1899, such as that of Governor-General John Brooke contained brief statements regarding the coursework of the schools on the island, others, for instance those from the provinces of Mantanzas, Santa Clara, and Santiago, were extensive in their treatment of the school's course of study.

I have divided the reports from the various military and civilian agencies into two sections in order to answer question one with better clarity. The first section includes those reports from the provinces of Cuba and focuses on the time period between 1898 and 1899 before the Military Governor released the island-wide school laws. In these three early reports from Leonard Wood, José Monté, and Captain Samuel Small, a snapshot of the attempts at organization and suggested coursework can be seen at the earliest time of occupation. The later reports from Alexis Everett Frye, Enrique José Varona, and Lieutenant Matthew Hanna set in place the official school law for the entirety of the island of Cuba. While these later school laws

are long on regulation and the development of the infrastructure of the school management, they are short on information regarding specific coursework. Fortunately, enough information exists in these several reports to fully inform question one.

The majority of information collected to answer question one came from the National Archives and the Library of Congress both, in Washington, DC. These two repositories contain the civilian records from the military reports filed during the occupation of Cuba. In addition they also contain numerous collections of letters and original documents associated with the civil activities of the military governors of Cuba. Additional information was collected in the form of pdf electronic books from Hathi Trust and Google books. The majority of these pdf files were of the annual reports from the military governors. By retrieving these reports from the online sources I had a ready reference to review and verify information collected while visiting the archives. Additional military reports were collected and reviewed at the National Archives in College Park, MD. The records contained there are those associated with specific military orders issued during the period of U.S. occupation. Copies of the letters and local reports from the provincial military officials were only available for review in the U.S. archive buildings. In all of these locations non-flash photography was permitted allowing me the ability to collect digital copies of original documents for in-depth review following each archive visit. After several visits to the National Archives and the Library of Congress, the Franklin Institute in Philadelphia, and repeated searches on the internet, I reached the point that Patton (2002) defines as redundant data with no new information or sources available to inform my study.

Four main themes emerged during my initial inquiries focused on question two. These included military officials in charge of the island and the several provinces, school superintendents and commissioners, Cuban and United States civilian employees of the U.S.

military, and U.S. government officials. In my analysis of question two I treat each of these influential individuals separately and in comparison (when practicable) in order to highlight their impact on the transformation process. Information that informed this question emerged from sources as diverse as those of the several libraries in Cuba I visited during my pilot study, books purchased while in Cuba that were written in the late 19th and early 20th century, the online library from the University of Seville, Spain, Harvard University's online library, the State University of New York at New Paltz, The Franklin Institute in Philadelphia, PA., and several online sources.

Since many of these individuals authored one or more of the several reports about education on the island of Cuba, there was copious information available to analyze their actions and intended direction of the education system. The availability of information from Cuba that was published on the island both before and after the revolution of 1959 has allowed me to locate contravening perspectives regarding the individuals I was examining. The ability to triangulate sources and theoretical perspectives, even those colored by political perceptions, has aided in a deeper understanding of the impact these individuals had on the system of education in Cuba.

In question three the themes that developed from my research diverged into two main topics, culture and tangible affects. The main theme that focused on culture included subthemes such as the school calendar, school holidays, introduction of new coursework, and the attempted restructuring of religious beliefs. In the tangible aspect, subthemes such as the selection of school books, school furniture, teacher training, the introduction of U.S.-styled teaching practices, and the infusion of North American university study for Cuban teachers were predominant. Data for this portion of the study was collected from a wide range of repositories that included many texts written during the mid to late 19th century. These rare texts supplied

much of the cultural perspective information from which I was able to identify the specific changes attempted by the U.S. actors. Many of these older works were available through Google Books due to their digitizing of the Library of Graduate Education at Harvard University in Boston, MA. and several other well stock libraries from the U.S. and Spain. The comparative information was drawn from the previously identified annual reports of the military and civil officials directing the government of Cuba. Collectively, these divergent sources have provided a clear picture of the attempted influence the U.S. sought to bear upon the people of Cuba.

One benefit that I have enjoyed during this study is the powerful search engines and the plethora of digitized information that exist on the internet. During my initial sequence of inquiries I was able to secure access to numerous libraries and their catalogs from my home computer. This simplified the search process necessary when I visited the Library of Congress, National Archives, and the libraries of several Universities. In addition, the Hathi Trust and Google Book online repositories have proven invaluable in the securing of 19th century texts that are available only in print form from archives, hours and miles distant from my home. Through the use of the internet search features, those of the University of South Florida, University of Havana, University of Seville, Spain, Ecured in Cuba, and various other online access points, I have collected much more information on this topic than I anticipated at the beginning of the study. Harvard's development of a Chair in Latin American Studies near the beginning of the 20th century created a repository of texts specific to this time period authored by many of the scholars under examination. Their extensive collection has been digitized and made available to the general public for research. This has allowed for the level of detailed investigation necessary to deeply examine this topic. One unanticipated benefit has been the exponential growth of additional avenues for further study upon the completion of this project.

For each of the three questions below I present my information using an integrated arrangement method. Integrated arrangement is the process of presentation by similarities of theme rather than through a strict grouping of types or the linear method of subsequent events. The use of this method is necessitated by the system of arrangement I have chosen for analysis, and to provide a more coherent manner to showcase the integrated nature of these individuals and events. In many instances in the data presented below, the individuals involved in the events under study appear at different times and in different places and areas of responsibility. In addition, quite a few themes cross several years and were transmitted through several plans of education and military reports. If a strictly linear presentation method was used, the opportunity for confusion of the presented data would have increased considerably.

In order to proceed with the presentation of data collected to respond to my inquiries, I first outline the events that occurred during the initial months of the U.S. occupation. The confusion that existed on the island following the conflict was exacerbated by the total lack of facilities and the poor condition of the island's infrastructure. Messages, personnel, and supplies often had to travel by ship rather than overland. In addition, many of the people on the island were in poor physical health due to the effects of the conflict and the Spanish *Reconcentrado*. Despite the almost six months available to plan for the transition, the lateness of the treaty of Peace, signed on December 10th, 1898, in Paris, France, had stayed the hand of the U.S. government in their preparation for the transfer. As such, it was not until mid-December of 1898 that the President acted to name a Governor-General to manage the affairs of the island. Once he did, the result was a flurry of General Orders and restructuring of command positions that led to additional confusion and often outright hostility from the native population. In several instances, the confusion created by poorly translated orders from the Governor-General elicited a flurry of

negative responses in the islands newspapers. During the first months of the occupation, the maligned sensibilities of the Cuban people, in some instances, were only assuaged by a retraction of the published laws or orders by the Governor-General.

Setting the Stage

On July 17th, 1898 U.S. forces under the command of Major-General William R. Shafter (1835-1906) received the surrender of the Spanish garrison in control of Santiago de Cuba. During the months that followed this capitulation, and up through the transfer of control of the island in Havana, Cuba on January 1st, 1899, U.S. and Spanish forces slowly traded places. With a buffer of U.S. troops between the former antagonists, as the Spanish troops vacated an area, the Cuban army took command “maintaining order, and, generally, providing police duty” (Brooke, 1900, p. 6). The Cuban army was followed shortly after by the bulk of the U.S. Occupational Army, who began to fill the needs of the villages and towns, first performing emergency relief operations, and soon after in civil government positions.

In the months between July 17th, 1898 and December 31st, 1898 the War Department began a restructuring of the command on the island to prepare for the coming civil government. However due to the uncertainty produced by the lengthy discussions underway in Paris to transfer sovereignty from Spain to the U.S.; the planning stage was limited to preparation and attempting to ensure that the Cuban people were not starving (Letter Brooke to Brigadier-General Davis, Jan 7, 1899). Although called a civil government, the U.S. occupation was led and manned almost entirely by seasoned U.S. Army military officers. As such, they responded solely to the orders of the President and the Secretary of War, giving little credence to demands and requests from members of the U.S. Congress or the Cuban people. Following the signing of the Treaty of Peace on December 10th, 1898, in Paris, France, a series of General Orders were

issued by the War Department in Washington, D.C. directing the repositioning of officers in advance of the transfer slated for January 1st, 1899.

The transfer preparation got underway in earnest with the issuance of General Order No. 184 on the 13th of December, 1898. This order established the Division of Cuba and assigned Major-General John Brooke (1838-1926) as the Governor-General of the island. Brooke arrived in Cuba on the 27th of December, 1898 and immediately set to work on establishing the structure of his command (Brooke, 1900, p. 5). December 30th, 1898 saw the issuance of General Order 191 from the War Department that established two initial military departments in Cuba. The first was the department of Havana with Major-General William Ludlow (1843-1901) in command. The second of the two military departments was the province of Havana with Major-General Fitzhugh Lee (1835-1905) in control of the area surrounding the capital (Brooke, 1900). On December 31st, 1898, in order to provide military control over the entirety of the island post-transfer Major-General Nelson Appleton Miles (1839-1925), who had risen to the post of Commanding General of the Army following the conclusion of the war in Cuba, issued General Order 193 to establish six provincial departments on the island.

For each of the six, Pinar del Rio, Mantanzas, Santa Clara, Puerto Príncipe, Havana, and Santiago de Cuba, Miles assigned a military officer to command the department. General Order 193 also added the Isle of Pines to the department of the province of Havana. In Pinar del Rio, Brigadier-General George W. Davis (1839-1918) took command, in Mantanzas, Major-General James H. Wilson (1837-1925) was assigned the top post, and the Department of Santa Clara saw the assignment of Major-General J.C. Bates (1842-1919) as the commanding officer, with Puerto Principe receiving Brigadier-General Louis H. Carpenter (1839-1916) (Miles, 1899).

General Order 120 of July 1, 1899 consolidated the two provinces of Puerto Príncipe and Santiago de Cuba into one department with Brigadier-General Leonard Wood as the commanding officer (Miles, 1899). General Wood had remained in Santiago province during the period of transition July, 1898 to December, 1898 and into the year of 1899; as such he was the senior officer in the area and received the command position from Major-General Miles.

At twelve noon on the first of January the last Spanish Captains-General of the island of Cuba, Adolfo Jiménez Castellanos (1844-1929) turned over sovereignty of the island to the control of the U.S. military government. According to Trumbull White, a newspaper reporter and historian, in his account of the event printed in his work *United States in War with Spain and the History of Cuba (1898)*, Castellanos arrived first, shortly before noon accompanied by his aides, all attired in their dress uniforms, denuded of all medals and insignia. The U.S. line officers arrived at ten minutes before noon and were in the “fullest full dress, the broad gold sashes of Major-Generals across their breasts” (White, 1898, p. 576). White also states, in a dismissive tone, that following the U.S. generals were a small group of Cuban officers.

After them came a little contingent of insurgent chiefs, brigadiers most of them:

Rodriguez, commanding the insurgents in Havana province; Menocal, Laret, Jose Miguel, Julio Sanguilly, Nodarse and Agramonte, surgeon-general to the Cuban forces.

Their severely plain blouses of blue serge were in startling contrast with the gorgeous American uniforms. (White, 1898, p. 576)

In the brief ceremony of transfer, Castellanos stated the following to the U.S. officers present as the proclamation of official transfer of the island of Cuba, Puerto Rico, and the Philippines from Spain to United States control.

Gentleman, in accordance with the treat of Paris, it devolves upon me to declare on behalf of my country and my king that from this moment Spanish sovereignty in Cuba is ended, and to deliver the island to the American commission of evacuation. I obey and respect the order which my country has laid it upon me to fulfill, and I declare most solemnly that I shall be the first one to render obedience to the new government. I speak as well for my soldiers. I trust our future relations will be friendly and helpful. The consideration with which we treated the American army while it was our guest will, we hope, be given us until the evacuation of the island is completed. (White, 1898, p. 577)

Acting in his capacity as president of the evacuation committee, Brigadier-General James Franklin Wade (1843-1921), received General Castellanos' surrender and promptly transferred sovereignty over the island to Governor-General John Ruller Brooke (also spelled as Rutter) (White, 1898). While other ceremonies took place on the island of Puerto Rico and in the islands of the Philippines at a later date, the one in Cuba was recognized by the U.S. and Spain as the official transfer of sovereignty.

To answer the question of what courses were included in the standard curriculum in place for K-12 classrooms once the U.S. military took command of the island of Cuba, It was imperative that I reviewed the available reports from the civilian and military officers from the U.S. as well as those who were residents and inhabitants of Cuba. The results that informed my first question were drawn from reviews of these military reports and civilian documents.

Question 1:

What courses were included in the K-12 curriculum, under U.S. military rule after the Cuban War for Independence, and what perspectives were utilized in their selection?

During the first months of the U.S. occupation of Cuba very little was done either by the United States occupational army or the Cuban educators to restart the schools on the island. As most scholars of this time period have reported, the schools were in disarray across the island, with little resembling education taking place anywhere except the city of Havana. Major-General Leonard Wood stated in his annual report from Santiago de Cuba dated September 1, 1899, that the state of “education, both public and private, is backward” (Wood, 1899, p. 15). He further asserted that due to a lack of transportation, access to schools was preventing attendance except at the center of towns. He basis the dearth of opportunity in education on a “lack of means” stating that “no school property exists, nor is there a single endowment of any nature for educational purposes in the Province” (p. 15-16). Even in the capital of Havana, few schools remained in operation following the War of Independence. Those that were, according to Enrique José Varona in his report dated September 14, 1900, “were characterized by the most absolute neglect of everything connected with instruction” (Wood, 1901a, p. 57). One of the more damning accusations of the condition of the schools in Havana came from Varona as well. He asserted that the institutes of secondary education “were only such by name” with professors of these institutions lacking in skill and morals (Wood, 1901a, p. 57).

Nothing was taught in them, and, on the other hand, they were the scene of the most barefaced traffic in certificates of excellence and degrees granted to the pupils. There were institutes, like that of Habana, where such certificates were subject to a regular tariff. Students would leave these colleges duly furnished with bachelor degrees, but could not write a fairly well spelled letter. (Wood, 1901a, p. 57)

Varona, who held the chair of philosophy at the University of Havana, was in a unique position to observe and critique the school systems of the island under the Spanish. His time spent in

universities in Europe and the U.S. had given him a view of the education practices underway in those regions of the world. As the Secretary of Public Instruction following José Lanuza, Varona became even more intimate with the conditions and obstacles facing those who wished to reform education in Cuba.

Packard, Late 19th Century Education in Cuba

One of the earliest assessments of education on the island from the U.S. perspective was undertaken by Robert L. Packard, a specialist working for the U.S. Bureau of Education in Washington, DC. Packard was given the responsibility to review the education systems of Cuba, Puerto Rico, and the Philippines in 1897. His extensive and illuminating report on the status of education was published in 1899 and helped inform the U.S. government regarding the actions associated with the education systems necessary on all of these islands. It is not known if Packard visited the islands personally, as his references are to reports produced by others with little firsthand evidence offered. However, his essay on the island's education systems had collected some of the more important information regarding attendance, number of schools and teachers, as well as the expenditures for education on the individual islands and within the provinces on each island. For those primary schools that were in operation following the conflict, the course of studies that should have been followed is listed by Packard (1899) as the following:

- (1) Christian doctrine and sacred history adapted for children; (2) reading; (3) writing;
- (4) elementary Spanish grammar and orthography; (5) elementary arithmetic, including weights and measures; (6) elements of agriculture, industry, and commerce, to be varied according to locality. (Packard, 1899, p. 953)

Packard obtained this list from *Resumen de la legislación de primera enseñanza virgente en la isla de Cuba* (Collection of the legislation of primary instruction existing in the Island of Cuba), published in 1895 by José Estebán Liras. For Superior Level primary instruction, he quoted Liras as stating that a higher level of the foregoing list is the underpinning of superior education, with the following list of courses necessary to complete this higher level:

“(1) Elements of geometry, linear drawing and surveying; (2) rudiments of history and geography, especially Spanish; (3) elements of physics and natural history adapted to the more common necessities of life” (Packard, 1899, p. 953). Packard (1899) also quoted Liras (1895) as listing the requirements for girl’s schools to have three fewer courses that exist in the boy’s schools. The three redacted courses were listed as numbers (6) from the primary level and courses (1) and (2) from the superior level. Instead of these three, courses in domestic hygiene, “women’s work”, and elements of drawing were to be inserted (p. 953).

Captain Samuel Small, the Superintendent of Public Instruction in the province of Mantanzas also decried the condition of the schools as “a system in name only” and that the method of instruction was similar to what had been available in the schools of the U.S. fifty years past (Small, 1899a, p. 1). Small also derided the teachers as not providing much teaching stating that “very little original instruction is given by the teachers in the school rooms, very little study made of the individual talents of the pupils and very little effort expended to stimulate personal ambition for an aggressive and expert education” (Small, 1899, p.3). This report produced by Captain Small was in response to a request from Governor-General Brooke to examine the condition of the schools and the methods of instruction in Cuba.

Gonzalo de Quesada (1905) agreed with Packard (1899), Small (1899), and Wood (1900) in their assessment of the Cuban education system. While offering that if the schools of Cuba

had been properly funded they would have been “as practical and complete as in any country in the civilized world”, he also acknowledged that “the appropriations for the schools were far from adequate and their administration most imperfect” (p. 274). Many other observations and reports from native Cubans to U.S. occupiers agreed that the school conditions were far from optimum and needed an extensive revision. Included in this need for reform was the legal mechanism that created the schools and supported their existence. School laws in Cuba had undergone numerous changes in the decades since the first one was instituted by the Spanish in 1842 (1844). As the U.S. took control over the island the schools were in disorder and the law under which they existed was in as much confusion.

Since no specific school law was established by the U.S. military government of Cuba during the first year and a half of occupation, July of 1898 through December of 1899, the school law that was created under the Spanish, last revisited in 1880, would have been the one the schools in operation would have followed in 1898-1899. Based on Governor-General Brooke’s “Proclamation to the people of Cuba” dated January 1st, 1899, the existing school law of 1880, as a part of the civil and penal code of Cuba, would “remain in force, with such modifications and changes as may from time to time be found necessary in the interest of good government” (Brooke, 1900, p. 7). Under this law, the *Plan de estudios para la isla de Cuba de 1880* (Plan of studies for the Island of Cuba of 1880) that was the school law in force when the island transferred hands to the U.S. occupational government would have continued until changed by new regulation.

General Wood alluded to the retention of the Spanish Plan of Instruction of 1880 in his report from 1899 where he stated that the “retention in full force of the Spanish legislation relating to public instruction has had the effect of preventing the establishment of a complete

system of public schools in this Department” (Wood, 1900a, p. 26). Wood’s concern is evident in his report. Of the six provincial governors on the island, Wood had been in his location the longest. While he did not achieve command status until July 1st, 1899, Wood had been a line officer in that province since the war concluded and was in a clear position to witness the situation regarding the lack of education in his area. General Wood was an ardent annexationist and decidedly anti-Spanish in his view of the laws of Cuba. In his report submitted July 1899 he openly dismissed the school law as worthless, “antiquated and absurd legislation” and chides the Governor-General for not acting on his proposal from January of 1899 to reform the schools on the island (Wood, 1900a, p. 27). While others have expressed views of the Plan of 1880 as “practical and complete” (de Quesada, 1905, p. 274), Wood offered his own perspective stating: “Nothing worthy of the name of public schools ever resulted or could ever result from such a law, and so long as it continues in force not much improvement can be looked for” (Wood, 1900a, p. 26).

School Board of Santiago under Major-General Leonard Wood

Wood had acted under his own initiative to investigate the current state of education in Santiago Province. Assigning four members of his staff, General Demetrio Castillo of the Cuban Army, Major James E. Runcie, U.S. Volunteers, Captain R. G. Mendoza, U.S. Volunteers, and Dr. Rupert Norton, U.S. Army, to this task in December of 1898, the group responded on January 4th, 1899 with a comprehensive plan of education for the island (House of Representatives, 1900, p. 843). Wood forwarded the plan of education to Governor-General Brooke on January 25th, 1899 and awaited further instruction on the reforming of the schools in his province and across Cuba (House of Representatives, 1900). The plan that Wood was proposing was not a complete plan of education. It was designed to address the most pressing

need in the eyes of the General. Primary education at both levels, elementary and superior, had crashed to a halt during the conflict and had not rebounded following the war. Wood and his staff believed that the restoring of the primary levels of education would be the beginning needed to restart education on the island; secondary education would be put in place when the funds were available. Wood's staff had performed an investigation into the prior plans of education under the Spanish and had decided that they could adapt some of the existing Spanish legislation to quickly bring the primary grades back on track (House of Representatives, 1900).

The investigation was given the unwieldy title: *Report of the board appointed by General Orders, No. 2, Headquarters Department of Santiago de Cuba, Civil Department, January 4, 1899, For the purpose of formulating a scheme for public education in this province.* The Board of four members drafted 13 articles designed to cover the basic needs of the primary levels of education in the province of Santiago de Cuba. They began with a review of the history of education plans on the island of Cuba starting with the law of 1842 (1844). The review covered the laws of 1857 and 1863, showing how these plans of education added changes and requirements to the previous laws intended to promote the cause of public education on the island. The courses of instruction they illuminated as existing under the Spanish are those listed above from José Liras' work from 1895. Some discussion is given to the requirements of population and the type of schools required by the earlier legislation. This is followed by statements regarding attendance and the terms and sessions of the schools under the Spanish. Next, the three layer council of schools was presented showing how all major decisions were directed upwards to the Superior Council of Education in Havana (House of Representatives, 1900).

Pay, pensions, and tenure of the teachers was also discussed in the board's report with emphasis placed on topics such as teacher residence in the school houses and the difference in pay for teachers of incomplete schools, or schools that were not able to teach the complete curriculum. Additional topics such as school inspectors and reports along with school property and supplies were given brief mention. Textbooks in the Cuban schools were said to be used extensively throughout the grades from the lowest to the highest levels. Texts for use in the schools under the Spanish plan were to be taken from a list published every three years by the Superior Council of Education in Havana. No text was to be used in a classroom if it had not been approved by the Superior council, nor were any books to be used for the teaching of religious doctrine unless they had been approved by the ecclesiastical authorities of the town (House of Representatives, 1900).

The "Race Question" was the topic of the next section in the review and here the Spanish appeared to get high marks from the Board. One of very few quotations from the Spanish law was reprinted in the section on race, and it appeared to have been included as a statement of support. Declaring that the primary interest of the state was "the sacred duty of teaching the ignorant, a duty that had been neglected for ages in regard to this unfortunate race", the Board seemed to be approving of this provision and seeking a similar section in their proposed law (House of Representatives, 1900, p. 853).

A relatively brief but poignant section on the connection between the Church and the schools was treated in the historical section's final paragraphs. In their presentation of the role of the Church in the practice of education on the island of Cuba, the board appeared to be expressing their displeasure with the methods through which the Crown attempted to bind the school and the ecclesiastical processes. In each of the five aspects the board discussed regarding

religion, not one was shown to be a positive influence, but rather, each was presented as an apparent negative effect. Church and school would not equate as equal partners for the U.S. officers educated under a secular system, and the thought of a religious agency having authority over public education must have appeared as an anathema. In their closing comments, the Board made an interesting observation. While not overtly critical of the system of education under the Spanish, with the exception of their unstated beliefs regarding the arrangement between the Church and the schools, they cut to one essential point that was important in their analysis. That the system of education on the island of Cuba had been run by “officials who were really aliens in the country and quite free from all responsibility to the people whose interests were entrusted to them, left everything to be desired” (House of Representatives, 1900, p. 853).

The Board’s suggested plan of education springboards off of a list written in 1888 by an unnamed author that could be José Liras. This list of immediate needs is short, containing only eight items and appears to be in no specific order of importance.

First. Normal schools.

Second. A complete plan of studies and courses of instruction.

Third. A codification of laws and regulations on educational subjects.

Fourth. Suitable buildings for schools, to be erected for school purposes.

Fifth. Sufficient pay for teachers.

Sixth. A corps of capable inspectors or superintendents.

Seventh. Due consideration, in appointments of teachers, to ability and length of service.

Eighth. For each 1,000 of the population at least one school for boys and another for girls, of the lowest primary grade. (House of Representatives, 1900, p. 854)

The Board established their purpose as creating a system of schools for primary and secondary education, or as they were known in the U.S. at that time, primary, grammar, and high school. These schools are to be free to all and were to be provided for from public funds, with enough schools to serve the needs of the population of the region. The administration was to be of the highest efficiency, with a focus on providing the education as economically as possible. Finally, the Board suggested that the schools follow courses of study that prepare the students for the changed conditions of sovereignty (House of Representatives, 1900). This statement was an allusion to the need to incorporate instruction in English and Civics into the course of studies.

The Board of Santiago's first proposal was to undertake a census of the children of school age for the purpose of determining the number of schools in each age category and physical locations. The census would, according to the Board, list children by three separate age groups, six to ten, eleven to fourteen, and fifteen through nineteen. Included in the numeration would be counts by "sex, color, illiteracy, orphanage, and occupation, if any" (House of Representatives, 1900, p. 855). Further notice was to be taken in the census of "the number of cripples, deaf-mutes, blind, etc., and of the previous attendance at school of each child" (House of Representatives, 1900, p. 855). The idea of taking a census of school aged children does not appear at this point in time in any other proposed plans of education under the Spanish of the U.S. Occupational Government. The main census of the island then being prepared was specifically designed to count the number of literate and landed adults in order to determine suffrage (Census of Cuba, 1900). The importance of this simple assessment of the number of school-aged children speaks directly to the differences between the U.S. Military and Spain regarding efficiency in the management of the schools. The earlier plans of education from Spain simply stated the schools to be placed in cities or town with populations of 500

inhabitants. No concern was given to the number of children; there was an assumption that if 500 inhabitants were in an area, there would be sufficient children to establish a school. The U.S. military, an organization obsessed with efficiency, suggested that the number of children in an area, rather than that of adults, would drive the creation of schools. This difference in perspective that was carried over from the Spanish to the Cubans added to the confusion under Military Order No. 226 in the creation of schools. While the Cubans were desirous of developing schools wherever they could, the U.S. Military was attempting to place the schools only in those areas where the need existed at a measurable level.

In order for the schools to be supported, the Board suggests that the local towns provide funding through a general taxation process. In the event that there are not sufficient funds for the purpose of erecting school buildings, they advise that bonds should be offered. Until school buildings specifically built for that purpose exist, the Board proposes that any municipal building suitable for the purpose and not used for a more important concern was to be utilized for a school building (House of Representatives, 1900).

The division of the schools into grades according to the existing Spanish system was agreeable to the Board, due to the close alignment between the existing grade divisions and those of the U.S. system. The major reason on which they based this suggestion was the grade system as it existed was well known and that teachers who have gone through the existing system would be familiar with the structure. With the concept of the grading system settled the Board listed the three essential segments of the school system. At the bottom were the schools for children younger than seven, or kindergartens (*escuelas de parvulos*). Next up the ladder was the elementary municipal school. This level was apparently for students older than seven and perhaps up to ten. Aligning this with the existing Spanish system would make this type of school

a Primary school of the Elementary Level. The final stage of education that the Board was interested in establishing was the Superior Primary school. Primary schools of the Superior Level were considered equivalent with what we would consider a junior high school today. The age range for this level of school would have been between ten and fourteen. The Board stops their proposal with the Elementary and Superior Levels of the Primary schools stating that “No steps should be taken to establish high schools (*institutos*) until the primary schools are in good working order” (House of Representatives, 1900, p. 856).

The section on the government and administration of the schools was perhaps the longest of any of the thirteen articles set down by the Board, again speaking to the issue of military efficiency. In this rather lengthy section they called for a two tiered system of school governance. At the local level the existing school councils were to be retained and given much more latitude on the school operation with a good deal of additional responsibility regarding oversight and statistical reporting. Some of the duties of the local council were to count the children in the district as soon as was possible in order to use that information for the creation of schools. These counts were to be taken yearly and would be used to inform the local and provincial council on the requirements for additional schools and the budgets to manage these schoolhouses. The selection of teachers was a new duty that the local councils did not have under the Spanish system. While a local school council could nominate a teacher to the governor in Havana to be placed in their town’s school, it was entirely up to the governor to determine if that person would be the teacher for that locale. The town council in choosing teachers, according to the Board’s proposal, was to use a competitive examination process, except in the instance when a temporary teacher was needed to fill a position. Here the Board only states that the position may be filled without competition with “the council taking adequate means to *satisfy*

itself of the capacity of the appointee in each such case” (my emphasis) (House of Representatives, 1900, p. 856). I emphasize this portion of the statement to underline the difference between what had existed under the Spanish plan of education, and what the U.S. impromptu Board was suggesting. Since this concept would be the norm in the U.S., it is not unusual to see local control emphasized in the Board’s suggested plan of education. Nor does their view of local control stop with the selection of teachers as I will show below.

Unfortunately, for the Cuban members of these local councils, the process of how to make these firsthand decisions regarding education was entirely foreign to them based on their experience using the Spanish Plans of Education for almost 60 years.

In a supportive role to the local council of education, the Board recommended that a provincial council be formed along the same lines as the local councils to coordinate the information collected at the local level. The responsibilities of the provincial councils were more of the structural kind. Issues such as reconciliation of local budgets with the planned expenditures for each town led their list of duties. Other responsibilities were determining the duration of the school year and the hours schools were to be opened daily; identifying the minimum qualifications of teachers including the process of licensure; to select the textbooks that were to be used in the schools; and finally to appoint a superintendent and enumerate all of the data received from the local councils in order to make it available to the island’s governor (House of Representatives, 1900).

The courses of instruction suggested by the Board made a major departure from what had existed under the Spanish. Students in Kindergarten were to be instructed in the letters of “the alphabet and reading in words of one syllable, printing and writing, singing, easy recitations, calisthenics and marching, beginning of English” (House of Representatives, 1900, p. 857).

Elementary primary schools for children between seven and ten years of age were to take the following courses, “reading, writing, and spelling; elementary arithmetic, with the legal system of weights, measures, and money; elementary geography, English, physical exercises” (House of Representatives, 1900, p. 857). At the Superior primary level the students were to receive instruction in Spanish grammar and composition, English grammar and composition, arithmetic (higher), elementary algebra, geography (descriptive and physical), history, drawing (linear)” (House of Representatives, 1900, p. 857).

The impromptu Board of Education of Santiago de Cuba presented their plan for the schools of Cuba to Major-General Leonard Wood on the 4th of January 1900. After a few weeks of review, Wood forwarded the plan to Governor-General John Brooke on January 25th, 1899 (Brooke, 1900). There is no record in Brooke’s correspondence indicating his receiving or reviewing the plan that I have been able to locate. What is known is that Brooke did not act on the issue of education for almost an entire year following his appointment before hiring Alexis Frye, on November 2nd, 1899, to become the Superintendent of Schools in Cuba (Brooke, 1900).

During the first months of 1899, Brooke was issuing orders intended to feed the population and improve the general health of the population, a process that was still underway in June of that year. In addition to the distribution of rations to the hungry, Brooke’s orders, from General-Order No.1 through General-Order No. 41 issued April 14th, 1899, focused primarily on maintaining order, improving sanitation, and reinvigorating the collection of taxes (Brooke, 1900). His Secretary of Justice and Public Instruction, José Lanuza, during this time, was more interested in restructuring the justice system than rebuilding schools. Of the forty one General-Orders issued out of the Governor-General’s office in Havana during those first four months, only eight originated with the Secretary of Public Instruction. Three of those eight were related

to the schools or teachers; however, not one of the three had anything to do with restarting education (Brooke, 1900).

Monté's Plan of Education

During these early months of 1898-99, before the official occupation and the short period following official transfer, a few interested educators began working to reopen the schools on the island. One of these men was José Monté of Santo Domingo a small town in Mantanzas province, who drafted a handwritten, three-part plan of education, for the village's schools that was forwarded to the provincial governor Brigadier-General Wilson. Dated February 22, 1899, Monté's short plan of education began with a brief history of the island's education system. Following the history section the author listed several favorite textbooks for the schools by subject and author. In the third part, Monté succinctly offered suggestions for coursework, daily plans of courses, and the pay of teachers (Monté, 1899).

Beginning with his first suggested course, Religion and Morals, Monté offered two texts that were found, according to him, in classrooms across the island. The first was a textbook by Don Julián Catalano titled *Religion Moral y Historia Sagrada*. The second textbook had the title *Instrucción Moral y Religioso* by Don José Manuel Royo that, according to Monté, had a plain style easily understood by children (Monté, 1899). Textbooks for grammar, arithmetic, reading, geography and writing are also noted in this letter. However, what contains the greatest importance for this study is the pages that follow the brief outline of textbooks, Monté's suggested plan of education. While only one page in length, this plan of education for the province of Mantanzas gives a very accurate picture of what courses were being taught in Cuban schools at the time of transition. Since little had been accomplished along the lines of introducing a new system of schools, or to reinvigorate the old system, this draft by Monté shows

what was most likely being taught in the few schools still in operation in February of 1899. The first section of the Plan of Education is titled “*Asignaturas obligatorias para las escuelas municipales articulo 2*” (Obligatory studies for the municipal schools Article 2) (Monté, 1899, p.

3). Immediately below the title followed a list of courses:

“*Doctrina christiana*” (Christian doctrine)

“*Historia Sagrada*” (Sacred History)

“*Lectura*” (Reading)

“*Escritura*” (Writing)

“*Principios de Gramatica espanola con ejercicios de Otografia*” (Principles of Spanish Grammar with exercises in Spelling) (Monté, 1899, p. 3)

In addition to the basic record was a secondary list that included the arithmetic necessary for business, weights, and monetary transactions. The second section stated the hours of operation and the courses that would be taught during those times. Morning classes were to begin at seven a.m. with the first lesson a review of the previous day’s work and lasting until nine a.m. Classes were also to be held between nine a.m. and ten a.m. focused on dictation of spelling and grammar for the older students with the younger students practicing their reading. Afternoon classes began after a two hour break for lunch at twelve noon. The first afternoon class from noon through one p.m. was to be split into two parts with the older students working on writing and the younger on arithmetic. From one p.m. until two p.m. the classwork was switched between the older and younger students with the older students working on arithmetic and the younger on writing. The final classwork of the day was held between two p.m. and three p.m. In this last hour of the day grammar was taught to the oldest students with those in the middle and the youngest receiving reading instruction (Monté, 1899).

Section three on page three discussed the expected salary and additional remuneration for the Director of the municipal school in Santo Domingo. The payment was to be divided into three parts: salary, materials bought for the school, housing and housing expenses. The Director's salary was expected to be 800 pesos, the materials brought another 200 pesos, and the housing allowance accorded the Director a final 500 pesos. All told the Director of the school in Santo Domingo was to receive 1500 pesos for his instruction. The final section of the plan of education discussed the attendance of students with 40 expected to be punctual in their attendance, a second group of 40 attending half of the time, and the remaining 30 coming to the school very little. The total attendance from this outline was expected to be 110, however fewer than 60 would be in class on any day (Monté, 1899). One aspect of note is the lack of management structure in Monté's plan. While he has delineated an extensive process of coursework and regulations concerning attendance and teacher pay, the structure of school management is obviously missing from his program.

Monté's short plan of education gives an excellent time capsule look into what was being taught in a small town in the middle of Cuba during the final days of the 19th century. While this plan of education does not speak to all of the education practices of Cuba during this time period, it does add verification to the information written by Packard (1899) during the same year. One unique piece of information that arises out of Monté's plan of education is the daily schedule. Few other works that I have located contain a detailed daily plan of lessons, with the exception of Auguls (1899) letter to Captain Small that will be discussed below. An additional aspect that is worth mentioning is the first two courses that are listed relating to the teaching of religious doctrine and sacred history. These basic courses appear continuously in the Spanish plans of education from the 19th century. Courses on religion and history of religion were often the

underpinning of an effort to instruct a group of people to follow a certain moral behavior. In the case of this instruction, the children of the island of Cuba were being instructed in the perceived needs of a citizen of Spain. Essentially, the use of Christian doctrine and Sacred History presented an intensive indoctrination of church and citizenship in one instructional process.

Just three days following the drafting of Montés plan, on February 25th, 1899, Captain Samuel Small (1851-1931) delivered a recommendation to Major-General John C. Bates (1842-1919), U.S.V. (United States Volunteers) the commanding officer of the Department of Santa Clara in Mantanzas province, for a new plan of education for the province. Small, who was an ordained Methodist minister and an ardent prohibitionist, occupied the position of the Superintendent of Schools for the Department of Mantanzas and reported to Bates. The suggestions in his report approached the existing education system in Cuba from a distinctly different origin than did the Board from Santiago or that of José Monté. Both of these earlier plans advocated for the use of the existing system with some modernizing. Small instead suggested a complete overhaul as a means of modernizing the school and crafting the birth of a nation (Small, 1899a).

Provincial Superintendent of Schools Samuel Small of Mantanzas

In Small's report there existed a definite undertone focused on the development of citizenship and nationality. However, not just any type of nationality, but one built on the designs of the U.S. system. Two quotes used in his introduction stand out as supportive of my perspective of Small's intent. The first "the school-room is the nursery of the nation" ties together education and nationality, while the second "Intelligence and Virtue are the pillars of Jachin and Boaz in the Temple of Liberty" is a reference to the rebuilding of Solomon's Temple (Small, 1899a, p.1). It appears that the intent of the use of this quote was to elicit the biblical

reference to the creation of Israel as a fixed nation rather than a nomadic people. The tone that Captain Small may have tried to create in his report was one of construction of the people of Cuba into a nation; however, a nation under the model of which cultural system was, for the moment at least, in doubt.

If these quotes are examined without the foreknowledge that Captain Small was not interested in seeing Cuba as a free and sovereign nation, it would appear that he believed that education was necessary for the building of a strong Cuban national identity. However, once his report is read past the first paragraph, a more accurate perspective of Small's view of the Cuban people emerges. The Reverend suggests that the people of Cuba were not as advanced as those of the more northern climes stating that the "general condition of intelligence and practical achievement of the youth of the Island forbid that the system, for the present, should be beyond the elementary principle of a practical vernacular instruction" (Small, 1899a, p. 1-2). Moving on to section IV of Small's report, he recommends that the school age extend from six years of age to fourteen. The determination of this age was based on his stated belief that the "native race is not of the robust type of more Northern zones" however since they physically develop into men and women at a faster pace than those in the U.S., "there should be a different scale of school ages than in the regions referred to" (Small, 1899a, p. 2). The slightly veiled reference to a more vigorous people living to the north of Cuba speaks directly to Small's (1899a) apparent belief in the superiority of the U.S. people and their system of education.

Small did not want to simply restart the existing system of education that existed under the Spanish, instead he sought to develop "an entirely new system, cast upon lines of approved experience and built upon modern models" (Small, 1899a, p. 1). To this end he stated that the "sole object held in view in these recommendations is to constitute a system that will lead to a

general enlargement of intelligent citizenship in these communities” (Small, 1899a, p. 3). As a suggestion to the underpinning of the system of education Small (1899a) listed four key elements that should be included to develop the citizenship of the children in Cuba.

1st. The ability to read with facility and understanding the language of the country, to the end that men may have original sources of information and acquire the habits of independent judgment in all matters.

2nd. The ability to write, so that the citizen may freely communicate with, independent of third parties, and thus enjoy that liberty of opinion and expression which defeats espionage and anticipates usurpation of popular rights.

3rd. The ability to calculate in commercial affairs of labor, trade and Finance for one’s self and thus be defended from the tricks of the dishonest.

4th. A knowledge of the History, Geography, Topography, products and processes of industry and economy of the native land and its related countries of the world at large.

(Small, 1899a, p. 3)

These four subject areas listed above are familiar to most scholars as the basis of education under the Ancient Greeks, and have been carried through the centuries by many cultures as the basic requirements of citizenship. Scholars of early 20th century education will recognize the perspective of Dewey (1902) regarding the development of the citizen through schools in the structure of these areas of study as well. Dewey (1902) asserted that in the construction of subject areas of study for a society, the school was the perfect incubator of cultural transmission. Small (1899a) appears to have a similar sentiment and asserted that by basing the education system on the island on these four basic principles the people of Cuba would have a solid foundation of liberty and freedom. However, Captain Small appears to be basing his perspective

of Liberty and Freedom on the model that he was familiar with, that of the U.S. Again, as was apparent in the Board of Santiago plan of education, Small (1899a) was viewing education as a means and method of adapting the cultural habits of the people of Cuba to that of the culture he was familiar with, that of the U.S., for a specific purpose.

That purpose becomes a little clearer in a letter written from Captain Small on February 21st, 1899. In this missive, Small alluded to the fact that he was working to develop the people of Cuba into future U.S. citizens, in a letter where he elicited the assistance of A. B. Andrews, the Superintendent of Public Instruction in Chicago, Illinois. Attempting to prompt help on the reorganization of the Cuban schools Small states that he knew that Mr. Andrews was very much “interested in the subject of education for our own countrymen” and then added “as well as those who are likely to become such” (Small, 1899d). The perspective that Cuba’s destiny to become a territory of the U.S. was already plotted was one that Captain Small apparently embraced.

My perspective is further strengthened by Small’s (1899a) suggestion for the creation of school districts in the town of Santa Clara. In earlier plans of education under the Spanish, the town council was the determining body for placement of schools. Schools during this early period were determined by population of a town. The schools were to be placed in areas that were convenient for the students to access. Even in instances when an incomplete school (a school that did not teach the entire required curriculum) was formed between different towns, the location was suggested to be within easy access by all students. Small’s (1899a) arbitrary decision regarding the division of the city of Cienfuegos into four districts without concern for the prior structure speaks to two issues. The first is his disregard for the culture, history, and the then present needs of the Cuban people as is evident above; the second was his intrinsic belief in the benefits of a U.S. system to replace that of the existing Spanish methods. Despite his

profession as a Methodist minister, Small (1899a) developed his plan for the education of the children of Cienfuegos with less interest in the individuals, and more towards the efficiency of the numbers. The arbitrary parceling of the city into four districts developed with dividing lines by geographic area was followed by a simple numerical division of the students based upon assumptions of population and common perceptions of the number of children per family. Further, he recommended the reduction in the number of schools serving the city from thirteen to eight with “one school for boys and one school for girls in each of the four districts of the city” (Small, 1899a. p. 4). In this last recommendation he assumed that the number of children attending school would be equal between boys and girls, ignoring the cultural habits of the people of Cuba regarding who was sent to school, and who might live in any part of the city. What is key in the discussion regarding Small’s (1899a) recommendations in this area is the lack of reference to the origin of his assumptions.

Small (1899a) continued his plan with the creation of a Superintendent to oversee the schools of the city, again, a very U.S. centered perspective, ignoring the town council method that existed under the Spanish. By locating all of the authority over the school district within one individual, Small (1899a) ignored the existing community structure and in effect placed the Superintendent in direct competition with the city’s *Alcalde* or Mayor and the *Ayuntamiento* or Town Council, who were the traditional groups in charge of the city’s education system. In prior plans of education for the island of Cuba, the Spanish Governor was the ultimate authority over the schools. Often assisted by the local authorities in minor matters and in financial support, the Governor made many of the decisions regarding the opening of schools, selection of teachers, payment of salaries, and the selection of textbooks for use in the classrooms. Under Small’s

(1899a) plan, all of these earlier cultural structures were rejected and a new order was developed to replace them, a central authority figure at the local level.

In review, Captain Small (1899a) developed his plan of education based upon the total redaction of the earlier method of instruction and school plan that was in existence under the Spanish. He apparently sought to install a new process developed in accordance with existing methods of management of the schools prevalent in the U.S. at that time. His lack of interest in any of the cultural habits of the inhabitants of the city of Cienfuegos is evident in the total disregard of the existing structure, in his assertions regarding the abilities of the Cuban children, and the Cuban people in general. But perhaps the most telling regarding Captain Small's (1899a) view on the structure of the school, and in his desired direction for education on the island, is in his final recommendation regarding the teachers of the eight schools in the city. Small (1899a) recommended that "at least one of them in each School be able to teach English" (p. 5).

There is some indication that Small's (1899a) plan of education was put, at least partially, in place by early spring of 1899. The best indication of this is an order issued on April 6th, 1899 by the Command of Major-General Bates that assigned teachers to the newly formed schools in Cienfuegos. Under section XIII of Small's plan, there were to be two teachers in each school. One would be designated the "Principal" who would teach the upper grades, and the "assistant principal" who would teach the "two lower classes" (Small, 1899a. p.4). According to Special Order No. 84 dated April 6th, 1899, located in File No. 50 from the Department of Santa Clara office of Public Instruction and signed by Major Louis V. Caziarc, Assistant Adjunct General, four districts were created with two schools in each in the town of Cienfuegos. One of these schools was for boys and one for girls in each of the four districts. In addition, the positions

listed for the teachers indicated one “Principal” and one “Assistant” for each school in the city (Small, 1899b). All of the provisions located within Special Order No. 84 are present in Captain Small’s series of recommendations for the teachers of the island’s schools. From this one piece of evidence it would be difficult to ascertain if the entirety of Captain Small’s plan of education was put into effect in the province of Mantanzas, however, at least in the city of Cienfuegos, the number of schools, division of schools between boys and girls, and the assignment of teachers fit his suggested plan.

Brooke’s request for information

On April 25th, of 1899, a report directed in response to a request from Governor-General Brooke was delivered through the Office of Public Instruction in the Department of Santa Clara. This report is significant as it was intended to inform the Governor-General of the condition of the schools in the province in response to a request from his office in Havana. Drafted by the “Office of Inspector of Public Instruction” and noted as File No. 97, this report appears to have been drafted by Captain Small, although there exists no signatory on the copy I located in the National Archives in Washington, D.C. The five sections of the report presented information on the condition of the facilities, buildings, method of teaching, attendance, and the suggestion of a new system of education for the island. Two of these sections, the third and the last, require a brief review as they speak again to the perspective of Captain Small to the inferior nature of the schools and teaching methods on the island. Regarding the method of teaching, Small (1899b) suggested that the “entire system root and branch, needs reorganization” and he compared the then current system to the methods used in the field schools of the south and west in vogue 50 years past (p. 3). Recitation and rote instruction were the norms of instruction according to the Captain who stated that in his observation:

... very little original instruction is given by the teachers in the school rooms, very little study made of the individual talents and aptitudes of the pupils and very little effort expended to stimulate personal ambition for an aggressive and expert education. (Small, 1899b, p. 3)

He further argued that the level of public intelligence had not advanced under the existing system despite the high cost of instruction. In the final section, Article V, Small (1899b) continued his quest to recommend that a new system of instruction based on the “latest and wisest methods” be instituted on the island. In an attempt to broaden the support of his suggestions, Small (1899b) also asserted that the existing systems had not impressed “any expert who has observed its organization and operations” since they were not in step with the modern methods of instruction (p. 3).

One final item of importance that was located in this group of documents was a letter from the teacher of a school for boys in Placetás, a city in Mantanzas province east of Santa Clara. The teacher a *Señor* Manuel Auguls sent this letter to the Office of Public Instruction in Santa Clara to outline his daily and weekly schedule of classes. Mondays, Wednesdays, and Fridays in the morning hours the following courses were presented: from seven am to eight am students were instructed to study. Eight to nine in the morning encompassed reading, with the hour from nine until ten am spent on grammar and agriculture. Students were off from ten am through noon when they returned for the afternoon classes. Noon to one pm saw a return to reading followed by an hour of writing and a final hour of geography. Tuesdays and Thursdays also began the morning with study from seven through eight am with reading assigned for the next hour. Drawing was practiced from nine through ten, with students again departing until the noon hour. Afternoon classes on these two days consisted of reading for the first hour, writing

from one pm until two, with arithmetic covering the final hour. At this school, the teacher also required the students to attend class on Saturdays where he held the same hours for the start of classes as other days of the week. Saturday morning classes began with study as well, with reading and drawing filling the remainder of the morning. Saturday afternoon classes began at noon with dictation followed by arithmetic and afternoon conferences for those students who needed extra assistance (Auguls, 1899).

These early plans of instruction from Mantanzas province and Santiago de Cuba give an insightful look into the courses of study being utilized during the beginnings of the U.S. occupation. Plans of education from both Cuban scholars and U.S. Army officers had been proposed and in one case that can be ascertained with some degree of certainty, were implemented. The interplay between the old and the new during this time period, when there was much ambiguity over what would be taught and who would make the decisions regarding the system of education, is evident in the differing perspectives on the courses of study in the schools. One thing that both sides had agreed upon at this early stage was the need of starting up the stalled system of education on the island.

Despite the collection of information by Brooke regarding the condition of the schools as was outlined in Captain Small's report of April 25, 1899, Secretary Lanuza did not appear to be working on a specific plan of education for the primary and secondary schools of the island. If he was, one was not released in the immediate months following this request for information. Lanuza's preoccupation with the legal restructuring process at the beginning of his term, while understandable, left much to do in a short period of time before the beginning of the new school year. Regardless of the pressure to craft a plan of education, the first of September arrived without a plan in place or on the horizon. Luckily for Governor-General Brooke, Alexis Everett

Frye (1859-1936) a graduate of Harvard would shortly send a letter to the Secretary of War Elihu Root that appeared to solve this problem. In his brief missive dated September 18, 1899, Frye made a plea to “tender my services in any capacity, without pay and without limit of time, in the army of the Philippines” (Frye, 1904, p. 39). Following shortly behind Frye’s letter came one from then President of Harvard, Charles Eliot, suggesting to Root that Cuba and education would better suit the eager volunteer (Frye, 1904, p. 39). Frye had requested assistance from Eliot in order to approach Root, however, the older educator wanting to assure that his younger graduate was not in a position of peril, made sure to add in his suggestion of sending Frye to Cuba. Aware of the struggle on the island to institute a school system, Root forwarded both Frye’s and Eliot’s letters to Governor-General Brooke for his consideration.

Apparently concerned that the school year began without a plan of education in place, Brooke had previously started a search for an educator to fill the spot of Superintendent of Schools for Cuba. Shortly after receiving Root’s cable, Brooke answered the Secretary that he desired to place Mr. Frye as the head of the reorganization process of the schools in Cuba. On November 2nd, 1899, under Military Order No. 210, a new position was created in the Department of Justice and Public Instruction. The position was designated the Superintendent of Schools of Cuba with Alexis Everett Frye named as the first officeholder of the new position (Brooke, 1900).

On November 4th, 1899 an extensive reorganization of the University of Havana is unveiled in Military Order No. 212. Often linked to Frye, this very extensive and complete work is more than likely the work of Lanuza and his staff. The structure of, and extensive lists of required coursework, are indicative of a longer and more thorough study than would have been possible in two short days available to Alexis Frye. In addition the insight into the structure of

the University and colleges of study, indicate that someone familiar with the University was directly involved with the creation of the plan. José Varona, who became the Secretary of Public Instruction on May 1st, 1900, was not very fond of the work done in the creation of Military Order No. 212. He derided the regulation as one that did little to reform the problem in the University than to add more professorships and department chairs (Wood, 1901a).

Military Order No. 226

Finally, after almost a year of occupation, on December 6, 1899, Military Order No. 226 established the first plan of education for the entire island of Cuba (Brooke, 1899). This comprehensive plan for the schools of the island is typically attributed entirely to the effort of Alexis Frye; however, from the scope of the problem and the depth of the detail provided in the plan, it should be assumed that he received some assistance from the existing department of Justice and Public Instruction staff. Military Order No. 226 was the first of three major directives issued by the U.S. Military Occupational Governors intended to restructure what was taught in the schools of Cuba and by what particular methods. Established in its 36 sections were the creation of a central board of education, the structure of the public school system, attendance rules, requirements for teachers, school building and classroom necessities, terms and sessions of schools, subjects of study, and the superintendence of the schools including general expenditures allowed (Brooke, 1899).

This first attempt to structure an island-wide school system approached the issue from a distinctly different direction than did the plans of education under the Spanish. While the Spanish plans began with a bottom up structure of the primary schools followed by the coursework required to be presented and very little if any management structure, Frye's plan began with a top down administrative focus. Articles two through six were dedicated to the

structure and powers vested in the board of education located in each municipality (Brooke, 1900). Article seven, although it seemed to be focused on development of the schools in a rapid manner, was relatively loosely worded regarding the expenditure of money. This one provision created a firestorm of controversy once the addition of new school rooms grew out of control. In his haste to get the schools up and running as quickly as was possible, Frye included a provision that allotted fifty dollars for school furniture for each new school room that was created on the island (Brooke, 1900). In the text of the Article, Frye's intent was apparent, the authorization of local boards of education to begin the process of hiring teachers, outfitting schools with chairs and desks, and to provide supplies for use in the schools. Not counted on, in this loosely worded document, was in their rush to capture the offered money, the local school boards would create classrooms without any prospective students. The text of Article seven is presented below in order to showcase the loose wording of the regulation:

VII. Boards of Education shall make all necessary arrangements for opening the elementary (primary and grammar) schools by December 11, 1899, or as soon thereafter as possible, and to that end will rent rooms or buildings, supply suitable equipment, and employ teachers. Each of said Boards is hereby authorized to expend a sum not exceeding fifty dollars, for furniture for each schoolroom; but no further purchase of school-furniture shall be made without the approval of the Secretary of Justice and Public Instruction. (Brooke, 1900, p. 93)

It is sufficient to say at this juncture that over 3,000 schoolrooms were opened within a scant six weeks, leading observers both inside the military and civilian contractors to question the structure and wording of this section of the school plan (Brooke, 1900).

Articles eight through thirteen established the requirements for the creation of schools. For towns with a population of 500 inhabitants, one complete school (a school that taught the complete curriculum of study), for boys and one for girls were to be opened and staffed. Classrooms were not to exceed fifty students for a single teacher; however, if it became necessary to increase occupancy beyond fifty students, an assistant teacher could be hired at the discretion of the local board of education. Local boards also had the discretion to form an incomplete school if a town or village had a population less than 500 inhabitants (Brooke, 1900). Thus far Frye's proposed structure follows the system of school creation under the majority of the Spanish plans of education from the 19th century, further reinforcing the perspective that he received assistance from Cuban educators in the development of this plan. Article eleven set the minimum number of students for a complete school at thirty five, something not present in the 19th century plans. The twelfth article gave the control over the creation of coeducational schools to the local town councils; this was also a process not commonly allowed for students who were not of color under the Spanish. Article thirteen placed the control over the courses of study squarely on the Superintendent of Schools of Cuba; however, no specific coursework was offered at this juncture of the plan (Brooke, 1900). The easing of control that existed under the Spanish was apparent in the early parts of this plan through the positioning of decisions with the local town councils; however, the selection of coursework by the authority in Havana was the same as it was in the 19th century.

Article fourteen committed the same error of assumption that existed in Captain Small's plan of education for Cienfuegos. Under this plan the locus of control over the creation of school districts had been shifted to the local board of education from a central authority, it was they who were to design the district, reassign students and teachers as necessary, and limit classroom

populations per the aforementioned maximum occupancy (Brooke, 1900). Articles fifteen and sixteen established regulations for the school buildings and prohibited occupancy by the teacher or their family as a residence. The buildings were to be located in healthful areas and “must be clean, well ventilated and well lighted” (Brooke, 1900, p. 95).

Attendance and the penalties for parents who did not follow the law of compulsory education for students between the ages of six and fourteen were outlined in Articles seventeen through twenty one. The fines for noncompliance to the education law range from five dollars for the first infraction to twenty dollars for repeated occurrences. The maximum fine was set at three hundred and twenty five pesetas (Brooke, 1900, p. 95). This equates to about \$46.41 based on .1428 pt to the U.S. dollar in 1900, a substantial sum at that time (Gilman, Peck, & Colby, 1909, p. 386). Qualifications for prospective teachers were outlined in Article twenty two with little more stated than that they hold the requisite certificate to teach prior to the first day of school. Since this law was being speedily introduced, few words were spared on the qualifications for the teachers; only one paragraph existed in the school law, that closed with the comment that more will be forthcoming regarding examinations and certification for teachers.

Articles twenty three through twenty six regulate the salaries for teachers with the admonishment that when employed in similar circumstances men and women were to be paid equally (Brooke, 1900). The salaries paid were based on a simple formula determined by geographic location and type of school. Teachers in Havana were entitled to the highest salaries by the school law of 1899; they were to receive \$75.00 U.S. for each complete month of service. The low end of the scale was in municipalities where \$50.00 U.S. was paid. If the teacher was an assistant or if the school was an incomplete school, the teacher was only entitled to \$30.00 U.S. per month. Janitors on the other hand were only paid five dollars U.S. per classroom they

were responsible to clean each month (Brooke, 1900). However, if a janitor cleaned classrooms in several schools of the town, their opportunity for a salary in excess of what was paid to teachers was possible.

Finally in Article thirty one, Frye lays out the subjects of study. This very brief paragraph lists only the subjects of study for the elementary school with nothing suggested for higher grades. The courses that are listed by Frye are as follows: “reading, languages (Spanish and English), writing, arithmetic, geography, history, hygiene, music, drawing, and nature studies” (Brooke, 1900, p. 97). Little more is said regarding the coursework other than the Superintendent of Schools of Cuba will prepare the course of study in each subject and also instruct teachers on the methods of instruction. How true this final statement was will be seen with the review in question two of Frye’s *Manual para Maestros*, a manual Frye and his two principle assistants drafted to align the teaching methods in the island’s schools to practices then underway in the schools of the U.S.

With so much on the line regarding the creation of the schools in Cuba it is shocking that so little was directed towards the courses of study in these earliest of school laws. In contrast to the plans of education under the Spanish during the 19th century, who listed the coursework down to the last detail, Frye and the U.S. government focused instead on the organizational structure of the school. The discussion of coursework was left for later, it seems what was important was simply to get the students off the streets and into a school. This short shrift of the coursework is further proof that Frye was not the author of the earlier plan of studies for the University of Havana. That plan had extensive lists of coursework and course requirements in the manner utilized in the aforementioned plans of education under the Spanish. It is likely that this plan for the University was drafted under Lanuza, although there is little to indicate this

belief in the Archives of the U.S. or Cuba that has been locatable. While Frye was commended for his rapid and detailed work that quickly opened schools on the island, the omissions in several areas become fodder for accusations brought against him later in 1900. In the final sections, Fry closes out the school law of 1899 in the manner that he began it, with additional structure provided for the Superintendent of Schools of Cuba and requirements that enumerate the expenditures of the schools at the local and provincial levels. This law for the schools was to remain in place for little more than nine months until a new one drafted by Lieutenant Matthew Hanna was put into effect.

Civil Order No. 279

The second major revision of the school law crafted under U.S. occupation was created under Civil Order 279 published on June 30, 1900, and subsequently restated in Civil Order No. 368 published by the Governor General on August 1, 1900 (Wood, 1900f). The reissuance of the school law on August 1st, 1900 was designed to adapt several unwieldy provisions of the earlier regulation. A great deal of controversy surrounded the release of this law both internal to the department of Justice and Public Instruction and amongst the people of Cuba. Released while the Commissioner of Public Education, Alexis Frye, was in Boston with a contingent of Cuban school teachers who were attending summer school at Harvard University, the order had been crafted by Lieutenant Matthew Hanna an aide of Governor-General Wood. According to Hanna, General Wood had approached him in May of 1900 to prepare a “draft of a civil order to properly organize and control the public schools of the island of Cuba” (Wood, 1900f, p. 98). This second in the series of civil orders and school laws relevant to the reform of the school system in Cuba was perhaps the most perfunctory. Labeled by Albert Gardner Robinson, in an article written for *The Independent*, as “a system of bookkeeping for the educational department

of the island of Cuba”, Hanna’s school law was focused more on the details of management and very little on the courses of study for the schools (Gardner, 1901, p. 387). However, it was in this highly structured piece of regulation that the clearest view of the officially required courses of instruction on the island of Cuba under the U.S. occupation is evident. Although not divided by grade level or age of the student, Hanna presented a list of courses that were necessary for the student to have taken at the primary and elementary levels if they desired to enter the institute (high school). In addition, Hanna also gave a complete list of the courses that were to be taken at the high school level. While the secondary school section in Civil Order No. 279 published on June 30, 1900 appears to be an integral part of the work drafted by Hanna, it is an exact copy of Civil Order No. 267 published on the same day by the Secretary of Public Instruction, José Varona. Varona personally claims authorship of this work in his annual report dated September 14, 1900 stating that he had approached Governor-General Wood on the 13th of May to propose the regulation. Although the stronger claim to authorship of this one section of the broader law appears to lie with Varona, to avoid confusion at this juncture I will cite both Hanna and Varona as authors in this section. In the section on Enrique José Varona, authorship will be analyzed further based upon additional information gleaned from research on Hanna.

The courses that are listed in Civil Order No. 279 do not follow a specific formation; however it is easy to discern the approximate level each area would have covered. Under the requirements for entry to the *segunda enseñanza* Hanna (Varona) lists the following:

First. The applicant for admission must be 14 years old, or be specially authorized to be admitted.

Second. He shall demonstrate that he has taken the primary, elementary, and superior courses of instruction

The applicant shall undergo an examination whereby he shall demonstrate:

- (a) That he speaks, reads, and writes the Spanish language correctly;
- (b) That he reads and translates English or French passably, and
- (c) That he has studied and is familiar with the following subjects:
 - 1. Practical arithmetic up to the application of ratio and proportions.
 - 2. Mechanical drawing and elements of geometry.
 - 3. Complete geography of Cuba, elements of geography of America, and rudiments of universal geography.
 - 4. Elements of the History of Cuba and the rest of America.
 - 5. Elements of physical geography.
 - 6. Elements of hygiene.
 - 7. Elements of zoology and botany. (Sanger, 1900, p. 600; Wood, 1900f, p. 574)

Since the schools of Cuba had effectively been closed since 1895 and the start of the Cuban War of Independence, few students even in the city of Havana had the luxury of attending school for the three years of conflict and two of reconstruction. Many students during this time period received the rudiments of instruction in home or private schools, if they received any at all, that were not under any supervised adherence to a specific course of study. By listing the requirements as demonstrative rather than through submission of documentation, Hanna (Varona) acknowledged the difficulty many students would have had producing a diploma from primary or secondary instruction. Also rather than requiring mastery of the subjects the regulation simply stated “the student shall demonstrate that he has taken” these subjects through “an examination”, the scope of which was left for others to determine (Sanger, 1900, p. 600; Wood, 1900f, p. 574). The general course areas listed by Hanna are supported by the lists

supplied by Liras (1895) with the exception of the religious focused courses contained therein, and should have been familiar enough to the students who were attempting to gain entry to the high schools of Cuba.

Courses of study at the institute level (high school) are more definitive in Hanna's school law. While the entry requirements appear to be fairly easy to surmount, the coursework at this higher level appears to be equivalent to high schools of the time in the U.S. The coursework listed in Civil Order No. 279 comprise of the following subjects:

Grammar and Spanish literature (historical and perceptive).

A Foreign language (English or French).

Universal geography, universal history.

Mathematics, including trigonometry.

Physics.

Chemistry.

Elements of cosmology (physical description of the world).

Introduction to biology. Natural history.

Logic and elements of psychology.

Introduction to sociology. Civic instruction.

(Sanger, 1900, p. 600; Wood, 1900f, p. 574)

All of the aforementioned subjects were to be completed within four years with some having prerequisite courses needed to be completed beforehand. Foreign languages were permitted to be taught in Spanish for the first year; however, thereafter these courses were to be instructed using the language being taught. Geography was to come before history, with algebra preceding physics and chemistry. Geometry was to be completed before cosmology, which was to precede

biology, with all the aforementioned taken in advance of sociology. Mastery of each of these courses was to be demonstrated by exam (Sanger, 1900; Wood, 1900f). The examinations that follow the course lists resembled minor curricula in their presentation. An example of this was the examination in history. Two sections comprised the demonstration of mastery of this subject, one oral, and the other written. The oral exam was to be given before a map where the student would show their general knowledge “regarding the principal historical epochs and a more circumstantial knowledge of a period of modern history, which period shall be selected by the examining board” (Sanger, 1900, p. 601; Wood, 1900f, p. 575). The written portion of the exam required the student to write a thesis on a subject of modern history. In their essay, the student was to “demonstrate a general knowledge of the political and social condition of the country during the period designated” (Sanger, 1900, p. 601; Wood, 1900f, p. 575).

The civics exam is also worthy of discussion since this subject area had not been in regular coursework prior to the U.S. occupation. As was required in the history exam the civics assessment requires an oral and written submission. During the oral aspect, the student was to show “that he possesses a general knowledge concerning the state, individual freedom, government and its functions” (Sanger, 1900, p. 603; Wood, 1900f, p. 577). Mirroring the exam for history, the writing portion was also a thesis where the student “shall apply said principles to the political organization of Cuba in any of the different periods of its history, which period to be selected by the board” (Sanger, 1900, p. 603; Wood, 1900f, p. 577). The remainders of the subjects all contained examination requirements that the prospective graduate were required to take and pass in order to receive their diploma. Under this regulation, Civil Order No. 279, the fee for the examinations was set at \$10 U.S. dollars.

Summary and preliminary discussion of Question 1

In concluding this section the courses required in the standard K-12 curriculum in Cuba are fairly easy to ascertain. Although there were several regulations put into use in the various locations around the island, the groupings were very similar and fit into either existing practices from Cuba or that of the U.S. The official regulations established in Military Order No. 226, Civil Order Nos. 279, and 368 all focus on the same subject areas. Spanish, English, history, mathematics, science in various guises, lineal drawing and geography were the predominant courses used in the primary levels. At the institute level (high school) courses in higher level languages, math up through trigonometry, geography of Cuba and the world, history, science, and civics filled out the required coursework. The extensive array of final examinations that was required before examination indicate that the subject matter was rigorous and well planned. What is less clear are the perspectives utilized in their selection.

Since the majority of the work-product for these any plans of education has apparently not been included in the material archived by either the Cuban government or the U.S. Army, only very broad assumptions regarding the selection process can be made. Here I rely upon the conjecture that has arisen from the reading of the different plans, reports, and letters that have passed between the many individuals involved in this process. While a definitive answer cannot be ascertained from this limited cache of data available I can begin with the assumption that prior experience in education practices may have assisted the actors involved in their decision making process. With this nascent perspective as my guide, I examined the regulations, school laws, suggested coursework, and letters exchanged by the nationality of those preparing the work. Even with the limited sample available, some conclusions can be made as to the process of selection.

For those of Cuban descent, there appeared to have remained an adherence to the existing structure of coursework utilized under the Spanish plans of education. The school subjects included in the suggested plans of study, authored by the Cuban teachers and professors, mirrored almost exactly that which was required under the Spanish plans of education. This is of specific importance since the Cuban intellectuals had militated against the plans of education required by the Spanish throughout much of the 19th century. One determination that can be made from this response of pushing back against the Spanish regulation and then utilizing the subjects of study once they had a choice is that the Cubans were not uncomfortable with the subject matter of the plans of education. Instead, it was the regulation that limited local control that they were more set against. This perspective would explain in part the inclusion by Monté (1898) of Christian Doctrine and Sacred History as the first two subjects in his course list for primary schools. Similar to Monté, Manuel Auguls (1899) holds over a part of the older system of education under the Spanish, requiring school on Saturdays, despite the issuance of the plan of education authored by Small (1899a) that only required classes to be held five days a week. That said neither Lanuza (Brooke, 1899) nor Varona (Wood, 1900) in their suggestions for the coursework of the schools adheres to the older style of coursework. This may be due to both men having achieved their degrees in Spanish universities and then spending considerable time in Europe and the U.S. Varona especially was aware of the failings of the Spanish system of education and had been openly critical of the results. His view of the coursework may have been colored by the lack of structure that was evident in all of the Spanish plans of education, especially those that had led to the fraud and abuse evident in the Havana institutes. The most informed perspective of the selection process for Cuban scholars appears to be that the processes the Cuban scholars were suggesting was based upon personal use and experience. One

additional aspect of note here is the concept of *Cubanidad*. As will be noted later in my conclusion, the resistance to change, of any type, appears to be an integrated component of this much discussed topic and weighed heavily upon the decision making process of the Cuban educators.

Although there are several additional sources of information available to inform me on the selection process of coursework by U.S. individuals, as was evident in the review of the Cuban scholars, little of the work-product that may have provided more definitive answers on the selection process are not available for review if they exist at all. What is known about the U.S. individuals involved in the creation of the plans of education leads to a tentative conclusion that is similar in scope to the Cuban scholars, but may have been driven by the situational aspect of the locus of power on the island. Of the four U.S. plans of education that were reviewed, the perspectives of Major-General Wood, Captain Small, and Lieutenant Hanna are the easiest to categorize.

General Wood was an ardent annexationist and made no attempt to hide this in his correspondence with everyone from then future President Theodore Roosevelt to his immediate superior Secretary of War Elihu Root. In letters to both men Wood spoke openly about the right of the U.S. to annex the island. He was also openly critical of the system of education on the island and suggested in his report of September 1st, 1899, that nothing resembling education could emerge from such a system (Wood, 1900a). It would not be a leap to suggest that Wood had steered the board he had assembled to produce specific subjects of study conducive to the transformation of the culture of Cuba in their plan of education.

Captain Small was also very critical of the Spanish system, but maybe more so of the Cuban people. His comments regarding the intelligence of the youth of the Island and their

scholastic ability spoke to something deeper than a belief in a better system of school governance. In addition to questioning their intellectual abilities, Small stated that the children of the island are of a less robust makeup than those children who live north of the island. Embedded within his report of April 25, 1899 (Small, 1899b) are innuendos that disparage not only the system of education on the island, but also questioned the virtue of the teachers in their financial transactions regarding salaries and rentals of school buildings. Small likened the Spanish system of education then in use in Cuba to “a system in name only” that “has been the least of public considerations” (Small, 1899a, p. 1). The method of teaching according to Small was one used in the old field schools of the south from 50 years past, a comparison to schools used for the children of slaves in the U.S. (Small, 1899b). Perhaps Small’s most open and negative comment regarding the school system on the island was left for the last line in his final paragraph of the report. Speaking to his earlier suggestion that the system be entirely reformed Small stated “The entire system root and branch, needs regeneration and establishment according to the latest and wisest methods that prevail in the cultured nations of the earth” (Small, 1899b, p. 5). Based on these few references to Small’s perspective on the Cuban system of education, the intelligence and ability of the Cuban student, and his questions regarding the honesty of the Cuban teachers, there is enough support for the argument that Small did not see Cuba as equivalent to that of the U.S. and sought to recreate the education system he was familiar with from the U.S. there in Cuba.

Arriving with Major-General Leonard Wood during the invasion of *Oriente* province in 1898, Lieutenant Matthew Hanna had risen from an Aide de Camp for the General in August of 1898 to become the Commissioner of Education by the summer of 1900. He is one of the few U.S. individuals, with the exception of Alexis Frye, with experience in education prior to coming

to Cuba. Robinson (1901) stated that Hanna created the school law under Civil Order No. 279 by following the form of the Ohio School Law with which he was familiar. His knowledge of the Ohio law was due to his four years of experience working in Ohio on educational matters (Robinson, 1901, p. 386). The Ohio School Law was at that time one of the older and more developed sets of regulations for the management of a school system in the U.S. Initially developed in the early part of the 19th century, by 1853, the Ohio school law was well defined and used extensively across the state (Trevitt, 1853). The school law from Ohio that Hanna followed in the creation of Civil Order No. 279 was very likely the law drafted in 1879 and install in 1880 (DeWolf, 1883). This law was modified several times in the 1880's and 1890's with the last revision prior to U.S. involvement in the War in 1897. An additional revision to the Ohio school law was published in April of 1900; however, the changes that exist in that version contain legislative adjustments primarily to the libraries, colleges and universities of the state (Bonebrake, 1900). Since the law of 1897 was the most current law from Ohio at that time, it is probable that Hanna relied on it for the structure of Civil Order No. 279. Based on a review of the existing Ohio school laws from 1883 through 1900, it appears that Hanna developed a system of education for the island through reliance on these series of regulations augmented by his observations of the failings of the existing regulation under Military Order No. 226, enacted by Alexis Frye. There is no indication in his report of a belief that the Cuban children were not up to the task of coursework established by this regulation, quite the contrary. To all intents and purposes it appears that Hanna acted to improve the system he was confronted with using the tools that he was familiar with.

After reading several of Alexis Frye's reports and uncovering much about his actions while he was in Cuba has led me to categorize him as a passionate and driven individual. His

passion is evident in his desire to enter the service of his country and in his embrace of the Cuban culture. He entwined himself in the values of Cuba to the extent of marrying a Cuban school teacher from Cárdenas he met while traveling with the Cuban teachers on the U.S.S. Sedgwick to Boston in the summer of 1900 (Boston Evening Transcript, 1901). His drive was evident to almost everyone he came in contact with, and many who just knew of his work like Robinson (1901) who said that Frye was “a man of large ideas and unlimited enthusiasm” (p. 385). It was his propensity to attempt big things which eventually led to his downfall in Cuba.

The evident haste in which the school law issued under Military Order No. 226 was written is evident in the loose language and lack of structural controls. However, Frye was the first person working on the school plan problem who was successful. While it is easy to find fault with the construction of the plan, it is difficult to cast Frye in the light of someone who was working to impose his opinion on others. Much of what Frye accomplished in Cuba during the short fourteen months he was on the island can be attributed to his desire to assist the Cuban people in their quest to build a sovereign nation without U.S. interference. So fervent was his passion for the people of Cuba that as a wedding present to the people of the island he had 100,000 copies of the Cuban national anthem (*La Bayamesa*) printed and distributed throughout the island (Wood, 1900d). In the end, the selection process that Frye used for his plan of education for Cuba was one of expediency. His desire to be helpful and to provide as much as he could as fast as was possible put him at odds with the very structured military way of management. The contradiction in styles between Frye and Wood will be discussed further in the next section on the influential actors of the school and curricula creation in Cuba.

Question 2:

Who were the influential actors involved in creating the schools and curricula in Cuba after the Cuban War for Independence?

Of the several different methods in which this question can be answered one very effective manner is a process where each individual's work is discussed in relation to the others with who they interacted and the events that precipitated between them. The main focus of each treatment below is a presentation of the influential actor's work on the development of the school system of Cuba. Through a review of their developed work such as school laws, Military and Civilian Orders, and the events they were involved in, the importance of these actors regarding the development of the islands schools becomes evident. This method eases the difficulty often experienced with historical reviews and allows for direct comparison in the manner outlined in my methods section. In addition, in order to gain insight into the ideological perspectives of the individual actors, events, letters, and official reports are utilized to indicate a direction of thought regarding annexation and independence of the island. Biographical information is kept to a minimum in order to concentrate the focus of the data on the actor's actions regarding the school system.

While there are several hundred individuals who were involved in the reshaping process of the Cuban school system under the U.S. occupation, I have winnowed out from my research six influential actors involved in creating the schools and curricula in Cuba, following the Cuban War for Independence, who had the most substantial impact. Each of the main individuals in these three groups had direct involvement with the creation or management of a school plan for the island. Since the school plans were the impetus for the majority of change to the school systems, focus on their individual actions in relation to the school plans will give greater insight

into what changes were attempted and some of the personal perspectives of those involved in the adaptation of these important laws.

These individuals can be placed into one of three groups; The Military Governors of the island, the senior school officials under the U.S. occupation, and civilian employees of the U.S. occupation force. The first group is the smallest with General John R. Brooke and General Leonard Wood as the only two members. Each approached their responsibilities from slightly different political perspectives. Brooke was a military man first and as such followed the regulations he was commanded to obey to the letter. His views on annexation were not as well formed as Wood's; however, he did support the eventual inclusion of Cuba into the U.S. Wood, on the other hand, approached his responsibility in Cuba from the view that the U.S. system was far superior to that being utilized in Cuba. A staunch annexationist, Wood constantly referred in his correspondence and official reports to the not so distant future when Cuba would belong to the U.S. Based on this overarching perspective, Wood sought his own course, often failing to allow the U.S. Army, and members of his command, to catch up to his ideological position.

The collection of individuals who populate the second grouping have much in common, but are as diverse in their approaches and temperaments as a group of intellectuals can be. As the top school officials they held jobs such as the Secretary of Justice and Public Instruction, Superintendent of Schools of Cuba, Commissioner of Schools of Cuba, and Provincial Superintendent of Schools. The men in these top positions were the faces of an unseen army of assistants and lower-level officials and are often credited with the work accomplished in large part by their staffs. During the almost three and a half years of the U.S. occupation the people who held these positions worked, sometimes diligently and at others with somewhat less focus, to install a new system of schools on the island of Cuba.

Most scholarship on this series of demanding jobs focuses on two men once again, Alexis Everett Frye, and José Varona. The focus on this pair ignores the work of several other individuals and the contributions of provincial superintendents across the island. Many men of less notoriety such as Captain McKenna, José Antonio Gonzales Lanuza, Captain Samuel Small, José Monté, and Lieutenant Matthew Hanna played many very important roles in the development of the island's schools. Many of the unsung heroes of the restructuring of the island's schools have largely gone unnoticed by most scholars for the last century. Despite some short lived notoriety for their efforts in Cuba, these men and women worked to create the pieces of the system that their leaders desired, and were more often than not credited for.

My third cluster briefly explores the individuals employed as contractors for the American occupational government including Lincoln de Zayas and Esteban Borrero Echeverría who worked as assistants for Alexis Frye, Maria Luisa Dolz who in association with José Varona crafted the Plan Varona that was put in place following the U.S. transfer of power to the Cuban people in 1902, and Wilson Gill the developer of the Gill School City that was established as the primary method of teaching American-styled civics to the children of Cuba. The final group also includes some of the legislators and government officials in Cuba and the U.S. who worked to either defend Cuban independence or bend the Cuban people to the will of the U.S. While these individuals do not figure in the main discussion regarding influencing the education system on the island directly, their influence is felt in an indirect manner and they are treated as such in this analysis. Their involvement was either through the work on the development of a plan of education, assisting other officials in the drafting of a manual or regulations, or through the development and installation of a new method of teaching civics education to thousands of children.

During the remainder of this section, I address the six main individuals as they are associated with the others they were working with and through the regulations they produced. Rather than leap between similar titled figures in an attempt at comparison, I present my information regarding each actor based on their entry into the series of events. Following a somewhat chronological path in order to showcase the changes made to the schools during the occupation, I begin with a review of Major-General John Brooke.

Major-General John R. Brooke: Military Governor-General 1898-1899

Major-General Brooke's tenure as Occupational Governor began December 28th of 1898 when he assumed the position as the first Military Governor General, from the U.S., of Cuba (Brooke, 1900). Faced with an island that had little governance since the Spanish had capitulated the previous August, Brooke worked quickly to reestablish a semblance of order in Cuba. Encountering a chaotic situation of one army retreating and a second advancing to fill the abandoned positions across the country, neither of which was under his command, the General targeted the areas where he did have influence, the civil aspects of government.

The Governor-General had received his orders to take command of the island fifteen days earlier under the authority of General Order number 184, and had issued this, his first General Order for the island on December 28th, 1898:

In accordance with the order of the President, as published in General Orders, No. 184, dated Headquarters of the Army, Adjunct-Generals Office, Washington, December 13, 1898, the undersigned hereby assumes command of the Division of Cuba, and by the requirements of the same order will exercise the authority of military governor of the island of Cuba. (Brooke, 1900, p. 5)

(General Order 184 can be read in its entirety in the *House of Representatives, 56th Congress, 1st Session, Document No. 2 of the Congressional Serial Set* associated with the Annual Report of the War Department for the fiscal year ended June 30, 1898, p. 5).

Before officially taking over command of the island from the Spanish, Brooke indirectly published his first controversial order. Fearing that the transition from Spanish to U.S. control could provide an opportunity for acts of retribution from the Cuban army, Brooke prevented any celebrations by the victorious force declaring “that the danger to life and property was too great, and that the celebration must be postponed to a time when the excitement had cooled off and the passions of the people could be controlled” (Brooke, 1900, p. 7). The ceremony of transfer took place with only a small contingent of Cuban generals present; Brooke and his staff began their tenure on the island by denying the Cuban army their rightful moment of triumph.

Later that afternoon, once the ceremony had ended, Governor-General Brooke published his first official address to the people of Cuba. This short announcement amounted to little more than an acknowledgement that the United States Government was in control of the island and was in the process of securing the persons and property of the Cuban people. Brooke further stated in this announcement that the current laws of the island were to remain in force for the time being, the Cuban people should treat each other without regard for “previous affiliations” and that he was open to meeting with those people who “may desire to consult him on matters of public interest” (Brooke, 1900, p. 7). Brooke began his proclamation with the following short statements:

Coming among you as the representative of the President, in furtherance and continuation of the humane purpose with which my country interfered to put an end to the distressing condition in this island, I deem it proper to say that the object of the present Government

is to give protection to the people, security to person and property, to restore confidence, to encourage the people to resume the pursuits of peace, to build up waste plantations, to resume commercial traffic and to afford full protection in the exercise of all civil and religious rights.

To this end, the protection of the United States Government will be directed, and every possible provision made to carry out these objects through the channels of civil administration, although under military control, in the interest and for the benefit of all the people of Cuba, and those possessed of rights and property in the island. (Brooke, 1900, p. 7)

In this last line Brooke is alluding to the thousands of foreign nationals who then resided on the island, mainly Spanish citizens who had yet to choose a permanent association with Cuba or Spain. In addition, there were several thousand Cubans who had been born on the island and who had taken U.S. citizenship as a method of protecting their assets from the Spanish during the insurrection. The status for these Cubans in limbo was referenced later in a discussion between then Governor-General Leonard Wood and the Secretary of War, Elihu Root on suffrage.

This is in regard to the status of a large number of Cubans who are American citizens, among whom are many of the most important and influential men in the island, and many are at present holding high positions under the present government. They became citizens of the United States to protect themselves and properties under the Spanish regime; some of them are now civil governors etc. They are all natives of the island and I should think entitled to vote. (Wood, 1900h)

From the very beginning of Brooke's term and throughout the ensuing fourteen months, the struggle with simple concepts, such as who was to be recognized as being Cuban, slowed the process of civil reorganization.

Without a recognized government of the people of Cuba, the Governor-General needed to institute a provisional, and temporary, civil government. In addition to the challenge associated with everyday governmental functions, General Brooke was well aware of the cost associated with the occupation and the total lack of revenue for that purpose from the island's resources. In order to assure that funds were available to support the provisional civil government in Cuba, taxes and tariffs had to be collected. With the legal system of the island in complete disarray, a transition needed between the old Spanish system and the incoming U.S. process of jurisprudence, Brooke was faced with an enormous task. Reforming the schools of the island did not rank very high on his list.

Schools across Cuba had virtually ceased to exist at the end of the Cuban War of Independence, and when they did, were seldom of the type with which the Military Governor and his staff were familiar. Classes were held in residential buildings totally unsuited for the process of education, supplies were nonexistent, classroom furniture was of the crudest type, totally inadequate for practical learning, and many of the teachers had not been paid in many months (Brooke, 1900b). When Brooke finally turned his attention to reforming the island's schools he recognized that a large expenditure of U.S. funds was necessary to properly complete the job.

In addition to the problems listed above, the infrastructure of the island had been destroyed during the conflict. Railroad track had been damaged along with bridges and roads. Crops had been burned and the lifeblood of the island, sugar production, had dropped to very low

levels of manufacture due to the number of ruined processing facilities. Faced with what seemed an insurmountable task, Brooke quickly attacked the problem with military efficiency and process.

One of his first orders was to rearrange the divisions of government that had existed under the Spanish. He did this by issuing Military Order No. 3 on January 11, 1899 establishing four departments to manage the civil affairs of his command down from the six divisions utilized by the Spanish. On the following day, January 12, 1899, under Military Order No. 4, Brooke assigned four influential Cuban men to be the Secretaries of the newly created departments. It is possible that these men were selected after consultations with the civilian leaders of the city of Havana that Brooke says he is open to speak with in his proclamation. However, there does not exist in Brooke's reports or letters any correspondence relating to why he chose these men for the positions.

It is possible that a process similar to the one used by Brigadier-General William Ludlow that is presented in his report dated August 1, 1899 was employed in the selection of Brooke's civilian staff. Ludlow, who was assigned to Havana, Cuba on December 17th, 1898, assuming command on the 21st of that same month, planned ahead by requesting lists of possible civil officials in Havana from influential Cubans living in the Washington, D.C. and New York areas (Brooke, 1900a). The results according to Ludlow was lists of "names for the several positions to be filled, composed of citizens of the highest standing and personal character and commanding the fullest respect and consideration of the community" (Brooke, 1900a, p. 231). What is clear from a quick analysis of their credentials is that each man was a leader in his field, and all were recent residents of Havana. Table 1 below outlines the department, the secretary, and a brief background of each man.

Table 1 First Civil Departments of Cuba under Governor-General John Brooke, January, 1899.

| Department | Secretary | Background |
|---|------------------------------|--|
| State and Government | Domingo Mendez Capote | 1863-1934 General and Vice President of the Republic of Cuba under Arms. President of the Constitutional Assembly of Cuba 1901 (Jiménez de la Cal, 2005) |
| Finance | Pablo Desvernine | 1854-1935 Scholar, teacher, and attorney in Havana. Law degree from Columbia University in the US. Professor of Civil Law at the University of Havana 1901 (Parker, 1919). |
| Justice and Public Instruction | José Antonio González Lanuza | 1865-1917 One of the original conspirators of the 1895 revolution. Professor of civil rights in the faculty of rights at the University of Havana. One of the thirty founding members of the Academia de la Historia de Cuba (EcuRed.). |
| Agriculture, Industries, commerce, and public works | Adolfo Sáenz Yáñez | Member of the Autonomist party in Cuba before the War (Peréz, 2007). |

(Brooke, 1900, p. 8)

Once he had established his civilian cabinet, Brooke began with the most pressing problem first, hunger. Following the end of the Cuban War of Independence, many of the people of the island had little left to subsist on. Food was scarce, and what food there was, commanded a high price. During the war, both sides followed a program of destroying crops, livestock, and infrastructure. So severe was the food shortage, for the first six months following the cessation of hostilities, military rations were distributed across the island. According to Brooke (1900a) in his Civil Report dated October 1, 1899, a total of 6,493,500 rations were distributed during the first few months of the occupation (pp. 8-9). Rations were to consist of the following foodstuffs included in Table 2 below, based upon General Orders No. 110 of the War Department; Adjunct General's Office dated August 1, 1898 (Brooke, 1900a). Medicine was also distributed to the sick "with most beneficial results" (p. 9).

Table 2 Emergency rations distributed by the U.S. Army in 1898-1899

| Each ration contained: | | |
|--|--|-------------------------|
| Rations distributed by the U.S. Volunteer Army during the initial months of the Cuban Occupation | 8 ounces bacon. | Daily ration per person |
| | 12 ounces flour, or 16 ounces corn meal. | |
| | 6 pounds coffee (green), | Per 100 Rations |
| | 6 pounds coffee (green), | |
| | 10 pounds sugar, | |
| | 2 quarts vinegar, | |
| | 4 pounds salt, | |
| | 4 ounces pepper, | |
| | 4 pounds soap. | |

(Brooke, 1900a, p. 22)

In order to further illuminate the existing conditions that existed on the island at the beginning of the occupation, I rely on an excerpt from Brooke's 1899 Annual report. In this report the Governor-General (1900a) cites a letter from an unnamed Cuban General who Brooke had requested to survey the four western provinces. According to the General the condition of the island was horrible.

A state of desolation, starvation, and anarchy prevailed almost everywhere. In Santa Clara, with the exception of the municipal district of Cienfuegos, agriculture and trade had practically disappeared. For this reason, and on account of the number of *Reconcentrados*, mendicants, and criminals, the most complete political, economic, and social chaos prevailed. The country roads, mail service, public instruction, and local governments were in a state of almost complete abandonment. Mantanzas province was in a worse condition, the city of Mantanzas having been the worst sufferer among the cities. The province of Habana presented a similar aspect; and in Pinar del Rio, the war had caused its greatest havoc, about 30 per cent of the population having disappeared.

(Brooke, 1900, p. 9)

In order to present the above report in context, it is important to briefly outline some of the conditions witnessed by U.S. sources prior to the onset of the occupation.

The effect of the *Reconcentrado* on the people of Cuba was devastating. The condition of the island's infrastructure following the cessation of hostilities, including roads, bridges, water and sewer systems, sanitation services, customs offices, hospitals, courts, police, and schools, were almost nonexistent and where they did exist, were in need of major repair and restructuring. In the cities of the island alone were there any schools worthy of being called a school as everything in the four western provinces of Cuba had succumbed to the torch of the *Reconcentrado* (concentration) effort. The process of total destruction by both sides in the conflict led to major losses of documents as well. Favorite targets of the insurrectionists were government buildings, including the tax assessor's office where many of the legal documents for property were held. When these facilities were destroyed, proof of ownership documents for land and buildings went up in smoke with the structures. In an effort to counterattack against the acts of the insurrection, the Spanish forces and guerrillas (loyalist Spanish civilians) began to burn homes and businesses in the remaining four provinces under their control (Pérez, 1983).

As an integral component of the process of waging war against the Cuban insurrectionists, General Valeriano Wyler (1838-1930), who had been named Governor of Cuba in 1896, began a process of dividing the population in the countryside from the Cuban forces. Known as *Plan de Reconcentrado*, as it was reported in U.S. and Cuban newspapers of the time, was a process of the forcible removal from their homes in the countryside of over 400,000 Cuban citizens (Barton, 1899). While numbers vary greatly in the scholarship regarding this brutal event, from a low of 170,000, to well over 600,000, most scholars agree that over 250,000 Cubans died during the *Reconcentrado*.

The method of re-concentration of the peasants from the countryside into the cities was brutal, and earned General Weyler the nickname of “The Butcher” from many of the journalists covering Cuba for the U.S. press. Under the *Reconcentrado*, the peasants from the countryside were forced into camps surrounded by *trochas* or trenches. The conditions inside these camps were horrific. Near the end of May, 1897, word began to spread concerning the concentration effort on the civilian population by Weyler. Soon this travesty began to be covered by the United States press corps. Early reports from the New Haven Evening Register (May 27th, 1897) and the Baltimore Sun (Bennett, May 28th, 1897) recount inspections of the *Recocentrado* camps by William J. Calhoun, special agent in Cuba appointed by President McKinley, and an American physician, both of whom cite reprehensible and unsanitary conditions in the camps. As recounted in the New Haven Evening Register, Calhoun “found 4,000 starving *Reconcentrados*, and was told that 3,000 more had just been driven into the overcrowded small towns of the district” (May 28th, 1897).

The quality of living inside several of the camps was also observed by Vermont Senator Redfield Proctor (1831-1908) on a fact-finding trip to the island less than one month following the sinking of the Maine in Havana harbor. Upon his return to the U.S., Senator Proctor spoke before Congress on March 17th, 1898. Clara Barton included a complete copy of the Senator’s speech in her book on the Red Cross published in 1899. In his address to the Senate, Proctor had few kind words for the Spanish; however, his firsthand account of the circumstances in which the Cuban *Reconcentrados* were living was very compelling. According to Proctor, the condition inside the trenched cities was difficult to escape from once the *Reconcentrados* were marched inside the barbed wire.

Every town and village is surrounded by a *trocha* (trench) a sort of rifle pit, but constructed on a plan new to me, the dirt being thrown up on the inside and a barbed-wire fence on the outer side of the trench.

These *trochas* have at every corner, and at frequent intervals along the sides, what are there called forts, but which are really small block houses, many of them like a large sentry box, loop-holed for musketry, and with a guard of from two to ten soldiers in each.

The purpose of these *trochas* is to keep the *Reconcentrados* in as well as to keep the insurgents out. (Barton, 1899, p. 534)

The view Proctor gives of the *Reconcentrado* camps, to the other Senators present, was one that showed the “desolation and distress, misery and starvation” that the *Reconcentrados* endured, some for over three years (Barton, 1899, p. 534).

Having dealt with the immediate and pressing need of avoiding the starvation of additional members of the island’s population, Brooke next turned to the complete overhaul of the system of government, the legal system, and the repair of the infrastructure of Cuba. So pressing was the need across the island associated with these issues that a restructuring of the school system was not addressed in any substantial manner for approximately four months. Brooke addresses this lack of attention in his Annual report dated October 1, 1899.

The absolute necessity for immediate action in connection with questions arising in the branch of justice of this department, and the urgency thereof being greater than that demanded in the branch of public instruction, and as reforms in this bureau could not be introduced so as to be applied before the following scholastic year, many matters relating to it were postponed. (Brooke, 1900a, p. 19)

Eventually recognizing that the schools of the island needed to be reopened, on March 10th, 1899, Brooke ordered a report from all six provinces regarding the existing condition of the schools (Small, 1899b). The four areas of concern for the Governor-General were school room facilities, buildings, the existing method of teaching, and attendance (Small, 1899b). Over the course of the next several months results began to trickle in from the various divisions. Despite being drafted by different individuals in positions as diverse as Adjunct General to Chaplin, all pointed in one direction, a total reorganization of the schools was necessary.

José Antonio González Lanuza: Secretary of the Department of Justice and Public Instruction 1899

During the period from January 31st, 1899 until December 31st of that same year, José Antonio González Lanuza (1865-1917) was the Secretary of the Department of Justice and Public Instruction. He had been placed in this position On January 12th, 1899 by Governor-General John R. Brooke under military order. During the first months of Lanuza's time in office he was preoccupied by his own admission with the requirements of reestablishing a working legal system and contributed little time to the cause of improving the island's schools (Brooke, 1900).

In order to accomplish the task of school reorganization, Brooke instructed Lanuza to begin crafting a new school law for the elementary and primary schools as the middle of the year approached. Although there is some discussion regarding an education plan for the island authored by Lanuza in October of 1899 (Brooke alludes to this in his annual report drafted October 1, 1899), most notably by Fitchen (1970) and Angulo (2012), a copy of the plan was not found in the National Archives or *La Biblioteca Centro de Información para la Educación (CIED)* in Havana, Cuba. Further investigation determined that Lanuza's plan of education is

not contained as an addendum to any of the annual reports produced by Governor-General Brooke, Superintendent of Schools Alexis Frye, or in Lanuza's own report from October 1899.

According to Angulo (2012), Lanuza sent a completed school plan to Brooke, "Brooke yawned. He shelved the law and moved on to other matters" (p. 5). The Governor-General likely took no action on Lanuza's plan since he had recently (September 22, 1899) decided to hire Alexis Frye and bring him to Cuba to work on the reorganization of the schools. Fitchen (1970) gives an analysis of the Lanuza plan of education in his Doctoral dissertation stating that the curriculum was changed from including Spanish history to Cuban history and additional courses in agriculture were to be made available. Other areas that Lanuza recommended for change was to allow local decisions on the selection of teachers and textbooks, long points of contention between the Cubans and the Spanish Captains General (Fitchen, 1970). Despite the over 25 pages in Lanuza's annual report dated September 16, 1899, only two short lines are directed to the reorganization of the schools in Cuba. He states a very obvious point but gives absolutely no detail regarding what needs to be done in the schools. "In public instruction, of course, the task is vast and its programme cannot be summed up in a few lines. Everything has to be done if we except the matter of university teaching, and it will take special attention" (Brooke, 1900, p. 271).

After over two months of attention to the legal system of the island, Lanuza issued his first order relating to the schools of the island. On March 29, 1899, Military Order No. 31 eliminated the dues students had been paying to secure a printed degree that indicated their achievement (Brooke, 1900). Following this change, Lanuza closed all of the Normal Schools for the remainder of the scholastic year (Brooke, 1900). While his intent was to allow for the restructuring of the Normal Schools to match the yet unfinished School Plan, the abrupt closing

left many potential teachers with unsettled futures. These schools stayed closed for most of the time the U.S. was in control of the island, opening finally during the summer only in 1900 and 1901. In almost rapid fire, compared to his earlier attention to the schools, Lanuza then produced Military Order No. 39 on April 13, 1899 that placed the secondary schools of the island under direct control of the Governor-General (Brooke, 1900). It was not surprising that the island's teachers saw this action as a return to the familiar methods of the Spanish Captains General. However, in defense of Lanuza, this occurred simply because he had earlier abolished the provincial deputations as part of the reorganization of the legal system. These deputations in the provinces had been the locus of control over the secondary schools; however, this seemingly arbitrary action led many Cuban newspapers to question whether the old days of Spanish rule were returning (Brooke, 1900).

The Secretary of Justice and Public Instruction, on the same day as he had repositioned the control over the secondary schools, terminated the existing pension system for Cuban school teachers. This was accomplished under Military Order No. 40, also dated April 13, 1899 (Brooke, 1900). Coming on the heels of the aforementioned reorganization, this law set teachers firmly against the reform process that was slowly leaking out of the Division of Justice and Public Instruction. A major blow to one of the supports historically granted to teachers was initiated on June 20, 1899 by Military Order No. 82 abolishing the benefit of *Jubilación* (Brooke, 1900). The severity of the new regulation is apparent in the text of the second provision stated below:

All persons holding positions as teachers of any grade in the public schools who may be absent from their duties by "Jubilación" shall be discharged immediately, and from this date such "Jubilación" is hereby abolished. The substitutes who are discharging the

duties of such positions shall be considered as filling them ad interim, and shall receive the entire salary which legally pertains thereto. (Brooke, 1900, p. 53)

The destruction of an existing and accepted practice without prior notice led many teachers, especially those who had long worked under this process, to decry the action as an attempt to destroy the culture of teaching on the island.

Not containing his restructuring of the school regulations on the island to the primary and secondary schools, Lanuza next began to make changes to the University system. In Military Order No. 90, dated June 23, 1899, Lanuza annulled Article 121 of the existing Spanish plan of education currently in-force on the island, the School Plan of 1880 (Brooke, 1900). The new regulation required any graduate of a foreign institution to present their certifications to the division of Public Instruction, where they would be analyzed by members of the faculty of the University of Havana (Brooke, 1900). This redirection of a law that had historically prevented Cubans from transporting their degrees off-island, now placed the faculty of the University in the position of determining if any foreign earned degree or license (read Spanish) met the requirements of Cuban authorities. Lanuza stated in his report to General Brooke that the purpose behind this law was to give opportunity to the thousands of U.S. citizens currently living on the island (Brooke, 1900).

Lanuza was an interesting choice to head the department of Justice and Public Instruction as all of his experience was in criminal law at the university level. While this may have suited him well for the job of reconstructing the legal system of the island, he was not very well prepared to rebuild the failed primary and secondary school system. A brief review of Lanuza's life in the years immediately preceding the U.S. occupation appear in an article written by George Reno (1899) for *The American Monthly Review of Reviews*. According to Reno (1899)

in his commentary highlighting young Cuban leaders following the revolution, Lanuza was perfectly suited for the job because he was recognized in Cuba as an excellent jurist, had recently been elected to the Supreme Court of Cuba, and “his prominent social rank will render him a welcome factor in the administration of the city’s affairs” (p. 321). Lanuza is also credited by Reno (1899) as being an “ardent advocate of independence” and as having served as chief of the judicial corps in the provisional government of Cuba in New York following his release from prison for insurrectionist activities in Havana. Although Lanuza appears aptly suited for the legal aspect of his job, little of his previous experience appears to have prepared him to create a plan of education for the island’s schools.

Governor-General Brooke had also hampered Lanuza’s opportunity to institute any substantial change to the public education system with his extensive financial reforms. Under the Spanish, the Department of Public Instruction was an entity entirely separate from that of the Justice Department. Due to Brooke’s second Military Order on January 11, 1899, these two different departments were merged in an effort to consolidate finances. Austere economic measures instituted by Brooke and the rapidly collapsing legal system were the underlying reasons for the scarcity of effort Lanuza put towards the education process for the first five months of 1899.

Once the public school system appeared on Lanuza’s radar, the aforementioned plan of education for the primary and secondary schools was begun. At the same time as he was apparently working on the plan of education for the municipal schools, the staff of the Department of Public Instruction was creating the restructured colleges and courses of study for the University of Havana. Since Lanuza had not crafted a plan for the primary and secondary schools during the early part of 1899, and as Brooke was in no rush to institute changes to the

existing education system, it is not a surprise that no substantial reform was accomplished under his tenure. Unimpressed by Lanuza's plan of education for the island, Brooke received an unexpected opportunity in the guise of Alexis Everett Frye, a Harvard Graduate and a public school teacher in the U.S.

Alexis Frye: Superintendent of Schools 1899-1900

Alexis Frye is often cited as the first Superintendent of Schools for Cuba following the Cuban War of Independence. This is accurate if you ignore the earlier work of Lanuza as the Secretary of Justice and Public Instruction and his staff, and the independent work accomplished in the provinces by men such as Captain Small and the members of the Santiago Board. While Lanuza was technically the Secretary of Justice and Public Instruction, and Frye was placed in a newly created position, both men were directly responsible for the creation of the new school law for Cuba. Where Lanuza focused the majority of his work on rebuilding the legal structure and afforded little time to the creation of a new school system, Frye was focused entirely and very intently on the reconstruction of Cuba's schools. His intense interest in the job is evident in the many things he was able to accomplish during his fourteen month tenure, but it was his passion for Cuba and the people of the island that led him into contention with Governor-General Leonard Wood and the Secretary of War Elihu Root in late 1900. Despite ending up in Cuba, Frye was not originally interested in going to work in the Island's schools. His first intent was to join the United States Volunteer Army and fight the Spanish in the Philippines (Frye, 1904). However, fate, and important political connections intervened into Frye's life aspirations.

With the onset of agitation for a war with Spain many well-to-do college-aged men used their political connections to join the U.S. Volunteer Army, most notably in Theodore Roosevelt's Rough Riders. Urged on by his father, Senator William P. Frye (1830-1911) of

Maine to enlist with Roosevelt, the younger Frye was one of many young men-of-means who was not selected by the future President. Disappointed but not deterred, Alexis Frye used his father's political connections to get a letter to Secretary of War Elihu Root offering his services to join the U.S. Army in the Philippines. In his September 18, 1899 letter Frye offered to "tender his services in any capacity, without pay, and without limit of time, in the army of the Philippines" (Frye, 1904, p. 39). Perhaps portending in what capacity he would end up rendering service to the U.S. he ends his letter to Root with this closing line: "I tender these services in active military work till our flag floats in peace over the islands, and then to the Philippine natives, whose loyalty to our flag can best be won through the schoolroom" (Frye, 1904, p.39).

Following shortly behind Frye's plea to Root was a letter of recommendation from the President of Harvard, Charles Eliot. A graduate of Harvard University, Frye obtained his Bachelor's degree in Law in 1890 and his Master's in 1897 (Harvard University, 1897-1898). Best known at this time as the author of several well written textbooks on Geography for high schools, at the time of his appointment to Superintendent of Schools in Cuba he was the Superintendent of Schools in San Bernardino California (Goodwin, 1900, December 16). While supportive of Frye's attempt to offer his services to the military, Eliot suggested to Root that Frye's skills would be better put to use in Cuba, perhaps in an academic setting (Frye, 1904). On September 22, 1899, Secretary Root forwarded Frye's and Eliot's letters to Governor-General Brooke in Cuba asking the General to "keep him especially in mind if appointments in an educational capacity are contemplated by you for the school work in Cuba" (Frye, 1904, p. 40). According to Frye, Brooke cabled back that he would like to have Mr. Frye sent to Cuba.

Under pressure to get the schools back in operation, Brooke quickly hired Frye on November 2nd, 1899 under Military Order No. 210 (Brooke, 1899, p. 38). The brief directive

first created a new office in the department of Justice and Public Instruction with the title of Superintendent of Schools of Cuba and then appointed Alexis Everett Frye in the newly created position (House of Representatives, 1900, p. 439). The position that Frye occupied was not outlined further in the military decree. Nor was there additional information regarding his duties until the publishing of the new school law under Military Order No. 226. So ambiguous was the reporting chain for Frye's new position that José Varona complained in his annual report for the Secretary of Public Instruction, that even his office was unaware of how many schools had been created by Frye's actions (Wood, 1901a).

Arriving in Cuba in late October, Frye took charge of his new office on the same day it was created. During the next eight months, he was a whirlwind of activity. A listing of the accomplishments of Frye's office during the time between his appointment under Governor-General Brooke, and June 30, 1900, are presented in his response to Secretary Root's testimony in the Wood hearings. According to Frye, his office's major activities included: the new school law for Cuba (see above); the publishing of his book *Manual para Maestros*; the development of a course of studies for the schools; opening of schools for over 143,000 children; the employment of 3,350 teachers; the rental of 2,000 buildings for schools; supplying the newly created schools with textbooks; the shipping of over 3,500 tons of supplies to the schools; planned out summer normal schools for over 5,000 teachers and students; and that he personally accompanied 1,273 Cuban teachers to Harvard for study and travel during the summer of 1900 (Frye, 1904).

Of the thirteen items that Frye listed as accomplishments there are three that merit further discussion due to the insight they provide to Frye's perspective on Cuba, his transition from progressive annexationist to supportive of the Cuban cause of independence, and his work in

reforming the education system. The first is the school law that was published under Military Order No. 226 on December 6, 1899 that has been discussed above. The second is his book for the teachers of Cuba on teaching methods, *Manual para Maestros*, and the third and perhaps most informative is the trip for over 1,000 of Cuba's school teachers to attend Harvard during the summer of 1900.

Rather than revisit the school law in its entirety, I will instead focus on one article in the series of regulations that created much confusion and a great deal of contention between Frye and the successor to Brooke, Brigadier-General Leonard Wood. The new school law had been published on December 6, 1899, with the intent of getting the schools back in operation by December 11, 1899, a very ambitious undertaking (Brooke, 1900, p. 460). This order came in the final days of Brooke's tenure as the Governor-General of Cuba. Brooke was soon to be replaced by General Wood on December 20th, 1899 (Brooke, 1899). The main point of contention came in Article VII, where an allocation of \$50.00 for new classroom furniture for each schoolroom was included. This provision had been added in order to ensure that the new schools would be adequately prepared with proper desks and chairs for the incoming students. Furniture for the schools was nonexistent in most regions with students either sitting on their own chairs brought from home or on the floor (Hanna, 1902a). Taking into account the reports on the existing school's conditions from Wood (Brooke, 1900), Captain Small (1900), Hanna (1902a) and others, the expenditure seems practical and necessary to refurnish the classrooms.

Unfortunately, and despite Frye's best intent, what occurred in practice was a wholesale rush to create schools across the island, many in places where no school had existed before. Complicating the matter was a major change that occurred under the release of Military Order No. 226 regarding the management of schools. Essentially, this order placed all authority for the

management of the island's schools under the control of the office of the Superintendent of Public Schools, who in concert with the local mayors determined all aspects of the school management processes. The redirection of management over the municipal schools from the Department of Public Instruction to the Superintendent of Public Schools and the local mayors changed who was in control of the funding for the new classrooms. The *alcaldes* or mayors became the sole authority on the selection of the new school board members, placing them in a powerful and unique position. In an attempt to provide for their citizens, schools and supplies that were the equal or better than those of neighboring town, and lacking any contrary regulation in the school law, the local boards began establishing schools at a record pace. Having recently undertaken an itemized accounting of expenditures under order from the Secretary of War on February 9th, 1900, Wood became concerned at the lax recordkeeping he observed in the Department of Justice and Public Instruction (Wood, 1900e). Alarmed by the sudden push to open schools, reports of schools being opened without students, and the influx of bills for the purpose outlined under Article VII of the school law, Governor-General Leonard Wood reacted swiftly and shut down the process under the following order:

Havana, March 3rd, 1900.

The Civil Governor,

Province of Havana, etc.

Sir: By direction of the Military Governor the following is communicated to you: No new schools will be organized after the date of this letter, March 3rd, until further orders. You will immediately cause to be investigated by the mayors of the various municipalities all schools already reported established and satisfy yourself that the schools are duly organized, reporting same without delay.

Very respectfully,

Adna R. Chaffee

Brigadier-General, Chief of Staff (Frye, 1904, p. 11)

Frye was livid that his new school law was being modified by Wood and responded quickly, asking the General to rescind his order since it had thrown many of the cities and towns into a chaotic situation regarding the creation of additional schools and the completion of schools already started. Wood held his ground and refused to lift the sanction on new schools.

The main focus of the office of the Superintendent of Schools, for several months, had been opening schools and his concern here was that the schools would continue to be opened. Wood on the other hand was apprehensive that some sort of fraud was being enacted in the rapid creation of schools due to the lax recordkeeping that Frye utilized. To the end of discovering what, if any, fraud existed in the creation of the schools under Article VII, Wood authorized officers of each province to visit and investigate whether or not schools and classrooms did exist, and if they did, whether or not they were populated by students. While General Wood did not come right out and accuse Frye of fraud, he did cast doubt on his ability to manage complicated processes. In a letter to Elihu Root Governor-General Wood stated that while he believed that while Mr. Frye was “an excellent man for purely detailed work [he] has very little executive ability and most of the work here of practical executive character has to be done by officers of the Army – in fact nearly all of it” (Wood, 1900b, p. 1).

The underlying cause of the friction between these two men had three main components. First, they were both strong-willed individuals who believe that they were correct in their perspective concerning every situation. Wood exemplified this in his battles with his superior officer Brooke, especially concerning the lack of action on the schools of the island. When he

was not making headway with Brooke on this issue, he pursued the option of having Brooke reassigned and replaced by him. For Frye this trait emerges during the contention he had with Wood over the new school law and teacher pay. Dissatisfied with Wood's response to his complaints, Frye sought out Elihu Root during the Cuban teacher's stop in Washington, D.C. to attempt to convince the Secretary of War that Wood was acting erratically. Second, they emerge from different philosophical worlds. Frye is an academic; while attention to detail was important to him, it was not the most important aspect of achieving an end result. This comes through in the school law that was written in a little more than a month with no clearly established course of study and regulations that often created more confusion than they solved (Brooke, 1900a). In his rush to publish the school law, Frye glossed over many parts of the regulations a few that according to Matthew Hanna caused serious issues with the management and financial aspects of the schools (Wood, 1901a). Wood, on the other hand, was dyed-in-the-wool military, very detail oriented and very much focused on process more than progress. He was results driven, but results that had every "i" dotted and every "t" crossed. Wood's view of Frye was born out in several letters written between him and Elihu Root and Theodore Roosevelt. Some are official in nature, for example when Wood was responding to the teacher pay crises, others are of a personal slant, with Wood complaining openly to the Secretary of War and the future President of Frye's actions. A letter that sums up their relationship was one sent by Wood to Elihu Root on January 8, 1901 informing the Secretary of Frye's resignation.

Speaking of Frye he stated:

He is a singular combination of impulsiveness and duplicity and, while as a matter of sympathy, I am sorry that he should go with his feelings hurt, yet he was a dangerous man in the Island and his influence on the teachers and the children was in the direction

of the most intense radicalism as to the future relations between Cuba and the United States, in support of which I refer you to the literal translation of a letter of his which I sent you some time ago. (Wood, 1901a, p.1)

The letter that Wood referenced here was a long and rambling missive to the people of Cuba, on the advent of Frye's marriage to a young Cuban school teacher. The distrust between Wood and Frye that these events created was never put to rest and emerged several years later when the Governor-General was up for promotion from Brigadier to Major-General. Although Frye resigned on January 8th, 1901, the effect of his discord with Wood remained in the soured relationship between the Governor-General and the island's teachers who supported Frye even after he had left the island.

During Frye's tenure in Cuba he authored of a manual for teachers written almost entirely in Spanish. This book is also the introduction of the first course of studies for the island under U.S. control. Apparently assisted in this effort by two of the Secretaries of the Board of Education, Esteban Borrero Echeverría, M.D. and Lincoln de Zayas, A.M, M.D., Frye drafted a text that introduced teaching methods used in the U.S. to Cuban teachers. Echeverría and de Zayas appear to have aided Frye with some of the cultural concepts of the Cuban people and with translations of some of the existing school regulations under the Spanish. Titled *Manual para Maestros*, Frye opens his book with a message directed to the teachers of Cuba: "*Es mi primer mensaje, y el tema de nuestro labor será siempre: Libertad absoluta á todo maestro, para que emplee su propio método de enseñanza*" (Frye, 1900a, p. 3). (This is my primary message, and the theme of our work is always: Absolute freedom to all teachers, so you may use your own method of teaching.) The concept of absolute freedom in teaching methods would have been a very foreign idea for the Cuban teachers. For decades during the nineteenth century they had

been required to follow a series of very structured school plans put in place by the Spanish and under the watchful gaze of the Catholic Church. While many of the teachers in Cuba were aware of the teaching methods that had been in use in the U.S. and Europe for decades, such as those espoused by Pestalozzi and Froebel, they were typically required to use the processes developed by Lancaster from the very beginning of the 19th century to teach their classrooms. Lancaster's method, also known as the Monitorial Method, allowed a teacher to manage a classroom of over 100 students through the use of student monitors. Due to the constant lack of funding from Spain, this method existed in almost every Spanish Plan of Education in Cuba from 1842 (1844) onward. Combined, Frye's book and his new school law were very liberating and empowering to a sector of the island's workforce that had little choice or individual control in years past.

In the fifteen chapters that comprise his manual for teachers, Frye gave suggestions on how to teach each subject. For some, he gave minor advice. In spelling, for example, he states that teachers do not need a specific book to teach spelling; instead, they should collect the new words used in reading, history, geography, and language for use in spelling practice (Frye, 1900a). In other words, spelling is contextualized in the courses of study. For other subjects, such as history, Frye gives extensive practical suggestions. In addition, he laid out a comprehensive curriculum under this section that all but eliminated the inclusion of any history beyond that of Cuba. Frye began his history course for the Cuban schools with the "discovery" of the island by the Spanish, traversed through the time of the natives, the sixteenth, seventeenth, and eighteenth centuries; encouraging teachers to address specific points of interest he had listed. Special attention was given to the nineteenth century and the attempts at independence by the Cuban people. Two separate sections discussed the Ten Years War and the Cuban War of Independence, with additional sections focused on the martyrs and heroes of both conflicts (Frye,

1900a). After two sections on the attempt at annexation by the U.S. and commercial relations with U.S. companies, Frye closed his suggestions for teaching history with a section devoted to the development of the public schools on the island (Frye, 1900a). A second major chapter was the section on the teaching of English in the Cuban schools. Frye devoted most of this chapter to the reasons why Cuban children should learn the English language rather than the methods of instruction. Other chapters in the teacher's manual included physical exercise; reading; grammar; English phrases; writing; arithmetic; geography and the study of nature; hygiene; music; and drawing (Frye, 1900a). Concluding his book, Frye also included the complete text of the school law of December 6, 1899, for reference, in both English and Spanish (Frye, 1900a).

Frye's manual for teachers was very popular amongst the *maestros* of the island. Not only was it easy to read and straightforward in its approach, but the focus was directed almost entirely towards the student. This was virtually unheard of on the island where repetition and rote learning had held sway for the previous 80 years (Packard, 1899; Small, 1900). Much more so than any previous official plan of education under the Spanish or the U.S., Frye's manual was a how-to for teachers. While the plans of education under the Spanish were structured with little room for individual style, Frye's instruction manual almost required teacher experimentation. Not only did his work outline the processes that could be used, but he also included approximate times to be assigned to a specific task based on the age of the student (Frye, 1900a). The reader could easily see that these suggestions were as Frye stated "*como fruto de mi experiencia personal*" (as a fruit of my personal experience.) (Frye, 1900a, p.3). This statement at the very beginning of his book allowed for many of the island's teachers to accept his suggestions with little malice. An unusual occurrence considering the resistance to change typically exhibited in Cuba to suggestions from outside sources.

With a dearth of Normal Schools on the island, Frye's manual became the direction many of the new teachers needed in order to effectively manage their classrooms. The first three chapters of the manual was essentially a classroom management primer that included processes to use to ensure that attendance was properly tabulated, suggesting using capital and lowercase letters to indicate present, absent, and tardy; the process for determining the percent of daily and monthly attendance was also explained (Frye, 1900a). A second section discussed modern concepts of education such as interspersing exercise and music during the day as methods of offsetting tiredness that naturally occurs in young students. In the writing module, Frye included illustrations to show proper seating of a student to ensure clear and effective handwriting (Frye, 1900a). For a first or second year teacher, this manual was an excellent source for learning new methods and tried processes for managing their classrooms. For more experienced teachers, Frye's manual was a reference book for use with the new school law. In effect for both new and experienced teachers, the manual became a new source for information on teaching, management, and an exposure to U.S. and European teaching methods.

One of the first sections of Frye's manual was targeted to exercise that could be done in the classroom or on the courtyard of the school. Seventeen physical exercises that range from simple to complex are described in detail including hand and foot position along with voice commands for the teacher (Frye, 1900a). The remainder of his book was a methods class on proper ways of presenting content in the various disciplines. One comment Frye made early on in the book that underlined his perspective towards the student was "*Infiltremos en la vida de cada niño la mayor suma posible de felicidad*" (Let us insert the greatest possible amount of happiness in the life of each child) (Frye, 1900a, p. 5).

Not surprisingly, since Frye's specialty was in teaching and authoring books on geography, his section on this subject was the longest and most comprehensive segment of the manual. In this section the teaching of geography is divided over six years, beginning at age ten, and started with an introduction to natural history. Plants, soil, water, the climate and the objects of the universe were all treated with care in the geography section. Several themes run through the six year program: the examination of the different colors of nature, a review of the plants and animals that live in the area around the schools, and an investigation of the different "races" that exist around the world. In each year, the topics were to be taught at higher levels. For the first three years, Frye recommended that teachers do not use a book, but instead, the teacher should use words to describe the area around the school and the plants and animals that live there. It was not until the fourth year of geography studies that Frye recommended that a textbook be put into use in the classroom. In a footnote section Frye stated that at the time of the printing of his manual, the only book that had been approved for use in the geography classes of Cuban schools was a book written by him titled "*Geografía Elemental por Frye*" (Frye, 1900a, p. 125). This was the recommended book, stated Frye, because it was the only one written in Castilian Spanish that could be obtained for the Cuban schools. His recommendation was that the book be used until such time as Cuban teachers develop one that was specifically designed for Cuban schools.

One additional aspect of the section on geography and natural history is the ongoing thread associated with "race" and regions of the world. Examined from today's perspective, it would be easy to cast aspersions on Frye's views on the different people of the world. However, it is important to recognize that at this time in the academic development of the concept of culture, "race" was an emergent topic, still under intense debate and discussion. Despite Frye's seemingly unflattering descriptions of many of the different people populating the varied regions

of the world, he did attempt to introduce children in Cuba to the concepts of diversity and culture. Where Frye came up short in this area was his view of belonging to a superior “race” and his efforts to assist a group he initially saw as inferior to the people of the U.S. While Frye eventually reconstructed his perspective on cultural status, this early work gives clarity to his personal views held when he first arrived on the island.

Frye’s most ambitious undertaking during his time on the island, and perhaps for what he was best known afterwards, was the development of the Cuban teachers to Harvard College excursion for teacher training in the summer of 1900. The immense complexity and grandeur of the undertaking was quintessential Frye. Despite the seeming impossibility of gaining approval for and then completing the excursion, Frye worked diligently to overcome most of the obstacles that were encountered along the way. Looking back at this project from today, the complexity is daunting; at that time it must have seemed almost impossible considering the conveyance and communication methods then available. However, despite many snags as he progressed from idea to reality, Frye was able to manage a successful summer program for 1273 Cuban teachers at Harvard (Frye, 1904).

The idea for this professional development was hatched between Frye and Ernest Lee Conant (1857-?) also a Harvard alum, and a practicing attorney in Havana. While Frye is often given credit for the idea of the plan, the *Cambridge Chronicle* of February 24, 1900 attributes the idea to Conant (Cambridge Chronicle, February 24, 1900). According to the article, Conant went to Havana as soon as possible following the cessation of hostilities and came up with the plan over a year before he discussed it with Frye. Governor-General Leonard Wood adds to these two men, Mr. Cameron Forbes of Boston, indicating in his report of January 1, 1901, that Forbes and Conant came up with the plan and were assisted by Frye (Wood, 1901a). When the

men came together in early 1900, the plan that had been under consideration by Conant and Forbes came to fruition under Frye's dogged determination.

Following a meeting in early February, the men drafted a letter to Charles Eliot; President of Harvard College dated February 6th, 1900 (Harvard College, 1901). In their correspondence with Eliot, the men broach their plan to bring "as many Cuban teachers as possible (perhaps 1000 or more) to the United States next summer" and ask the college president to assist them by waiving the cost of tuition for the six-week summer program (Harvard College, 1901, p. 36). Received by Eliot on the twelfth of February, he promptly called a special meeting for the thirteenth, of the President and Fellows of the college to discuss the letter's contents (Harvard College, 1901). The result of the meeting was that the Fellows agreed to approve the request if Governor-General Leonard Wood, also a Harvard alumnus, was in support of the voyage. A hasty exchange of telegrams back and forth between Cambridge and Havana elicited the Governor-General's strong endorsement of the project a few days following the meeting. Shortly thereafter, Eliot sent a brief telegram to the Superintendent of Schools in Cuba: "Frye, Havana. Yes, Eliot" (Harvard College, 1901, p. 37).

This short affirmative response to the men's request started a whirlwind of activity on the part of Frye. Following the positive response from Harvard, Frye published the initial proposal in the newspapers of Cuba and awaited what he expected would be a favorable response from the teachers of Cuba. The resulting vigorous discussion in the press and in public venues pointed out an immediate clash of culture between the U.S. educator and the Cuban school teachers. Cuban women, who were not married, as were the vast majority of the female school teachers, would not travel without a chaperone. This was not something that any of the U.S. men involved in the decision or planning had considered. Along with the newspapers, the Catholic Church led

opposition in many places across the island to the plan for unmarried women to travel alone. Eliot, in his annual report, suggested that the problem was due to the Cuban people not being familiar with Frye and perhaps that Frye was unfamiliar with them. “Superintendent Frye was at some disadvantage, because he had not travelled over the island, and was personally known in Havana and the immediate neighborhood only” (Harvard College, 1901, pp. 37-38). Governor-General Leonard Wood used very similar language a little later to describe Frye’s regional view of Cuba:

One great trouble with Mr. Frye is that we have not been able to get him out of Havana. Practically his entire time has been spent within three miles of the Palace and as a result his ideas of Cuba and Cuban affairs generally very vague. (Wood, 1900b, p. 1)

Both of these views on Frye’s opinion of Cuba appear to be accurate. However, in his defense, it would be rather difficult considering the workload presented to him on his arrival in Cuba for Frye to have been able to tour the island with any frequency.

Despite the initial negative press, interest amongst the school teachers on the island quickly grew. In order to quell any lingering concerns and to fully plan out the expedition, Frye travelled to Washington, D.C. and then on to Cambridge, Massachusetts early in April of 1900. According to Eliot, Frye’s stop in Washington was to meet with Secretary of War Elihu Root in an effort to secure the use of military transport ships to bring the Cuban teachers to Harvard (Harvard College, 1901). Once ensured that the secretary was supportive of the plan, Frye travelled to Cambridge to finalize plans for the logistics and the education part of the program. While Harvard College agreed to provide the summer program tuition for the Cuban teachers, lodging and meals needed to be provided for by the teachers themselves or through some sort of community support. It was decided that a subscription (a common method of charitable support

from the time period) would be offered in the Boston press in order to garner financial support from the community. The response from the people of Boston more than met the targeted amount of \$70,000 with \$71,145.33 raised in a very short time period (Harvard College, 1901, p. 38). With all of the logistical support in place in the U.S., a plan of coursework for the summer program finalized, and a means of payment provided, Frye returned to Cuba to manage the task of identifying the teachers who would go to Harvard.

Having returned from Cambridge, Alexis Frye was prepared to publish the official invitation from Harvard for the Cuban teacher summer school program. Released to the public on May 16, 1900 under Circular No. 9, the invitation from such a prestigious university created much discussion amongst the Cuban teachers. In order to offset much of the talk concerning the unescorted female teachers on the trip, Frye gave special care to explaining the accommodations on board the ships and at Harvard. Men were to be berthed on separate decks from the women while aboard the transports and were to reside in dorms at the university, while women were to reside in homes around the college. Most importantly the young female teachers were to be under constant vigilance by a chaperone assigned to each small group of ten to fifteen women (Wood, 1900f).

The course of study announced in the Circular contains classes in English where “attention will be paid to the pronunciation, the acquiring of a vocabulary of common words, the reading of simple English, and the elementary grammar of the language” (Wood, 1900f, p. 344). In addition to English, the basic course selection offered courses in History, Geography, School Organization and Management, and General Culture. Several additional classes normally held during the summer were also open to the Cuban teachers (Wood, 1900f). According to the

annual reports of the President and Treasurer of Harvard College for 1899-1900 the coursework that was eventually used was very similar to what was initially planned:

The plan for education comprehended (1) two lessons a day in English; (2) a course of eighteen lectures in Spanish on Physiography, illustrated by as many excursions to different points of geographical interest in the neighborhood of Boston; (3) two courses of lectures in Spanish on historical subject, - one on the history of the United States, the other on the history of the Spanish colonies in North and South America; and (4) lectures on free libraries, on the organization of American schools, and on imitation and allied faculties in children. (Harvard College, 1901)

In the section on teacher selection, Frye's voice is very apparent in the text of the announcement. His desire was for the "ablest and strongest teachers to be selected for the trip" so that an "able representation" would show the "marvelous growth of the public schools of Cuba", was an attempt to show to the people of the U.S. that the Cubans were of equal measure to their own (Wood, 1900f, p. 346). In an attempt to dissuade the older teachers from going on the excursion, Frye stated that "Teachers of strong physique, as well as quickness of perception and originality of thought, should be chosen" (p. 346). Following his perspective of local control over school matters, Frye encouraged the town *alcaldes* to make the final selection, albeit under the guidelines he had established. The announcement concludes with sections on the climate of Boston during the summer, suggested clothing for women and men, descriptions of the residences, allowable baggage, and the availability of medical care while on the trip.

Despite his excitement over the development of the Harvard trip, Frye was enraged to discover that Wood and Lieutenant Hanna had developed a new school law for the island in his absence. Two main issues of the school law were stated as changes that Frye appeared opposed

to accept. Frye's original school law had created local boards of education that were filled by appointment of the local mayor. Citizens of the town who were on the town council were not eligible to serve on the school board. This gave almost unlimited power to the *alcalde* or mayor of each town. Due to the problems associated with the singular control of the schools that resulted from Frye's school law, Hanna's school law required that the school board be elected from the local population. A second change was in the area of teacher salaries. Under Frye's plan, teacher salaries were specific to the size of the city or town in which the teacher worked. For example, teachers in Havana earned \$75.00 per month, with those who taught in Cárdenas and Cienfuegos earning \$60.00 for the same time period. Teachers in all other municipalities were paid \$50.00 per month with the exception of those teachers of incomplete schools or assistant teachers who received \$30.00 per month (Brooke, 1900a, p. 460). The majority of these salaries were in excess of what was being paid in comparable schools in the U.S. at that time (Wood, 1900a).

Under Hanna's plan as stipulated in Article 76, teachers in the different districts had their salaries reduced \$10.00 per month across the board (Sanger, 1900). This reduction should have come as no surprise to Frye since Wood had announced on January 24th, 1900 under Circular No. 2 "that all salaries would be adjusted as soon as certificates of various grades have been issues (Wood, 1900a, p. 341-342). What appears to have upset Frye, as he asserted in his response to Elihu Root's testimony in the Wood hearings, was that the school teachers would not learn of the reduction in salary until they returned to Cuba since the new school law was slated to go into effect on June 30, 1900, about a week after they had left for Harvard (Frye, 1904).

The teachers began their excursion on June 22, 1900 boarding one of five Navy ships that stopped at fourteen different ports across the island (Harvard College, 1900). The total number

of teachers who would travel to Harvard has been reported with wide variance by several authors. However, the most accurate account would seem to be ascertained from the cables issued from Governor-General Wood's office in Havana and reprinted in the Harvard College Annual Report of 1900. In the first cable dated June 29, 1900, Wood listed a total of 456 male teachers and 591 female teachers who boarded ships headed for Boston. He followed this with a cable sent on June 30, 1900 that added an additional 156 men and 70 women that join the rest of the teachers headed to Cambridge. The total number of school teachers was somewhat less than the total number given of 1273 due to the additional travelers the Cuban school boards sent to accompany the teachers. According to President Eliot of Harvard College, there were 1,181 public school teachers on the expedition. In addition to the public school teachers, other academics and chaperones accompanied the travelers including "92 being teachers in the University of Havana and the Institutes, private school teachers, and Cuban chaperones and interpreters, together with three physicians and two priests" (Harvard College, 1900, p. 48).

When the time came for travel, Frye accompanied the teachers to Cambridge on board the U.S.S. Sedgwick, one of the five U.S. Navy ships used to transport the expedition to the U.S. While en route, according to Angulo (2012), Frye engaged in a physical altercation with the ship's quartermaster. Enraged over the quartermaster's treatment of the Cuban women in the group who were required to wait a long time in the heat of the sun on deck of the ship before being assigned a cabin, Frye is alleged to have "punched out" the officer, turning him instantly into a hero for the Cuban teachers and a villain to many who saw the Cubans as culturally deficient to the U.S (p. 1). This event is symbolic of the turning point in Frye's perspective of the island and people of Cuba. Although the incident has been reported as a scuffle and a one-punch fight by Angulo (2012), it was symbolic of Frye's turn towards the Cuban people and

spoke volumes about his emerging view of the U.S. as a power intent on obtaining Cuba through annexation and his desire to assist the Cuban people counter that attempt.

Having come from a family where his father was a progressive Republican Senator from Maine, and his friends and acquaintances were of similar mind regarding the inherent destiny of the U.S. to expand its borders, Frye began his time in Cuba from the perspective of belonging to a superior people helping an inferior population. His patriotism and desire to support the U.S. is evident in the letter written to Elihu Root seeking employment, and in his first attempt at legislating school law on the island. While Frye's school law appears to empower the local population through the creation of local boards of education with the power to hire teachers and control budgets, the perspective that he alone could draft a law for the schools of Cuba, without the assistance of the educators from the island, speaks to the concept of having a superior perspective of self and an inferior one of the Cuban people.

Starting from the perspective of superiority when he arrived in Cuba, Frye's view changed radically by the time he left the island. During the course of his thirteen month tenure in Cuba, it appears that Frye began to view the issues affecting the people of Cuba from the perspective of a Cuban. Some examples of these changes exist in his production of a teacher's manual written in Spanish while the majority of other textbooks brought to the island were written in English. A second aspect was his embrasure of the Spanish language in his correspondence with his superior officers; often inserting colloquial phrases such as referring to past dates as "ultimo" or last. His defense of the school teachers prior to travelling to Harvard, during his time onboard the U.S.S. Sedgwick, in Boston, and upon his return to Cuba were in direct opposition to the perspectives held by many of his U.S. contemporaries. An additional aspect was his courtship and marriage to a young Cuban school teacher he met while in Cuba

who held decidedly independence focused perspectives (Frye, 1900b). However, perhaps the most telling concepts of his transformation in perspective were his statements in his letter to the Cuban people dated December 17, 1900. In this relatively long letter, Frye asserted his desire to “tender to the Cuban Standard the same loyalty that I render to the “Stars and Stripes” of my native country. Both shall be forever entwined in our hearts and in our home” (Frye, 1900b, p. 1). In addition Frye stated that his “love for the “Lone Star Banner”, as the symbol of sacrifices and liberty, and at the same time, my love for the sons of Cuba, whom I shall soon have the right to serve by virtue of still closer ties,” indicated his desire to be an integral part of the island and of its people (p. 1). Looking back to Ortiz (1949) I could argue that by the middle of December of 1900, Frye exhibited many of the manifestations of *Cubania*, the desire to be Cuban. While the events of Frye’s transformation are not the topic of this study, it is important to recognize that his perspective changed during his time on the island. That changed perspective made him dangerous to men like Root and Wood who were both pro-annexation. If there plans for the eventual annexation were to come to fruition, Frye would have to be dealt with.

By all accounts, the excursion to Cambridge for summer schools for the teachers of Cuba was a resounding success (Wood, 1901a). Although Frye had specifically requested that the local mayors were to select teachers who were younger, would be able to endure the rigors of the lengthy trip abroad, and once they had returned home to Cuba could instruct those teachers left behind, the *alcaldes* selected many older teachers. The reasons given for this by Frye was the belief that the older men and women would temper the behaviors of the younger teachers, acting as moral guides. While Frye does not discuss the age range of the group, he did question the health of several older male teachers who attended the program. Fortunately, all of the teachers, chaperones, and others who went on the voyage arrived back in Cuba safely (Wood, 1900f).

Despite the challenges with language, the age and health of some of the Cubans, and the differences in culture, President Eliot, Alexis Frye, Governor-General Wood, Secretary Root, and others saw this as an excellent method of introducing the Cuban teachers to U.S. culture. While each of these individuals had their own underlying purposes to encourage the summer education program at Harvard, Frye's is unique amongst his fellow U.S. citizens in that he viewed the excursion as a means of empowering his fellow teachers, not as a means of inculcating the culture of the U.S. upon them.

During the time that Frye was in Cambridge and the Cuban teachers were engaged in the summer school program, the new school law drafted by Lieutenant Hanna was introduced. Once the new School Law was published in Cuba and then reported in the newspapers in Boston, several of the teachers, according to Frye, came to him and to President Eliot of Harvard to express concern that they would lose their jobs once they returned to Cuba based on the requirements of the new regulations (Frye, 1904). The reduction in pay and the requirements for recertification under Civil Order No. 279 gave many teachers cause for concern according to the Superintendent of Schools. Frye cabled the Secretary of War to inform him of the problem at Harvard. Upon hearing from Root that the teachers were very concerned over the new law, Governor-General Wood rushed north to Cambridge to assure the teachers that they would not lose their jobs when they returned to the island.

Although Wood stated that the new School Law would not cause any of the teachers to lose their jobs, the structure that was put in place by the new law did cause a few teachers to not receive reappointments (Frye, 1904). This was almost entirely due to the introduction of the teacher examination and certification process required under Civil Order No. 279. The purpose of the certification process was to ensure that the teachers of Cuba were qualified to be in the

schoolroom. In the rush to develop schools across the island early in the year, a large percentage of the teacher population was hired without any previous experience in the classroom. According to Varona (Wood, 1901a), with the rapid increase of schools across the island, teachers were put in place without much discrimination as to their qualifications. He also asserted that despite their lack of experience, the novice teachers, as a whole, had performed very well. Civil Order No. 279 was designed, in part, to eliminate the gaps that existed under Frye's school law, especially concerns such as teacher qualification exams.

The majority of the confusion regarding the new school law amongst the teachers attending Harvard appeared to have been manufactured, or at least inflamed by Frye. In a lengthy letter written to Elihu Root, dated August 6th, 1900 Governor-General Wood directly attributes the unrest to Frye's actions with the Cuban teachers (Wood, 1900c). "My trip to Boston developed the fact that Mr. Frye is I believe to a great extent directly responsible for the excitement and agitation among the teachers" (p.4). Wood alludes to sources "in a position to know" about Frye's activities regarding the unrest, and states that "his attitude was one of self advertisement and troublemaking throughout" (p.4). Frye came close to taking responsibility for the teacher trouble at Harvard in his response to Secretary of War, Elihu Root's testimony regarding Wood's promotion in 1904. While not directly attributing the unrest to himself, he appeared to have been the intermediary between the teachers and Governor-General Wood when the General visited Cambridge in August of 1900 and asserted that he should have approached the Governor prior to the law being released (Frye, 1904). The relationship between Frye and Wood appeared to have hit a breaking point for both men during this excursion. Immediately after informing Root that Frye was the agitator of the teacher trouble at Harvard, Wood announced that he had found in the Assistant Secretary of Public Instruction "a Cuban of rare

ability and good sense” who has organized the summer school program on the island “without assistance” (p.4). This appears to be Dr. Echevarría who had been appointed in January to the position of Sub-Superintendent of Public Schools. Throwing one final barb at Frye in his letter, Wood tells Root that Charles Eliot “understood thoroughly, however, Mr. Frye’s lack of executive ability in large affairs” (p. 4).

In this private correspondence with Root, Governor-General Wood appears to be building a case to discharge Frye from his position. He has identified him as the source of the agitation amongst the teachers at Harvard, pointed out that his office was “in a state of pretty serious confusion”, and informed the Secretary that an able replacement was close at hand (Wood, 1900c, p. 4). Wood does not receive a response from Root that encourages him to dismiss Frye, perhaps due to Frye having visited Secretary Root on his way back from Harvard to Havana, also it appears that Wood moved on to other issues shortly after returning to Cuba. Frye, however, despite the problems at Harvard, returns to work in Cuba, and then shortly thereafter on September 24, 1900 attempts to resign (Frye, 1904). Wood mollifies Frye for the short term apparently still not ready to turn the control of the schools over to the Cubans.

During the fall of 1900, Frye began to court a young school teacher he met on the trip to Harvard. *Señorita* Maria Teresa Arruebarrena of Cárdenas, noted as both a principal and a school teacher in different newspaper articles, agreed to wed Frye on New Year’s Day, 1901. *Señorita* Arruebarrena, according to a letter written to the people of Cuba by Frye dated December 17th, 1900 was very much in support of independence for Cuba and apparently was the one responsible for his redirection regarding Cuban independence (Frye, 1900b). As a present to the Cuban people on the eve of his wedding, Frye had printed 100,000 copies of the Cuban National Anthem, *La Bayamesa*, and distributed them throughout Havana, thoroughly

angering Wood (Wood, 1900d). However, the statement made by Frye in the above referenced letter is what especially concerned Wood and other annexationists:

Cuba is not now nor will ever be again a Colony. The time had come for her to occupy her true position among the nations of the earth. Thanks to the valor and sufferings of her heroes she has secured the incomparable prize of liberty, and finds herself now under the necessity of defending it, not now against one single Power but against the whole world. The sphere of her action and of her responsibility is now much broader and in ideas and facts Cuba should endeavor to build a nation out of a young Colony. Cuba must look beyond the cruel struggle of the past and prepare her sons to defend the liberty that her heroes have conquered. (Frye, 1900b, p. 2)

Wood was aghast and quickly fired off a letter to Root including a translated copy of Frye's letter. In this short missive to the Secretary, Wood stated that Frye was going on leave for three months beginning the first day of January and that "it will probably be for the best interest of the schools for him to remain away. I think he means well, in a way, but he is emotionally dishonest" (Wood, 1900d). On January 8th, 1901, apparently in response to his growing lack of trust in the Governor-General's perspective on Cuba, Frye tendered his resignation (Wood, 1901b) (Frye states the date as January 9th, 1901 Frye, 1904, p. 42). Having served slightly over fourteen months as the Superintendent of Schools of Cuba, Frye returned to the U.S. with his new bride and moved to Cambridge. In the years immediately following the occupation, Alexis Everett Frye was not much heard from in national or international affairs until 1904, when in reaction to his reputation being sullied by Elihu Root in hearings regarding the promotion of General Wood, Frye published a rebuttal of the charges made against him by Root. In the lengthy response, Frye collected numerous examples of his good work and attempted

interactions with Wood. In defense of his reputation, he also collected letters of support from the many Cuban and U.S. individuals he worked with in Cuba. In the end, Wood received his promotion, and Root did not apologize.

Major-General Leonard Wood: Military Governor-General 1899-1902

Wood was one of only two key individuals that emerged during this study who was present in Cuba from the U.S. military intervention in 1898 up to the surrender of the island to Cuban sovereignty in mid-1902. An ardent annexationist, Wood worked throughout the time he was in Cuba to support the end of U.S. control over the island. Always a pragmatist, he saw the opportunity Cuba presented for his future as well as that of the U.S. Many of his letters and reports are peppered with personal views on the feasibility of commercial opportunity for U.S. firms. Almost from the time he was put in command of the city of Santiago in July of 1898, Wood focused his future on becoming the governor of the island. During the year and seven months between the cessation of hostilities and his transfer to Governor-General, Wood took almost every opportunity available to showcase his successes in the eastern province of *Oriente*. His success in self-promotion earned him the ire and a stinging rebuke from, Governor-General Brooke in mid-summer of 1899. In a letter to Theodore Roosevelt dated August 3, 1899 Wood complains of the poor treatment by Brooke stating: “I have nothing in the world against General Brooke, but he seems to have a great deal against me, solely because I have justly, or unjustly, obtained a greater share of public commendation than himself” (Wood, 1899b). Like his close friend Roosevelt, Wood was a natural politician. He was intently aware that if he wanted to earn the top spot in Cuba he would need to promote not only his agenda, but also his exploits on the battlefield. For an aging soldier like Brooke, the self-aggrandizement employed by Wood was unseemly.

General Wood recognized early on that the best way to achieve his goal, while at the same time securing Cuba for the U.S., was to control the system of education on the island. By controlling the management of what was taught on the island, Wood believed that he could encourage the students to influence their parents to call for the annexation of Cuba by the U.S. During the remainder of his time in Cuba, Wood worked diligently through official orders, both military and civil, to force through the annexation of Cuba by the acclamation of her citizens. His opportunity to introduce the educative reform he sought became a major focus when he was given the opportunity of total command in late 1899. In referencing the work of his predecessor on education in his first annual report, he was sparing in his praise and effusive in his condemnation of the lack of progress experienced under General Brooke. Alluding subtly to his earlier plan of education that he had submitted from Santiago, Wood highlighted the minor successes that had been experienced under his guidance in his report:

It was evident, and had been ever since the military occupation of the island, that if a stable government was to be established in Cuba opportunities must be given to the children to obtain an elementary education, and with this object in view vigorous measures were instituted, looking toward the organization of public schools and supplying them with books, materials, etc. (Wood, 1901a, p. 95)

Receiving orders to take command of the island on December 20th, 1899, Wood had been working behind the scenes for months in order to have Brooke reassigned (Wood, 1900a). With the new year looming before him, Wood took control of the island and began to enact a plan aimed at eventual annexation of Cuba in the belief that he was carrying out orders supported by President McKinley and Secretary of War Elihu Root. While neither man openly voiced an interest in any other direction for Cuba than what had been established in the Joint Resolution,

Wood believed that they were supportive of his efforts towards the restructuring of the school system and annexation by acclamation.

In many of his letters to future President Theodore Roosevelt, Wood speaks openly of the benefits of annexation of the island. Although he is candid in his letters with the Secretary of War, their private discussions were apparently more to the point with both men confidentially in agreement on “the Cuba problem.” In addition to having Root as a sounding board, Wood also had the ear of the President with whom he often corresponded following the victory in Santiago de Cuba. His official reports also tout the commercial benefits of the different regions of the country, most notably of the easternmost province, for U.S. businesses. In his Annual Report dated March 25th, 1899, Wood describes the countryside, resources, and the profit-making opportunities for investment by U.S. firms, pointing out prospects that commercial firms could exploit (House of Representatives, 1900).

As can be seen in the examination of Alexis Frye above, Wood’s major foil during his tenure as the Governor-General of the island was the Superintendent of Schools. The two men did not see eye-to-eye on many subjects from the moment Wood took command. Just prior to Wood’s arrival in Havana, Frye had been appointed the Superintendent of Schools for the island under Governor-General Brooke on November 2nd, 1899 (Brooke, 1899). His perspective on annexation of the island reversed during his time in Cuba, turning from a supporter of U.S. control, to someone that was diametrically opposed to anything other than Cuban independence. During the course of their time together, Frye actively resisted many of the restructuring methods designed to “Americanize” the Cuban schools that Wood sought to institute. During the thirteen months of Frye’s engagement under Wood, they clashed several times, primarily on financial matters related to the schools, but also, at the end of his time in Cuba, on Frye’s personal politics.

When Wood was first assigned to command of the city of Santiago in mid-1898, his primary concerns are very similar to that of Governor-General Brooke in early 1899, famine and security (Brooke, 1900). However by July of 1899, conditions in the province had improved markedly. Much of the starvation evident at the immediate end of the conflict had been eased by the distribution of Army rations. Men were back to work, transportation and commerce was being addressed, as were issues related to health and sanitation. The remnants of the Cuban Army were switching from military action to gainful employment rebuilding lighthouses, the port, hospitals, roads, and municipal buildings of the city (Brooke, 1900). Absent from discussion for several months, schools had just recently emerged on the Governor's agenda as was evident by his request for information relating to school conditions in mid-March of 1899 (Small, 1899b).

Wood, however, recognized that the schools were the path through which the island could be annexed much earlier and was well underway with a plan of action. During the five and a half months between the surrender of the Spanish in Santiago and the transfer of the island on January 1, 1899, Wood had improved conditions in the city to the extent that he began plans for the reinstatement of a school system. Not willing to wait for an island-wide school law, the General had one commissioned in late 1898 by his own staff in Santiago. Once completed, he sent the plan of education to Governor-General Brooke who received it on January 25th, 1899 (Brooke, 1900). Despite the necessity of such a plan, Brooke disregarded Wood's proposal and ignored the requests from Santiago for an official structure on which to base a new school system for the island. Brooke's failure to act on his report began a year of frustration for Wood who, while willing to follow orders, was also predisposed to action when no instructions were received from above. Known as a man who was not willing to sit idling when he believed there

was a need for action; Wood began to conspire with his friends in Washington to push forward his vision for an “Americanized” Cuba. If this meant that he had to skewer his immediate superior officer during the process, Brooke would become an unfortunate late casualty of the campaign to capture Cuba for the U.S. As the year progressed, Wood, Roosevelt, and Senator Henry Cabot Lodge (1850-1924) took every opportunity to shine a light on Wood’s agenda of education for Cuban children.

Wood’s first official comments regarding the state of the schools in Santiago de Cuba are dated March 25th, 1899 and are a part of his report on the Department of Santiago and Puerto Príncipe Cuba. In an apparent attempt to goad Governor-General Brooke into action to act on his plan of education, Wood adds the following description to his Annual Report on the province. Subtitled “The State of Education,” Wood gives a very brief analysis of the schools in the region:

By reason of the prolonged disturbance of the country, education, both public and private, is very backward. Lack of facilities for transportation prevents the attendance at school of children who live at any distance from the centers of population, and even in those centers lack of means retards the development of anything like an educational establishment. No school property exists, nor is there a single endowment of any nature for educational purposes in the province. (House of Representatives, 1900, p. 830)

After a spring and summer of inaction by Brooke, on September 20, 1899, Wood stated that he had seen some progress regarding the opening of schools in the province under his control. He proclaimed that in the city, 60 schools were in operation, with some two hundred open across the province (Brooke, 1900, p. 368). However, despite the opening of schools, Wood argued that, “The immediate establishment of a good school system is imperative. The present system is

inefficient and almost worthless” (Brooke, 1900, p. 369). He follows this rancorous statement with the assertion that the teachers are not well prepared to teach, and that there are no school houses as they would be recognized in the U.S. anywhere in the province. In order to reinforce his suggestion of developing a sound system of schools for the island, and promote his agenda of “Americanizing” the Cuban schools, Wood argues that English should be taught in the schools and that the system of management should match those from New York, Massachusetts, or Ohio (Brooke, 1900).

The inaction that Wood perceived was occurring in Havana was, as I have shown earlier, one of perception. Brooke and his staff of four Secretaries were overwhelmed with the immediate nutrition, safety, and health needs of the Cuban people. Their initial activities focused mostly on improving access to food and healthcare more so than other less important ventures. In addition, the legal system was in need of a complete restructuring in order to begin the transition between the Spanish system of jurisprudence and the one used in the U.S. However, it was not just the immensity of the task before them that had slowed progress towards returning the country back to a sense of normalcy; several of Brooke’s early decisions that were focused on parsimony were preventing rapid advancement. One clear early mistake committed by Brooke was the joining of the Department of Justice with that of the Department of Public Instruction. These two distinct areas of government in reality required separate leadership as the tasks involved were entirely out of step, one with the other. With the connection of these two different departments Brooke all but assured that the amount of work would be beyond the capabilities of one man to manage. Sitting and waiting in Santiago for action from Havana, Wood’s impatience grew while the Governor-General took no action on the existing Spanish school law or his suggested plan of education other than to dismantle the pension system for

Cuban teachers, close the Normal Schools, and end *Jubilación*. *Jubilación* was a type of retirement where a proxy teacher was assigned to a school where an aging teacher had retired. The proxy teacher received a part of the salary with the remaining part going to the teacher of record (Liras, 1895). Wood's frustration with Brooke's lack of attention to his proposals began to show about mid-summer in a letter he sent to Theodore Roosevelt. Dated July 12, 1899, Wood states:

All of this is only a growl of mine to you personally and confidentially, but it is maddening to see our representatives in the hands of transparent little rascals, being led into pitfalls which a child ought to see. One year, or even six months, of decent candid, courageous government here will turn public sentiment all our way and the problem will be solved, so far as Cuba is concerned. Six months more of this thing and no one will know what will turn up. (Wood, 1899a, p. 1)

Several key aspects of Wood's perspective of what should happen to Cuba are evident in this short paragraph. First, Wood alluded to a lack of mature leadership in Brooke, a theme that emerged in a more forceful manner shortly thereafter. Second, his perspective of the Cuban people as "little rascals" speaks to a view of inferiority of the natives of the island. Third, and indicative of his desire to see the island annexed, he believed that if only a strong occupational government was in place, Cuba would do what the U.S. desired and seek to become a part of the United States. The concern that is apparent in Wood's tone is due primarily with his frustration with Brooke's Military Order that left the existing Spanish legal code in place until it could be replaced by new legislation. While this choice was one that Brooke saw as expedient considering the immensity of the work ahead of his staff, it caused, as has been shown above, numerous problems as the two different cultures came together.

Wood closes this particular letter to Roosevelt with perhaps the clearest statement of what he desired would occur, the suppression of the growing movement for an independent island-based government (Wood, 1899a). As an annexationist, Wood was working in the opposite direction than were many members of the Cuban cabinet. He recognized the subtle interference that some of the Cuban representatives were placing in front of the attempts at progress of the U.S. restructuring programs, and he was searching for a way to circumvent these obstructions. This letter to Roosevelt, while early in the process of Wood's time in Cuba is prescient of the difficulty he would experience later in his term as Governor-General. The final half of the last paragraph of the letter speaks to Wood's biggest concern:

Then these little rascals who have made all the trouble will be, or think they will be, in a position to have the government turned over to themselves and they will be virtually in possession of the situation/ In other words the system of civil government which is being developed here has got to be uprooted and suppressed entirely in the end and every day makes it more difficult to do so without more of [sic] less trouble. (Wood, 1899a, p. 2)

Although Wood was speaking privately to Roosevelt, he knew that his words would be spread to others of likeminded thought back in the U.S. However, his candid assertions regarding what needed to take place in order to annex the island were beyond the extent that the stateside annexationists were willing to go at that time. Despite the lack of action from above and from his supporters stateside, Wood pushed forward, striking out on his own as he had at the base of San Juan Hill.

By August 3rd, 1899, Wood had selected his target and had determined his course of action; Brooke must go if he was to enact the plan for eventual annexation. Soliciting the help of Theodore Roosevelt, Wood drafted a letter that excoriated the Governor-General. After stating

that he had nothing against Brooke, Wood began a list of issues that were not being handled in an expeditious manner under the Governor-General. “The condition of the island is disheartening. I tell you absolutely that no single reform has been instituted which amounts to anything up to date” (Wood, 1899b, p. 1). Following this blanket statement, Wood gets down to more specific complaints about Brooke’s reform program, focusing first on the lack of progress towards restarting the island’s schools. “Half our summer vacation is gone, educational matters are where they were last year” (Wood, 1899b, p. 1). Having selected his target and fired the opening salvo, Wood now focused intently on a cause for which he could garner support both on the island and back in the U.S., the reconstruction of Cuba’s abysmal school system.

October 9th, 1899 saw Wood in full lobbying mode for Brooke’s job. Eliciting the help of his friend Senator Henry Cabot Lodge who regularly made the rounds of the Washington social circles; Wood had him politely corner political support from pro-annexationist politicians in the capital. Wood also relied on his old friend, and now Governor of New York, Theodore Roosevelt to stump the Nation’s capital, and the Army, for additional support regarding his promotion. Roosevelt had approached both the President and Elihu Root on the topic of replacing Brooke, but on October 9, 1899 was unable to say whether or not they were supportive of the change (Roosevelt, 1899). Following several discussions with Root, Roosevelt wrote to Wood stating, “I told him I was sure he must realize Brooke’s unfitness, and was sure that he could not but see that you would have to have the island if we were to stay there” (Roosevelt, 1899).

After several months of political wrangling in Cuba and Washington, Root had made his decision. On the 13th of December Wood learned that he was to replace Brooke as Governor-General of Cuba. A disheartened Brooke took the news in stride and continued to manage the

affairs of the island for another seven days. Brooke's last act as the Governor-General of Cuba was to issue General Order No. 52 relinquishing command of Cuba to Wood (Brooke, 1899). By the 20th of December the official order had been issued by the Secretary of War and the now Governor-General Wood officially took command of the island (Wood, 1901).

One of Woods first actions as the new Governor General was to divide the departments of Justice and Public Instruction into two distinct departments (Wood, 1900f). This was accomplished under Civil Order No. 1 dated January 1, 1900 that named the new departments, as well as the newly appointed Secretaries (Wood, 1900f). Wood took this action due to his perception of the immense amount of work each of the departments needed to undertake, and as an effort to jumpstart the flagging school reform. By dividing the departments Wood hoped to allow the Secretary of Public Instruction to focus intently on the schools without the distraction of the legal system. Hiring *Señor* Juan Bautista Hernández Barreiro as the new Secretary of Public Instruction, Wood set him to work organizing the department (Wood, 1900f, p. 3). Prior to his stint as the Secretary of Public Instruction of Cuba, Barreiro was a professor of Roman law at the University of Havana and was, according to Wood, "a gentleman of distinguished attainments" (Wood, 1901, p. 6). The hiring of a new Secretary of Public Instruction effectively placed Alexis Frye under Barreiro, however with the autonomy Frye had in his position under Military Order No. 210 and his responsibilities under Civil Order No. 226, the change in departments and bosses accorded little notice. During this initial flurry that reorganized his civil command, Wood also appointed José Varona to the office of Finance (Wood, 1900f, p. 3). Within a few months, Varona was transferred to the vacant Secretary of Public Instruction position when Barreiro resigned for health reasons.

Wasting little time, in the ten remaining days of the year and the first thirty of the new year, Wood released a flurry of civil orders aimed at the schools, the board of superintendents, and the department of Public Instruction. Civil Order No. 250 assigned several professors to vacant chairs at the University of Havana quickly after Wood took command of the island (Wood, 1901, p. 95). On December 30, 1899, Wood issued Civil Order No. 251 that created a board of superintendents with Frye as the president of the new board, but did not make it official until almost the end of January (Wood, 1901). In order to place the men he had chosen for the board in the government positions he desired, Wood first named a Sub-Superintendent of Public Schools adding Esteban Borrero Echeverría (1849-1906) to this post on January 10, 1900 under Civil Order No. 8 (Wood, 1900f, p. 8). Next Wood added an Associate Superintendent of Schools under Civil Order No. 32, Dr. Henry Lincoln de Zayas, having him join Mr. Frye on January 22, 1900 (Wood, 1900f, p. 40). Two days later Wood officially created the Board of Superintendents of Schools for Cuba and named these three men to the board: Alexis Everett Frye, Esteban Borrero Echeverría, and Dr. Henry Lincoln de Zayas with Frye as the President of the Board (Wood, 1900f, p. 49).

With the Board of Superintendents of Schools officially formed, Wood began to present them with more discretionary power. Already enjoying almost unlimited authority over all school matters, based on the regulations contained in Military Order No. 226, Frye and his team are given even more control. Under Civil Order No. 52, dated February 7, 1900, the Board is given authority over the placement of Assistant Professors of the University, Heads of Laboratories and Clinics, and assistants to the Professors in the school of medicine taking away the authority historically assigned to the Rector of the University (Wood, 1900f, p. 67). Six days later they exercised that power and Civil Order No. 65 was published under direction of the

Superintendent of Schools; naming the professors of the institutes in Pinar del Rio and Mantanzas. In both of these institutes new chairs are opened for the topics of Universal History and Civic Instruction, Universal Geography and the History of America and Cuba, and English (Wood, 1900f, p. 79). These institutes were some of the first ones opened on the island since all were closed down early in the Brooke administration. February 19th witnessed the posting of Civil Order No. 76 that established the professorships at the new Havana Professional School of Painting and Sculpture (Wood, 1900f). The regulation, obviously penned by Frye, introduced few changes to the Professional School management other than adding more chairs and professorships to the school.

Two new institutes (high schools) were opened in March of 1900 by the Secretary of Public Instruction. The first was a school dedicated to “Arts and Trades” in Havana that was established under Civil Order No. 101 (Wood, 1900f, p. 126). This school’s list of preparatory courses were “Writing; Spanish Grammar; Geography and History; Industrial Economy, ... Mathematics, Applied Physics and Chemistry and their practical employment, ... Drawing and Descriptive Geometry; and Applied Mechanics and Technology” (Wood, 1900f,p. 126). These are taken in Combination with trades’ classes in carpentry, ironmongery, cabinet making, blacksmithing, boiler-makers and plumbing, brick and stone masonry, and electricity. The second was a school of Stenography and Typewriting that was to be held within the Institute of Havana. While the earlier mentioned Institutes are for high-school-aged students, this particular school was open to everyone free of charge regardless of age (Wood, 1900f). A third Institute was opened on April 24, 1900 for Commercial Studies. Civil Order No. 171 created this three year high school that required an age of entry of twelve years, with admittance necessitating an entry examination by the perspective student (Wood, 1900f). A school for Engineers and

Architects was opened in Havana on April 24th 1900 under Civil Order No. 176. The publication of the order contained an extensive list of required courses for all of the different specialties offered at the school (Wood, 1900f). This flurry of activity was essentially what Wood had been militating for; however, he had not counted on Frye's political agenda attempting to steer the process away from annexation and towards Cuban independence. Despite the differing ideologies of the two men, Frye's work at the beginning of his tenure was focused on modeling the schools after those in the U.S. To this end he established several courses of study that included typical U.S. school subjects.

During the first four months of the Wood administration schools at every level of education and across the island were reopening. Chairs were being established in the Institutes, Schools of Medicine, and the University. New courses were also included in the curriculum for the *institutos de segunda enseñanza* (high schools) focused on "American" history and Civics. Trade schools and high schools focused on Commercial Studies such as the management of businesses were also beginning to develop, especially in the city of Havana. The inclusion of the trade schools in the early restructuring efforts was not without purpose. While there were many individuals on the island who were proficient in the trades, Wood envisioned a population of loyal workers who would be employed by English-speaking bosses in U.S.-owned companies. By including English instruction in the course of studies in these schools, Wood intended to support this future need with tradesmen skilled in the language of their employers.

In a process that was reminiscent of a management-labor dispute, Wood was embroiled in a controversy associated with the teacher's salaries on two occasions. During the first event, Wood responded to the letters and petitions he had received regarding the proposed reduction in the salaries of the school teachers with Circular No. 2 on January 24, 1899 (Wood, 1900f). In

the preceding weeks, the newspapers of Cuba had been consumed with the discussion over the reduction of teacher salaries. The response from Wood was entirely one sided and was intended to quell the rising opposition to the teachers loss of prestige and money. Unfortunately Wood's response examined the salaries from a U.S. centered perspective where teachers were paid only a salary. Teachers in Cuba had achieved, over the years, a constructed income that included a base salary, a housing allowance, and money they would make from the admissions process for new students. All of these salary perks were removed under Military Order No. 226, (Frye's school law) on December 6th, 1899, under Governor-General Brooke. While teachers in the U.S. were often poorly paid in relation to their level of education and what was paid in comparable private sector employment, and their ranks were predominantly female in composition, Cuban teachers had historically been male, and fairly well paid. Not recognizing the cultural difference, Wood had responded from the perspective that U.S. teachers did not live in their schools, nor did they receive an income directly from student admissions (Wood, 1900f).

In Circular No. 2 Wood presented a list of the major cities of the U.S. that had teacher salaries equivalent to that paid in Cuba. With the teacher salaries of Cuba at a high level Wood showed that they compare dollar for dollar with cities such as New York and Chicago which had much higher levels of population (Wood, 1900f). Comparing the population of Havana to much smaller cities than New York and Chicago, such as Buffalo, New Orleans, and Pittsburgh; Wood stated that the equivalent salary should be much lower than the teachers are already receiving. In order to put an end to the growing disturbances regarding teacher salaries Wood closed the Circular with the following statement:

The teachers of Cuba can not fail to see that they have been accorded generous treatment, and no change will be made in salaries before the date named in the School Decree No,

226 (September 1, 1900). Having in mind the great task of preparing the Cuban children for citizenship – a task that calls for the highest effort of every patriot – the teachers are earnestly advised to cease further agitation concerning salaries, and devote their entire time to organizing their schools, thus proving which among them are worthy of the highest rank as educators. (Wood, 1900f, pp. 222-223)

Laden with allusions to patriotism and incorporating subtle threats, this statement by Wood is one that any business official of the early 20th century could have made in response to labor unrest in the U.S. Whether satisfied by his comments or not, the teachers stay in the schools and the task of reorganization moves forward, but the seeds of distrust of Wood's ends are beginning to emerge amongst the teachers of Cuba.

The second salary event comes in July of 1900 while the school teachers are in Harvard and leads to Superintendent of Schools Alexis Frye's eventual resignation. As an integrated part of the new school law introduced on June 30, 1900 under Civil Order No. 279, salaries of the school teachers were being reduced. The reduction was formulated under the reclassification of the school districts by size. Three divisions were utilized to categorize the cities of the island based upon population. Cities with a population higher than thirty thousand were classified as City Districts of the First Class. Those with a population between ten and thirty thousand became City Districts of the Second Class. All other cities, towns and villages were designated Municipal Districts. Every aspect of the school management was directed by these divisions by population size. As a means of focusing more on local control, Wood had directed the new school law to include the creation of local boards of education that would have control over many of the functions currently enjoyed by the local *Alcaldes* (Mayors) and Frye. Wood's

apparent intent was to put the control in the hands of the people of each town, rather than consolidating it in a Board of Education at the national level.

Upon reading the new law, Frye responded by attempting to foment unrest amongst the teachers who had travelled to Harvard. As was described in detail above, although General Wood traveled to Cambridge and spoke with the teachers, the distrust of his administration amongst them deepened following this event. While some of what Frye alleged occurred did appear in the school law as it was published on June 30, 1900, this was not new information to the teachers but had been discussed previously in Circular No. 2 dated January 24, 1900. It appears that Frye was more intent in consolidating power and less on teacher salaries than he made it seem in his response to Root's testimony (Frye, 1904). Frye may have also been reading into what was proposed in the new law. Under Civil Order No. 279, the determination of teacher salaries was assigned to the newly formed School Councils and had been moved away from the responsibility of the Superintendent of Schools as it was published under Military Order No. 226. In order to add clarity to this event and further investigate the friction between Wood and Frye, a review of what had occurred regarding teacher salaries follows.

Under Frye's school law of December 6, 1899, in section XXII school teachers were required to take an examination to receive certification to teach by the first day of September, 1900 (Brooke, 1899). As a provision to this section of the law, the Superintendent of Schools was charged with the signing of a certificate that made the teacher eligible to be hired by the municipal boards of education. The monthly salary amounts that were established under Frye's regulations granted \$75.00 for teachers in Havana, \$60.00 for those in the capitals of the provinces, Cárdenas, and Cienfuegos, and \$50.00 at all other schools. Assistants were to be paid \$30.00 per month regardless of where they were working (Brooke, 1899, p. 96). Although there

was no precedent for paying these levels of salary, Frye established the amounts in his school law. In Civil Order No. 279 the first reference to salary was in section 13 titled Teachers and Employees (Wood, 1900f, p. 630). Here it stated: “The council shall provide for the appointment of all necessary teachers and employees and proscribe their duties and fix their compensation” (p. 630). Specific salaries are not mentioned in the published school law until section 76 under the section titled “Boards to Control Schools and Appoint Officers” (p. 639). Here the salaries of teachers were lowered as follows:

(I)n Havana, sixty-five dollars; in the capitals of the Provinces and in Cárdenas and Cienfuegos, fifty dollars. In all other municipalities, forty dollars, except for all teachers in schools with an average attendance of less than thirty pupils, in which case the salary shall not exceed thirty dollars; and any person serving as a regular teacher of a school, and also having the supervision of not less than two other schools, shall be rated as principal on the rolls and receive the additional sum of ten dollars per month. (Wood, 1900f, p. 639-640)

In his self-published response to Root’s testimony in the Wood Hearings, Frye (1904) inflates the importance of this event and did not include any mention of the discussion under Circular No. 2. It appears that while Wood was pushing forward his agenda of developing schools and placing the control over them into local hands, Frye may have been angered by the diminishing power of his office.

In an effort to finalize a date for the inevitable teacher examinations, Frye published Circular No. 20 on November 19, 1900 under Civil Order No. 474 (Wood, 1900f). This regulation extended the time available for examinations and established the material that was to be covered in the tests. Originally set for the summer of 1900, the teacher exams were pushed

out to February 1901 by this Circular. In his reasoning for this, Frye stated three conditions that he observed: First, that the teachers were working diligently to learn the material; second, because of the problems associated with opening the new schools had prevented some teachers from studying as much as they wanted to; and third, the thought of upcoming examinations were an “annoyance” to the teachers (Wood, 1900f, p.1014). The tone of Frye’s Circular is one of a benevolent Superintendent looking out for his charges against the cold reality of the existing regulations. This is the same message he tried to impart to the Cuban teachers prior to and during the trip to Cambridge. Since the order that had established the teacher examinations by the end of August 1900 (Military Order No. 226 Frye’s own law) had been superseded by Civil Order No. 279 on June 30, 1900, which pushed out the examination period beyond October 1900, Frye was again inflating a problem that did not exist.

Alexis Frye may have been acutely aware that his days in Cuba were numbered. On September 14, 1900 Wood published the appointment of Estéban Borrero Echeverría as the new Commissioner of Public Schools of Cuba (Wood, 1900f, p. 794). The creation of the Commissioner of Public Schools was an executive position charged with managing the financial and quantitative aspects of the schools of the island. This duty had been previously under the control of the Superintendent of Schools. Effectively, by creating this position, Wood cut Frye’s power down solely to development of a course of studies. Having watched Governor-General Wood, over the course of a years’ time, slowly eviscerate the almost unlimited power of the Superintendent of Schools, Frye was ready to leave the island. Wood on the other hand had succeeded in developing a cadre of staff that would work with him in the direction of reforming the schools of Cuba to his vision. During the eleven months of 1900 that had passed up to this point, Wood had worked with military precision to create new positions, fill them with loyal

staff, and introduce new regulations that fit his agenda. In January he split the Department of Justice away from the Department of Public Instruction and hired a new Secretary to lead that division forward. Next, he created the position of Sub-Superintendent of Public Schools and placed two Cuban men in the positions, hired José Varona, first as the Secretary of Finance and then as the Secretary of Public Instruction on April 30, 1900, greatly weakening Frye's individual power. June 30, 1900 saw him introduce a new school law drafted by his loyal Aide de Camp Lieutenant Matthew Hanna further draining Frye's importance on the island by placing the Provincial Superintendents of Public Schools under the authority of the Commissioner of Public Schools (Wood, 1900a, p. 628). Wood then hired a new Commissioner of Public Schools on September 14, 1900 after creating the position on August 1, 1900 under Civil Order No. 368 (Wood, 1900f, p. 809). On October 11, 1900 Wood managed a public relations coup granting pensions to distinguished professors who had retired from the University of Havana. One small clause of Civil Order No. 423 is the caveat that the pensions will only be paid as long as the U.S. is in control of the island (Wood, 1900f, p. 952). Wood never missed an opportunity to add to his growing list of Cuban supporters for the plan of eventual annexation.

Frye attempted one last feeble thrust at retaining some power as the Superintendent of Schools on the island; however, the documents that he produced had the tone of a beaten man. Released on the same day, November 19, 1900, Civil Orders Nos. 474 and 475 outline the teacher examinations and the summer Normal Schools to be held the following summer (Wood, 1900f). These last two regulations developed by the Superintendent of Schools for the island show how far Frye had sunk from his height of power in December of 1899 and the total absence of it he now enjoyed under Wood's control. Both of these issues were concerns Frye had

resisted developing for months, now both had come to pass in regulation form directed by the Governor.

By the middle of December Frye looked almost desperate as he began his preparations to marry *Señorita* Maria Teresa Arruebarrena and then depart on an extended three month leave of absence. Saturday the 15th of December, 1900 Frye published an article in the Havana Post according to a clipping contained in a letter from Wood to Root dated December 19, 1900 (Wood, 1900d). The article was a listing of how Frye had distributed his salary for the work he undertook in Cuba to a variety of charities on the island. In light of what had been occurring between Wood and Frye, and his coming nuptials, it appeared to be a settling of accounts regarding his time in Cuba. On December 17th, 1900 Frye then published a letter titled: “To The Cuban People” (Wood, 1900d). The letter was a mixture of Frye proclaiming his loyalty to Cuba and the “*bandera de Yara*” (flag of Yara), and a request to the Cuban people to change a line in their national anthem, *La Bayamesa* (Frye, 1900b). While Frye may have been attempting to integrate himself deeper into the Cuban culture with this letter, Wood saw it as an affront to the people of the U.S. who he perceived were the “foreign powers, no matter which, that in coming years might presume to acts of tyranny” that Frye mentions in the letter (Frye, 1900b, p. 3).

Wood is clearly not distressed to be losing his Superintendent of Schools for three months; in fact he hints it should be much longer. In his letter to Root discussing the published articles of Frye, he states that Frye is going on leave for three months “beginning the first of January, and it will probably be for the best interest of the schools for him to remain away” (Wood, 1900d). Shortly thereafter, on December 31, 1900, Wood published Civil Order No. 526 appointing Alejandro María López as the temporary Superintendent of Schools of Cuba as the last act of the year (Wood, 1900f, p. 1104).

Nine days later, on the eighth of January, 1901, Alexis Everett Frye delivered his letter of resignation into the hands of the Governor-General of Cuba Leonard Wood (Frye, 1904). Wood accepted the resignation and the two men parted company and each other's thoughts until 1904 and the hearings in Congress regarding the promotion of Leonard Wood to Major-General in the U.S. Army. While Frye's chapter in Cuba had come to an end, Wood's still had much life to go. For the majority of his first two and a half years in Cuba Governor-General Leonard Wood had followed a course of action that he believed was in support of the aims of annexation. To this end he pushed hard to develop the schools on the island to match, as closely as possible, those in the U.S. As the year 1900 came to a close his superiors in Washington had recognized that the support for annexation of Cuba was slowly dying in the U.S. Beginning in early January the official letters from Root to Wood begin to take a decidedly different approach to the Cuba problem. This shift was exemplified in a letter dated January 9, 1901, where Root expressed his weariness with the opposition to annexation from both inside Cuba and from the U.S. Congress (Root, 1901a). Not long after this, on February 9, 1901, Root decided it was time to rein in Wood's exuberant push for annexation. In a reminder to Wood that Congress holds the strings to the official policy in Cuba not the military, Root stated:

In the meantime, until Congress shall have acted, the military branch of the government is bound to refrain from any committal, of the United States to any policy which should properly be determined by Congress, and, at the same time, so far as it is called upon to act or to make suggestions bearing on the course of events, it must determine its own conduct by reference to the action already taken by Congress, the established policy of the United States, the objects of our present occupation, and the manifest interests of the two countries. (Root, 1901b, p. 1)

Wood, who had been under the impression that he was leading the charge for McKinley and Root in Cuba, must have been stunned. However, for a seasoned soldier like Wood, following the orders of superiors was something one often had to do. He quickly shifted direction and picked up the banner of obtaining constitutional concessions from the Cuban Congress. Redirected by the Secretary of War to another target, Wood quickly delegated the management of the schools to his Superintendent of Public Instruction, José Varona, and the Commissioner of Public Schools, Matthew Hanna.

Hanna who had been with Wood since the invasion in 1898 had risen to the position of Commissioner of Public Schools and was in control over most of the islands fiscal and quantitative decisions on education. In concert with the Secretary of Public Instruction, José Varona, Hanna worked diligently to correct any deficiencies that arose in the school law. Few major changes were implemented during the year of 1901 with the exception of the teacher examinations and the introduction of a regular summer Normal School. In addition, a return trip to Harvard by 100 teachers was undertaken in the summer of 1901. Recognizing that the introduction of Normal Schools on the island of Cuba was impractical considering the island's present condition, arrangements were made with the New Paltz Normal School in New Paltz New York to provide teacher instruction. These items and several others associated with smoothing out the wrinkles in the School Law of June 30, 1900, combined to make the 1901 year a busy one for both Hanna and Varona.

Enrique José Varona: Secretary of Public Instruction of Cuba 1900-1901

On May 1st, 1900 one of the more influential educators of the island was appointed to the post of Secretary of Public Instruction for the island of Cuba. On that day Enrique José Varona y Pera (1849-1937) was appointed to succeed Barreiro who had resigned for health reasons

(Varona, 1901). Varona was very much focused on the restructuring of the University of Havana, and spent much of his time on this project. In a little less than three weeks, he had begun the challenging process of restructuring the University of Havana and taking on the recalcitrant professors of that venerable institution.

Varona began his plan to restructure the University of Havana due to the fact that many of the professors were not teaching and others were instructors in name only. The cost of maintaining the University was an astonishing \$639 U.S. annually per student, an unheard of sum at that time, an amount only exceeded by the Institute of Havana which cost \$811 U.S. annually per student (Wood, 1900d, p. 61). The total budget for the year 1899 for the University of Havana was \$262,530, with the Institute of Havana adding the cost of \$53,010 to the overall budget of the department (p.61). Varona saw these costs per student as excessive essentially because he did not believe that the investment was giving a positive return for the people of Cuba. Simply due to the fact that “it went principally toward increasing the already excessive number of lawyers, doctors, and chemists – a number far in excess of what is required in our meager population” (p. 61).

These low levels of attendance and the high cost per student were an artifact of the Cuban War of Independence. During the conflict, enrollment at the University of Havana had dropped markedly. In 1895 the University of Havana counted 671 students being instructed by 58 professors (Sanger, 1900). During the war student attendance at the University had dropped precipitously and the number of professors on the faculty grew until in 1898 just 380 students were being taught by 107 professors (Wood, 1901a, p. 62). Also as a product of the War, the increased level of the number of professors at the University was due to the closing of colleges and institutes in the provinces. As these institutions closed the professors were relocated to the

larger cities like Havana. Throughout the majority of the conflict, the University of Havana continued to receive funding from the Spanish, and as such continued to pay its professorship. The traditional hiring authority of the University, the Rector, made all hiring decisions. The inflated number of professors employed at the University in 1898 appears to be the result of the war conditions outside of the Capital. However, despite the large number of professors on staff, so bad were they, and the level of instruction they offered, according to Varona, that:

Not a single work can be mentioned as having been written by them, except some compilation without criticism, and they can not be credited with original work of any kind. Most of them look upon themselves as privileged officeholders, members of an irresponsible bureaucracy. Some lived in Spain, and were substituted by assistant's, drawing, however, their salaries with due regularity; other enjoyed practically limitless leaves of absence. (Wood, 1901a, p. 57)

Having decided that a restructuring of the faculty and the University was needed in order to improve the educative practice, Varona consulted with Wood and then planned an attack. He first chose to challenge the professors to enroll more students at the University. This was met with a tepid response by the University faculty. Varona's initial step was taken under the authority of Civil Order No. 207 dated May 19, 1900. In this official order, Varona stated that due to the low student enrollment, and with the view that future enrollment would not occur soon, any professor who was not teaching at least five students was to be suspended from the University and his privileges were also to be abridged (Wood, 1900f, p. 370). While this order should have given pause to several of the professors urging them into action, especially in the College of Letters where seven students were being instructed by fifteen professors, matriculation at the University did not increase to any measureable extent (Wood, 1900f).

Not willing to wait very long for results, Varona drafted a plan for the University of Havana that completely restructured the Colleges and reduced the number of chairs and professors. Released under Civil Order No. 266 on June 30, 1900, the regulation was designed to eliminate all of the professors on the Faculty of the University and then replace only those that were needed using a competitive examination process. This course of action was taken, according to Varona, “to place the University of Havana upon a sound and stable foundation, sufficiently provided with professors and instructors for the efficient conduct of the necessary instruction” (Wood, 1900f, p, 548). In the restructuring process the University retained only three Faculties, those of Letters and Sciences, Medicine and Pharmacy, and the College of Law (Wood, 1900f). A total of 12 Schools were contained within the reformed faculties which were presided over by the professors and an elected Dean. Surprisingly, considering Varona’s rebuke of the earlier Civil Order No. 76 that restructured the School of the Arts in Havana, few limitations were given to the new faculties other than the length of the school year. Varona’s brief instruction in the regulation gave a great deal of opportunity to the professors to adapt the College and expand as needed, much more so than at any time in the history of the University. He declared:

The Faculty shall freely regulate the order of instruction of its different Schools, distribute and subdivide the courses, appoint periods for vacations and examinations, and recommend the reform, extension of studies, increase of courses, addition of Chairs and Laboratories, which the growth of the school may demand, without further limitations than the following: The complete course of the University must last nine months within the year. (Wood, 1900f, p. 550)

For each of the Colleges and Courses of Study, Varona set down specific coursework and a managerial structure that had to be followed. Much of the resistance that was developed to his new plan for the University came from the extensive list of courses that are included in the Civil Order and the requirement of a competitive process for the newly opened positions that included examinations (Wood, 1900f).

Absent from his suggested coursework were the study of Greek and Latin, both of which had been requirements for graduation under the previous structure. Varona's ideological focus on positivism encouraged the introduction of scientific methods and logic to the practice of teaching. To this end his course structure treated theoretical coursework with less importance than practical knowledge. Not very well liked by the professors at the University for obvious reasons; his process of pruning out the decay allowed the University to return in a stronger form within a few short years.

Varona's second area of proposed reform was in the secondary schools of the island. Disappointed with the results of Frye's Military Order No. 226 from December 6, 1899, that encouraged the rapid growth of schools on the island, Varona began to develop a replacement structure that would incorporate many of his ideas for reform. Referencing the proposed areas of attention in his annual report, he was openly critical of Frye's work stating that due to the rapidity experienced in the creation of schools, "little discrimination could be exercised in the selection of teachers" although, despite their inexperience many of the teachers had shown remarkable interest and ability (Wood, 1900f, p. 59). However, the most pressing problem he had with Military Order No. 226 was the centralization of authority in one individual, the Superintendent of Schools. Concerned that under the present organizational structure the Superintendent had the sole authority to:

...organize, direct, and inspect all the schools of Cuba; he drew up the scheme of studies, decided upon the form and conditions of the examinations, recommended the text books and school material, and finally form the school census of the island, gathering all the data related to schools and their cost, the population of schools, school age, the school attendance, and the teachers. (Wood, 1900f, p. 58)

Varona sought to decentralize the decision making process by pulling that process across to the office of the Secretary of Public Instruction and pushing many of the other choices down to the local level.

Having been placed in a department that had seen a great deal of change in leadership and outright tension between the Governor-General and the Superintendent of Schools, Varona entered his job with a focused agenda. His initial camaraderie with Frye appeared to have weakened considerably by the time his Annual Report was written in early September of 1900. The friction that had developed between the two men was apparent in Varona's Annual Report dated September 14, 1900, where Varona alluded to poorly written school laws and a certain amount of mismanagement of the regulations (Wood, 1901a). However, it was the lack of communication that had apparently caused the greatest amount of frustration for the Secretary. Varona stated that despite the reconstruction of the office of Superintendent of Schools the Secretary of Public Instruction was unaware of what was occurring in the schools of the island. The failure in communication alluded to here by Varona may not be entirely due to Frye since the regulation that created his position under Governor-General Brooke left the reporting process very ambiguous. With the placement of Varona in the Secretary position of the Department, Frye continued to act as he had before, with complete autonomy.

Varona's vision of the education system of Cuba relied primarily on the restructuring of the two higher levels, the university and the *Institutos de segunda enseñanza*. The two plans that he discussed with Governor-General Wood on May 13, and June 13, were integrated aspects of a one grand design to enhance the "riches, culture, and morality" of the people of Cuba (Wood, 1901a, p. 62). In order for his vision to materialize, both plans had to be enacted. Varona stated that in his "opinion these require that all our educational work should rest upon strictly scientific basis, in order that it be objective, experimental, and practical" (p. 62). To meet his goal of a new and aggressive style of teaching, Varona decided that the older methods of matriculation and instruction had to be changed.

Recognizing that the students who entered the universities need to be adequately prepared, Varona focused on four interrelated areas associated with the institutes. The first was to set the age of admittance to *segunda enseñanza* at fourteen years of age (Wood, 1901a). This was done to ensure that the student had adequate preparation in the primary studies. Under the prior system, parents had been pushing to get their sons entered into the schools at earlier and earlier ages, with little chance of true success. His second area of interest was the removal from the coursework of those classes of a "purely theoretical character" which serve no purpose other than "mnemonic gymnastics" (Wood, 1901a, p. 63). The challenge Varona faced here was not just the extraction of theoretical classes but also the introduction of modern teaching methods that encouraged experimentation, and a change in student learning practices that utilized the benefits of this open style of teaching. Third in his list of challenges was the introduction of "a new scheme of examinations which will demonstrate that all the mental faculties have been called into play" (Wood, 1901a, p. 63). In order to introduce these last two aspects, Varona realized that he would need a highly trained and dedicated faculty. Economy became Varona's

fourth challenge and also one of his better successes under the new plans. Professors had been removed from all of the institutes under José Lanuza, with the exception of those previously reopened and partially re-staffed in Santa Clara, Puerto Príncipe, Santiago de Cuba, and Pinar del Rio. Fortunately for Varona, most of the professorships in these institutes had yet to be filled. The reduction in salaries at the Institute of Havana of almost \$16,500, provided an additional benefit for Varona and allowed for an increase in the amount of money available for “scientific apparatus, without which objective and experimental instruction become of little value” (p. 63). Varona also ordered that any money saved in the process of reorganizing the system of teaching and not used for the purpose of improving the classroom facilities was to be utilized for the development of libraries, laboratories, and museums at the schools (Wood, 1901a).

Continuing on the discussion related to authorship of the *segunda enseñanza* coursework began above in Question 1 in the section referring to Civil Order 279, it appears that this regulation may be a collaborative effort based on the following aspects that have emerged during the collection of data for this and the subsequent section on Hanna. First, Varona stated that he approached Wood on May 13, 1900 to specifically discuss the development of a plan for *segunda enseñanza* and that he provided the General with a completed plan on June 30, 1900. Second, both Varona’s *segunda enseñanza* regulation and Hanna’s school law published under Civil Order No. 279 lists the coursework in the same manner and order. The two Civil Orders, No. 267 and No. 279, are both included in the Annual Report with the same release date, June 30, 1900. It appears that Varona drafted the section on coursework for the high schools which Hanna then incorporated into the school law. Third, are Varona’s discussions of how the courses were grouped together and the development of the “area of specialty” that each professor was assigned, something that existed in both regulations. Fourth, Civil Order 279 was said by

General Wood to be almost an exact copy of the Ohio School Law, and, Hanna, much more so than Varona, would be familiar with that series of regulations. Although Varona does attribute the School Law incorporated in Civil Order No. 279 directly to Hanna in his pamphlet titled *La instrucción pública en Cuba: Su pasado – su presente* (“Public instruction in Cuba: Its past --- its present”) (Varona, 1901, p. 20). I argue that he is referring to the entire law in that section and not specifically to the work on *segunda enseñanza*. Finally, the majority of the regulation that relates to commissioners and the school superintendents are based on positions that would be commonly found in the U.S., but were not found in Cuba prior to the U.S. intervention; I would attribute this section to Hanna. Based on this information, it appears that the two men wrote separate portions of the regulation and then blended them together for the school law released under Civil Order No. 279 with both taking credit for the final work.

Varona’s work on the reorganization of the University is by his own admission “extensive and arduous” (Wood, 1901a, p. 63). In reconstructing the University he looked to the systems already in use in the U.S, Germany, and Switzerland to examine the placement of the different faculties of the University. From this observation, he created three faculties: Letters and Sciences, Medicine and Pharmacy, and Law (Wood, 1901a). With economy as his guide, he consolidated the numerous schools of the University into just twelve, adding a chair in Education to the Arts and Sciences Faculty upon the urging of *Doctora* María Luisa Dolz (1854-1928).

In order to provide better opportunity to students and to ensure that the best possible professors were selected to teach at the University, Varona introduced three innovative reforms to the new system. The first was open matriculation. By allowing a student of the University to take classes in any area that they might be interested, Varona believed that he was allowing the student to experience areas that were of interest to them personally. Second on his short list of

innovations was the hiring of practicing physicians to teach students on a fee basis. He attributes this process to one that was in use in German, Swiss, and Italian universities (Wood, 1901a). His third, and perhaps most effective in the restructuring effort, innovative change was in the hiring of professors. Under his new system, professors were to be hired based on a two part process. First, candidates for any faculty position were to be examined initially based on their “reputation and known merits” (Wood, 1901a, p. 65). Second, the aspiring professor was required to demonstrate his competency based on examination. This process was one that according to Varona “is practically the same adopted in the university of Paris in the selection of professors” (p. 65). Due to his parsimony in the construction of the new University structure Varona stated that over \$42,370 was saved through the repositioning of the Faculties and Schools and the hiring practices he employed (p. 65).

One problem that Varona had foreseen was the difficulty that many students would have in preparing for the new entrance requirements at the University level. Civil Order No. 267 also contained a provision that established a preparatory course in the institutes of the island. Designed to last for two years, the preparatory course was designed to assist those students who had missed up to two years of high school during the war. On February 1, 1902 the provision of the preparatory course in the *segunda enseñanzas* was extended through the end of the 1903-1904 school year under Civil Order No. 28 (Wood, 1902, p. 48). In his report dated November 1st, 1907, Lincoln de Zayas stated that his program was still underway with little opportunity for it to end without a restructuring of the existing high school program of study (MaGoon, 1908).

The plan of education for the *segunda enseñanza* enacted under Civil Order No. 279 eventually became known as the Varona Plan and was in operation in the public schools of Cuba

up through the 1940s. The plan established a four year program in alignment with high schools in the U.S. to prepare students who had successfully completed Primary and Elementary schools in their pursuit of a college education. In the 1940s a new five year plan (*Plan de Remos*, named after the then Superintendent of Schools) was instituted to further prepare a population that was slowly sinking back to the level of literacy not seen since the end of the War of Independence.

As the school year of 1900-1901 began to wind down and the Constitutional Convention was monopolizing the time of every politician and intellectual on the island of Cuba, José Varona shifted his time more and more from the work of restructuring the schools of Cuba to the work of building a nation. Having taken the position of Vice President of the Convention, Varona chose to give scant attention to many of his responsibilities as the Secretary of Public Instruction. Varona's report from July 18, 1901 speaks to the lack of attention he had spent on the school system while he was working on developing the new constitution for Cuba:

The most important task, therefore, for the undersigned Secretary, during the period embraced by this report, has been to carefully watch over the unfolding of the plan for the reform, trying to ascertain in what spirit it is interpreted by the professors, and taking care that they may not be in want of elements for practical instruction, on which the fundamental change we have tried to introduce in our superior studies is based. (Wood, 1901c, p. 3)

Having left an indelible mark on the structure of the University and the coursework of the high schools of Cuba, Varona moved on to the task of helping craft a new nation.

Matthew Hanna: Commissioner of Public Education 1900-1901

Oftentimes in history there are less noteworthy players who have an integral part in the overall event, but are often forgotten in the retelling. Lieutenant Matthew Hanna is one such

player. While Alexis Everett Frye has held the spotlight regarding the schools of Cuba for almost a century, it was Hanna who did the majority of the work that restructured the education system on the island. Time and again Hanna was selected by General Wood to correct some flaw in the existing school regulation, or draft an entirely new series of school law. Each time he was asked to rise to the occasion and produce the needed product, he delivered. Although somewhat reserved in his initial reports, Hanna became much more assertive by the time he assumed control over the office of Commissioner of Public Schools. Some of his more interesting work in Cuba included the second major school law on the island under the U.S., Civil Order No. 279, dated June 30, 1900, and Civil Order No. 368, released on August 1, 1900 (Wood, 1900f). These two orders established the management structure of the school system of Cuba and were modeled upon the Ohio State School Law of 1880 (Wood, 1900f).

Arriving on June 20, 1898, with the bulk of the expeditionary force, Hanna, who was an Aide de Camp of Leonard Wood, began his time in Cuba as a member of the staff of the General in Santiago de Cuba. Approximately one year prior, Hanna had graduated from West Point and joined the 4th Cavalry as a 2nd Lieutenant assigned to Troop M (Army Navy Journal, July 31, 1897). Prior to joining the military, Hanna had worked as a school teacher for four years in Ohio. His eclectic skillset was in the right place at the right time to aid in the development by the U.S. of the public schools on the island in 1898. Hanna began his time in Cuba inauspiciously, not appearing in official correspondence from the island until September 10, 1900 when General Leonard Wood included him in his Annual Report giving him praise for “valuable and efficient services as Engineer in charge of Road Construction, Department of Santiago: Ordinance Officer of the Department and later for efficient and valuable services in the reorganization of schools of the island” (Wood, 1900g, p. 10).

Although Hanna's early service to the island of Cuba is interesting, the work that he performed in reshaping the school system of the island holds the most importance for this study. While both Lanuza and Varona performed exceptional service to Cuba during their tenure in office for the U.S. occupation government, neither left behind much work product or detailed reports that fully explain the purpose behind and obstacles encountered during the implementation of the various regulation enacted for the schools of Cuba. Hanna, on the other hand, left behind several very copious reports that detail the thought process behind the implementation and correction of the school laws. To fully examine Hanna's impact on the Cuban schools a review of his school law accompanied by commentary included in his Annual Reports will provide the clarity needed.

Hanna's first Annual Report is dated February 22, 1901, published less than three months following his assumption of the office of the Commissioner of Public Schools. He had been appointed to this position following the illness of Dr. Estaban Borrero Echevarría. Dr. Echevarría was named the Commissioner of Public Schools on September 14, 1900, under Civil Order No. 361. Previously Echevarría had been appointed to the position of Sub-Superintendent of Public Schools during the early months of Wood's term as Governor-General (Wood, 1900f). Echevarría served as the Commissioner until "severe illness compelled him to abandon the office temporarily of the 8th day of December, 1900" (Wood, 1901a, p. 100). Initially enamored with his first Commissioner of Public Schools, Wood's estimation of him had soured by January of 1901, when in a letter to Elihu Root dated, January 8, 1901, Wood decried the mismanagement of the office he had recently vacated: "The Commissioner is fortunately sick and Mr. Hanna is in charge of the office – has been for three weeks-. He found correspondence months behind and a thousand letters unanswered" (Wood, 1901b). This opportunity for Hanna opened a door to the

management of the schools on the island for General Wood during the remaining eighteen months of U.S. Occupation. Rather than appointing another Cuban to the position of Commissioner, Wood retained Hanna, first as a temporary replacement, and then as the permanent Commissioner. Hanna remained the head of the office of Commissioner of Public Schools until he was relieved on May 17, 1902 under Civil Order No. 150, published May 13, 1900, and replaced by Mr. Eduardo Yero y Buduén (Wood, 1902).

The office of the Commissioner of Schools, according to Hanna, was created under Civil Order No. 279, dated June 30, 1900, for the purpose of managing the reorganization of the schools on the island under the new school law (Wood, 1901a). Facing what appeared to be totally unregulated growth in the number of Primary schools on the island in the first three months of 1900, Wood had, on March 3, 1900, shutdown a provision of Civil Order No. 226 that allotted fifty dollars for the purchase of classroom furniture in new schools (Wood, 1901a). While Frye reacted to the restriction on the expansion of schools by Wood with peevish behavior; Hanna, following Wood's orders, took charge of the redrafting effort and produced a new school law in short order. As Frye's esteem in the eyes of Wood was falling in the middle of 1900, Hanna's had taken a decidedly different direction.

Hanna suggested to Governor-General Wood that the original school law (No. 226) was no longer serving the needs of the schools on the island since it was written when there were but 312 schoolrooms (Wood, 1901a). Wood was amenable to the introduction of a new school law that encouraged and strictly regulated the enumeration of schools activities and attendance while at the same time controlling the distribution of supplies and funds to the different municipal facilities. The explosion of activity that followed the publishing of that original order had led to unprecedented growth in the number of new schools; according to Hanna, the existing school

law was not designed to manage that many locations (Wood, 1901a). Another factor that Hanna cited was the lack of “territorial division” of the island for schools (Wood, 1901a, p. 98). Most of the island at that time was structured under municipal districts for school management.

Adding to these problems were the lack of school textbooks, no course of study was in use, and as stated by Hanna, “there was not, to my knowledge, a single public school building of primary grade that was the property of the state” (p. 98). Other difficulties that the Lieutenant encountered were the absence of a structured system of reports and poor detail regarding school activities and accounting of funds disbursed. To overcome these and other problems with the existing school law, Civil Order No. 279 was written.

Recognizing that a manager of the school system was needed, Hanna began his research by examining the Ohio School Law that he was familiar with from his time teaching in that state. What resulted from this extensive reorganization of the school management structure is Civil Order No. 279, discussed in detail above, and Civil Order No. 368, published August 1, 1900, discussed by Hanna below in his Annual Report as the Acting Commissioner of Public Schools. The Ohio school law that was in effect at that time, was one in force in 1896 and put into place in 1897(Corson, 1897). However, Hanna does not just develop the school law for Cuba by taking it lock-stock-and-barrel from the existing 1897 regulation in Ohio. Instead it appears that he selected sections of different versions of the various laws in effect from 1853 through 1897; moving them around in his regulation to suit the importance he believed was necessary. The crafting of the school law in this manner points to Hanna’s belief in his ability to create his own vision of what the school law should include. One example of this reconstruction process was the office of the Commissioner of Public Schools. This position leads off Civil Order No. 279 as a means of establishing the executive structure for the school law prior to the development of

other regulation. However, the Commissioner position was first established in the Ohio School Law of 1853, and only appears as existing legislation, in later versions, that follow typically near the end of the regulations (Trevitt, 1853; DeWolf, 1883; Corson, 1897). The placement of this regulation at the very beginning of Civil Order No. 279 indicates the importance that Hanna believed it held for the successful implementation of the new regulation in Cuba.

The division into districts for ease of management was the second main section of Civil Order No. 279. This provision initially emerged in the first section of the 1883 version of Ohio's regulations and was repeated at the beginning of the 1897 publishing of the school law in force (DeWolf, 1883; Corson, 1897). As Ohio grew over the decades from the 1850's through the 1880's the development of districts was utilized to ease the reporting process for the individual school boards and to direct the decision making processes to the local level. In contrast, Hanna's school law and several of its modifications redirect the local power and decision making back to a central authority. An observation by Hanna in his Annual Report from 1900 points out the constructed and deconstructed nature of the Cuban school law developed in May of 1900:

The order is an adaptation of the school laws of the State of Ohio to the conditions existing in the island of Cuba. So different, however, were these conditions from those existing in the State of Ohio that in many of its provisions the order has lost all similarity to the law after which it was modeled. (Wood, 1901a, p. 98)

Some changes that were required were adaptations of language describing the divisions, townships and villages for Ohio, and city districts of the second class and municipal districts for Cuba. Cuba's sub-districts are broken down by barrios, whereas the Ohio sub-districts are by sections of township districts.

Another major difference in the Cuban version of the school law was the simplification of the regulations for the Municipal districts. In the Ohio law, the divisions are established as a means of classification of population with all divisions required to follow the same law regardless of size, with some minor modifications. In Cuba there appears to be a more disturbing reason for the adaptation of the law. Describing the purpose of the modification of the laws for the Municipal districts in Cuba Hanna stated:

Realizing that it is in the municipal districts where perhaps the lowest grade of intelligence is encountered, and that it would be most difficult to enforce the law, due to inability rather than any desire to avoid its provisions, that part of the law pertaining to municipal districts was made very explicit and simple, and is accompanied by models, forms, etc., which are of great assistance to the school officers in municipal districts in the enforcement of the law. (Wood, 1901a, p. 99)

Hanna's perception of the members of the municipal district's intellectual ability appears to have been based upon the passive resistance that was underway in the small towns and villages across the island in response to various regulations proposing schools and or improvements to existing schools under Military Order No. 226. One example of this was the difficulty many Town Councils were having with the required reporting under Military Order No. 226. A second was the response from the School Inspectors who travelled across the island attempting to explain the new regulations to the Municipal authorities who were not accustomed to the new reports (Wood, 1901a). One specific component that the local authorities resisted against was the imposition of penalties for false reports made by teachers or local school board members.

By 1883, the recognition in Ohio that a chief executive was necessary caused a change in the reporting structure. Hanna, observing similar conditions in Cuba, decided to establish the

executive position at the very beginning of the school law and then build the three tiered districts below the Commissioner. City Districts of the First Class on the island were defined as those “having a population of thirty thousand or more” (Wood, 1900f, p. 629). The population range for City Districts of the Second Class was between ten thousand and less than thirty thousand. The maligned Municipal Districts were all of those districts remaining on the island that did not fit into the population limits as defined in the first two divisions of the law. In an article written for *The Atlantic Monthly* June 1902 edition, Hanna described the number of school districts of each type that had been created under the new law. Listing the districts in reverse order from that in the school law he stated that “there were 121 of the first, nine of the second, and five of the third” (Hanna, 1902b, p. 739). The five cities of the First Class were defined as “Havana, Santiago, Mantanzas, Cienfuegos and Puerto Príncipe” (Wood, 1900f, p. 629). Cities of the Second Class included “Cárdenas, Manzanillo, Guanabacoa, Santa Clara, Sancti Spíritus, Regla, Trinidad and Sagua la Grande” (p.629). The remaining schools on the island, well in excess of 3,300 schools were of the lowest level, and consequently assigned the simplest regulations for management based on Hanna’s perception of the abilities of Boards of Education of these regions.

True to his ordered military background, Lieutenant Hanna included a detailed series of reports in the new school law. Each of these reports, whether they began with the teacher in a classroom or a District Commissioner, was intended to rise up to the island’s Commissioner of Public Schools (Wood, 1901a). This centralization of the reporting process was somewhat similar to that of Ohio, however in Ohio; the control was maintained more with local boards of education than a centralized office (DeWolf, 1897). The purpose of these reports was to enumerate attendance, identify truancy, and to acknowledge educational attainment of the

students (Wood, 1901a). In the event that a teacher or District representative failed to produce a report in a timely manner, or if they falsified a report, penalties were included in the regulation (Wood, 1901a). This was very similar to the existing law in Ohio, where it was an accepted aspect of the school law. In Cuba however, the teachers were very much against the imposition of monetary penalties if they were found to have violated this provision.

In order to introduce the majority of the new school law, Hanna stated that it was first necessary to construct the local boards of education in the 124 districts across the island. One difficult component of holding elections in the different municipal districts was the lack of firm territorial boundaries. Due to a lack of records and the often overlap of villages and towns in the countryside of Cuba, the delineation of the municipalities into districts for school administration was a difficult endeavor (Wood, 1901a; Hanna, 1902b). In Hanna's Atlantic Monthly article he described the difficulty of introducing a school law as being one that "appeared to be well nigh insurmountable" (Hanna, 1902b, p. 740). However, within six months of the introduction of Civil Order No. 279, over 1000 elections had been held across the island without any major charges or irregularities allowing for a somewhat smooth introduction of the remaining provisions of the new law (Wood, 1901a).

Due to the fact that a Commissioner of Public Schools had yet to be appointed by the Governor-General, Hanna arranged to hire four Cuban educators to travel the countryside. The responsibility of these men was to introduce the law's requirements to the local town councils and mayors and then returning a few weeks later to review the changes and reinforce the provisions of the law (Wood, 1901a). Up to this point, Hanna described the introduction of the new school law from his perspective. Little voice had been given to the reaction that the teachers of the island had to the introduction of the new regulations. Since they had not been a part of the

development process, nor had they any say in the methods of introduction or reporting requirements, opposition quickly mounted amongst the island's educators to the new school law. As an example of the opposition and general resistance by the teachers and other officials, Hanna includes in his report the opinion of a provincial superintendent of Pinar de Rio.

In my opinion the reason for such an opposition was not only because, on account of the knowledge already acquired of order No. 226, both the teachers and the boards of education knew how to perform their duties, but because all of them found it complicated and were afraid that it did not protect their interests nor further those of public education. Following these inspirations, the newspapers criticized it in general terms without making, as they should have done, a minute examination into it, pointing out its errors and defects. (Wood, 1901a, p. 164)

In addition to the opposition from the teachers, Hanna asserts that a more general resistance emerged during a modification to the law in September of 1900 that repositioned the control over the leadership of the Boards of Education across Cuba. Under Military Order No. 226, the *alcaldes* had been the local leaders of the Boards of Education in each Municipal District. Under Civil Order No. 310, published on August 9, 1900, section 27 of Civil Order No. 279 was amended to replace the *alcalde* as the President of the Board of Education in the Municipalities with an elected President (Wood, 1900f, p. 692). So great was the resistance to this change, according to Hanna, that the U.S. Occupation Government had to hire inspectors to enforce its provisions and ensure proper reporting was underway across the island (Wood, 1901a).

In an overt expression of hubris, Lieutenant Hanna defended his school law as regulation where "Everything is foreseen; everything tends to the betterment of public instruction" (Wood,

1901a, p. 102). He supported this assertion with a listing of the areas that the law affected, from the collection of data through to the creation of a chief executive officer in the office of the Commissioner of Public Schools. Retreating slightly from his lofty perch, Hanna closed his discussion of the new school law with a convoluted, third person, self-assessment of the final version of the law:

The undersigned, in formulating this opinion of the present school law, does not deny that it contains defects which should be remedied, and he has already called to the attention of the commissioner of public schools certain points which in practice he finds are not giving the praiseworthy results which said officer proposed it should give when he recommended said law to the military governor. (Wood, 1901a, p. 102)

In contrast to the beginning of this report and the later article in *The Atlantic Monthly*, Hanna's closing remarks regarding Civil Order Nos. 279 and 368 make the Lieutenant appear pretentious and self-important regarding the development and introduction of the school law of Cuba and its modifications. Coupled with his disparaging remarks related to the Cuban people and the level of intellectual ability on the island, Hanna does not appear as someone in support of Cuban independence.

Regardless of his actions following the introduction of the school law in Cuba and his personal perspective of the people of Cuba, Lieutenant Hanna was able, in a little over four months, to accomplish much more than Alexis Frye had during twice the time. Hanna agreed with this assessment asserting in the post script to his annual report that "It can be stated without doubt that more has been accomplished for the improvement of the condition of the schools in the first four months of this year than during any other period of equal length since their organization" (Wood, 1901a, p. 117).

Frye's drift from a supporter of U.S. interests of annexation to being in support of Cuban independence marked him for Governor-General Wood as someone who could not be trusted. Hanna, on the other hand, had supported the aims of Wood and subsequently rose to a level of high importance in the island's schools. As the acting, and eventually, Commissioner of Public Schools on the island he was in charge of many aspects of the management of the Cuban school system and controlled the flow of materials and money for schools throughout the island. While the Superintendent of Schools, Alexis Frye, had his power slowly diminished through the creation of Sub-Superintendents, a Board of Island Superintendents, and the eventual retraction of the executive power from the office, Wood slowly crafted an alternative process that placed the control over the island's schools under his authority. Lanuza, Frye, and Varona were all civilian appointees of Wood, and thus subject to dismissal, Hanna, on the other hand, was a loyal subordinate enlisted in the military. Hanna's military position allowed Wood much greater control over the direction of the office of Commissioner of Public Schools than he had experienced under his earlier choice. Despite the creation of a series of school laws under his predecessor, General Brooke, Wood crafted a series of political campaigns and regulations that first placed him at the helm of the island, and then allowed him total control over the island's schools. By the end of his tenure in Cuba, Lieutenant Hanna had begun to sound more like his superior in the reports he presented for annual review.

In early 1902, Matthew Hanna published his second Annual Report, this time as the Commissioner of Public Schools. After a brief summary of the history of education on the island, Hanna presented a summary of his accomplishments during the 1900-1901 school year. His first concern was with the abilities of the teachers currently in the classrooms across Cuba. Asserting that many were poorly trained and due to a lack of regulation it was unclear which

teachers were performing well and which should not be in the classroom. Despite the voyage to Cambridge for 1273 teachers, professors, and chaperones, arranged by Alexis Frye when he was the Superintendent of Schools for the island of Cuba, Hanna stated that “Up to September, 1900, the public schools of the island had had practically no technical supervision” (Hanna, 1902a, p. 16). While acknowledging that inspections for attendance and sanitary reasons had been ongoing, nothing was being done “whatever for correcting the abuses arising from the faulty character of the instruction given by teachers” (p. 16). In order to correct this problem the Commissioner of Public Schools decided that the development of Normal Schools on the island would be prohibitively expensive. To resolve the issue of needed instruction and lack of facilities, an arrangement was made with the New Paltz Normal School of New Paltz, NY (p. 18). Sixty Cuban women were sent to the school for a two year program of studies paid for by the Island’s treasury. Additional provisions were made for male teachers to attend four schools in Connecticut, but at the time of the publishing of his report they had not been finalized (Hanna, 1902a).

Enrollment and attendance had increased markedly during the previous year under Hanna’s management. Whether the number of pupils counted as matriculated and attending the schools in Cuba had risen dramatically, or the method of enumeration was providing a more accurate assessment, Hanna does not say. He does estimate the then current population of the island at “one million five hundred thousand inhabitants” and stated that out of the 254,000 different children enrolled in the schools, “135,000 have been regularly in attendance” (Hanna, 1902a, p. 16). Calculating the number of enrolled students as 11% of the total population, Hanna asserted that the levels of illiteracy prevalent at the end of the War that approached 56% would soon be eradicated.

According to Hanna in 1902, the Boards of Education on the island were better educated in their responsibilities following a year of local school management. Their administration of the schools had greatly improved and was continuing to get better. One issue that was constantly a problem for the Commissioner was the high number of letters from citizens who felt aggrieved due to some misunderstanding either on their part, or on the part of the Boards of Education. Hanna blames this problem on the democratic nature of the school law stating that it is the lack of understanding of the new processes and a habitual response engrained during decades under the control of the Spanish Captains General that was causing the letters to arrive in his office (Hanna, 1902). The method of eventually rectifying this problem, according to Hanna, was for the people of the school district to elect a more competent Board of Education in their district (Hanna, 1902).

In the area of teacher pay during the year of 1901, adjustments were made to paragraph 76 in Civil Order No. 279/368. The modification was done to normalize pay throughout the island and to avoid the problems associated with average attendance figures that could affect a teacher's salary from month to month. Hanna had an interesting take on this problem and the results of the solution. The salaries under the earlier law were driven by location and the average number of students in attendance during a months' time. Under the original wording, teachers were to be paid according to the level of the school in which they were employed. For example if a teacher worked in a Municipal school, and the school was a complete school, and if their daily attendance remained at an average level that maintained the complete school status, then the teacher would receive \$50.00 per month. If a teacher's average attendance dropped below the minimum for a complete school, the teacher's salary would drop to \$30.00 for that month (Hanna, 1902). For Hanna this temptation to falsify attendance records was too much of a

temptation for Cuban teachers and needed to be changed. The new regulation dropped the attendance requirement and added in a proviso to pay higher rates for teachers who acted as Principals managing two or more schools. Hanna's comments regarding the reason for the change speak to the growing body of evidence that describes his perspective of the Cuban people:

In practice it was found that this provision of the old paragraph 76 gave most pernicious results. To grade the salary of the teacher in accordance with the average daily attendance of pupils in that teacher's schoolroom was, to say the least, placing a premium on a false statement, and while it is hoped that no such results were ever really had from the enforcement of the paragraph, it was certainly unwise to continue to leave this temptation before the teachers of the island. (Hanna, 1902, p. 21-22)

After a year and several months of service in the Commissioner of Public Schools' office, Hanna appeared to have developed a very low view of the teachers of Cuba. The use of the word pernicious, meaning a subtle harmful effect according to the Merriam Webster online dictionary, presents the intent of deceit in the reporting of attendance by the teachers. Although Hanna stated that he hoped that this had not occurred the tone of the paragraph was colored by the use of the qualifying adjective. An additional change in the wording of the regulation was not discussed by Hanna in his commentary, but was evident to the members of the Boards of Education on the island. Inserted near the bottom of the new paragraph was wording that allowed the Commissioner of Public Schools to dismiss with or without cause "any appointee of any Board of Education" when it became necessary for economy or if it was in the public service (Hanna, 1902, p. 21). In this section Hanna gave little credence to the concept of democratic nature implied in the preceding section.

Several additional small and relatively insignificant changes were made in other areas of the school law with the one most pronounced in the organization of the school districts into First, Second and Municipal classes. According to Hanna, at the time his report was written, Havana was the only city remaining on the island that needed the designation of a District of the First Class. The reason behind this was the advancement of the infrastructure across the island and the lack of need in further development of the executive management capabilities for the other four cities originally named to this category. Havana was to remain a City District of the First Class with the remaining four, Santiago, Mantanzas, Cienfuegos and Puerto Príncipe, dropping to City Districts of the Second Class (Hanna, 1902).

The remainder of Hanna's Annual Report commentary was a compendium of data relating to attendance, number of schools, classrooms, and teachers. In addition there were sections that described the number of schoolbooks distributed, furniture delivered to schools, and school supplies dispersed. Sections on summer Normal Schools and teacher examinations bookend contract requirements that limit teacher employment to one year at a time (Hanna, 1902). The hiring and retention of good teachers according to Hanna lay in the honesty of the Boards of Education. The Commissioner of Public Schools instructed parents to vote for men who will put the interests of the children of the district before their own. Further remonstrating the parents he stated the following: "If the Board is careless, ignorant, or corrupt, the teacher may be worthless; money is wasted and the child's education neglected" (Hanna, 1902, p. 45). In a final two paragraphs of this section, that sound more like a lecture than the reporting of information, Hanna tells parents that only two reasons exist for the hiring of bad teachers, "cowardice or corruption – equally worthy of contempt" (p. 45). Although Lieutenant Matthew Hanna was by all accounts an excellent executive and worthy statistician, his, at times,

deleterious language, was harmful to the acceptance of the well written and carefully thought out regulations of the School Plan he developed.

Summary and preliminary discussion of Question 2

Of the six men discussed in detail above, four were from the U.S. and two were native-born Cubans. The two Cuban men, José Varona and José Antonio Gonzales Lanuza, had spent considerable time in the U.S. during the Cuban War of Independence. In addition it can be clearly stated that both were also members of the independence movement from the beginning. The four U.S. individuals cannot be politically categorized as easily. General Brooke, a long-term regular Army officer, had few political ambitions and was disgusted by personal ambition in fellow officers. Leonard Wood and his subordinate Matthew Hanna could be counted as clear proponents of annexation. Alexis Frye is the one enigma of the U.S. contingent. Raised in a family where progressive politics was predominant, he entered the service of the U.S. Government with the desire to fight the Spanish in the Philippines. Once in Cuba, Frye slowly adopted the beliefs of the Cuban people and became a strong supporter of Cuban independence. Although he arrived with the same level of hubris as many other U.S. citizens, his close relationships with the teachers of Cuba, especially during the trip to Harvard, drew him closer to the politics of Cuban independence, allowing Frye to embrace his sense of Cubanness. So enamored was Frye with the Cuban people that he fought with a U.S. Navy Quartermaster to protect the honor of the women teachers he was escorting to Cambridge, eventually marrying one of those with whom he made the trip. Frye, it can be argued, had developed what Ortiz (1949) would call *Cubania*, or the desire to be Cuban. While all of these individuals listed above were influential in the development of the school system on the island, it can be said that Cuba influenced all of them to some respect, Alexis Everett Frye to the greatest extent.

Question 3:

Did the U.S. try to influence the Cuba education system after the Cuban War for Independence?

If so, in what ways?

In the months following the conclusion of the Cuban War of Independence, not much official effort was put forth to directly influence the majority of the schools on the island. Due to the several major concerns facing Governor-General Brooke and his Secretary of Justice and Public Instruction José Lanuza, schools on the island were low on the list of immediate priorities. However, shortly after the immediate threat of starvation had passed, individuals across Cuba began to act to influence the education system of the island. The term influence is used here to indicate the events, processes, and actions of individuals that were utilized in an attempt to alter the existing practices of the schools, teachers, or students in the schools of Cuba. Essentially, this question examined the attempts at cultural adjustment using the school as the medium of transmission of new values and mores. I approached the thematic division for this question based upon the surface area cultural aspects of Halls (1967) iceberg model of culture. Surface area items in Halls (1967) model include concepts such as education, laws, holidays, dress, food, and daily patterns. From this perspective the main themes that emerged from the research were adjustments of the length of the school day and school year; the replacement of the existing religious holidays with secular celebrations from the U.S.; the introduction of U.S. textbooks into the Cuban classroom; adaptation of coursework to include English Language and Civics coursework; and the introduction of the School City Program (Gill, 1901).

These themes were coalesced into three areas of research that best identified the influence brought to bear on the Cuban schools system. First, are the changes associated with daily and annual practices such as starting and ending times for the school day, school year, and the

changed holiday schedule; these are examined under the title of structural adaptations. The second area of focus was the use of textbooks from U.S. sources and the introduction of English language and Civics classes designed to Americanize the Cuban schools; which are reviewed in coursework adjustments. Third, is the introduction of the School City by Wilson Gill (1901). This third area is very profound in its nature and is examined in a category to its own in order to analyze the importance of the attempted introduction of a lived civics program in the Cuban schools. Each of these areas was utilized, sometimes with forethought and sometimes without specific intent; however, their use collectively supported a concerted effort to annex the island of Cuba.

As was shown above, many of the U.S. Military Commanders exhibited pro-annexationist positions openly in their published reports and letters. While civilian authorities from the U.S. appear split over the issue, with some, like Alexis Frye, openly and vocally opposed to the taking of the island and the attempted transformation of the Cuban culture by the United States. Native-born Cubans and former Spanish citizens are also openly split over the issue of annexation and independence; with many landowners firmly pro-annexation and most educators and other scholars on the island agitating for independence. The complexity of this one issue is quite convoluted as it includes economic, social and cultural, and broad sovereignty and national security concepts. In addition the allegiance of Cuban intellectuals vacillates from pro annexation to outright independence over the course of half a century. It is in this section of the broader discussion regarding the school system transformation that the concept of *Cubanidad*, as it has been discussed extensively by Ortiz (1949), Pérez-Firmat (1997), and Utset (2011) is most apparent in my examination of these events.

Structural adaptations to the Cuban school system

In the weeks and months following the transfer of governmental control of the island from the Spanish to the U.S., many rapid and profound changes occurred in Cuba. The U.S. Government used their interpretation of the Treaty of Peace signed on December 10th, 1898, in Paris, France, to enact a series of events, laws, and processes that removed any opportunity for control over their own destinies from the hands of the Cuban people. With the firm belief that they had a mandate for control of the island, the U.S. Government began a strategy of the reconstruction of the island. The auspices of the rebuilding effort included every aspect of the island's physical, cultural, and spiritual construction. In an effort to remake the island in the image of the U.S., changes were made in the legal system, monetary system, system of schools, and the system of government.

Under Governor-General John Brooke the first phase of the remodeling effort was begun. In order to secure the island from continued risk of local insurrection, Brooke first had to stabilize the population. He accomplished this through a program of providing food and medicine to the starving and oftentimes very sickly population of the cities and the redeveloping countryside. In the first six months over 6,493,500 rations were distributed along with medicine and medical supplies to the island's few hospitals (Brooke, 1900a.). In order to ensure the safety of the population while a standing army was still in the field, Brooke employed many of the retiring Cuban soldiers in jobs such as police officers in the towns and villages across the island. The eventual disbanding of the Army of Independence only took place following the payment of over 3 million dollars to the ranks of the soldiers and the employment of several high ranking generals of the Cuban army by the U.S. Occupational Government (Brooke, 1900a).

While the four Western Provinces were still in transition, Santiago and Puerto Principe were already in the process of recovering from the war. Brigadier-General Leonard Wood was in command of the City of Santiago de Cuba and had already begun to enact changes to the region under his control by the end of 1898, six months before Brooke had stabilized the remaining parts of the island. One of Wood's first actions, after stabilizing the population's immediate needs, was to develop a school law for his province. Assigning three active U.S. Army officers and one Cuban Army officer to the task, Wood began the crafting of a school law. Within a month the quickly assembled board of Santiago developed a plan to restart the schools in Santiago province (House of Representatives, 1900). Imbedded in the regulations of that law were some of the first official changes to the culture of Cuba under U.S. control.

According to the new plan developed by the impromptu Board of Santiago, the school year was slated to begin on the first Monday of September and scheduled to close for the summer after the annual examinations. Annual examinations were to begin "immediately after the first day of June, and after such examination, the schools shall be closed until the beginning of the next school year" (House of Representatives, 1900, p. 858). Two main vacation periods were slated during the school year with the first slated for two weeks during Christmas and the second lasting for a week at Easter. Schools were to be open for five hours per day, five days a week, being closed on Saturdays and Sundays. The only other holidays allowed for under the plan of instruction were those approved by the provincial council.

In this short section on attendance is hidden a major transformation of the school system as it had been managed under the Spanish. Several fundamental changes were put in place that dramatically changed the school year, holidays, weekends, and the length of the school day. In the School Plan of 1880 the term of the school year was year-round with a short break in the hot

summer months. The holiday schedule followed the Church structure of holy days with the list including the Saint name-days of the King and Queen (House of Representatives, 1900). School under the Spanish was in session on Saturdays as well as the five days of the week; however, classes were often released on Thursday afternoons. The structure that was used in the Board of Santiago School Plan mimicked the annual schedule for schools in North America. The U.S. schedule for the school year had been developed in support of an agrarian economy with summers off from school so that children could assist on the farms. Since the growing season in the Caribbean was year-round, the necessity of a specific period of the year for assistance from children on the farms was not generic to a time of year. Instead, the children were often taken out of school at various times to assist their families with many chores.

One final twist came from the typical school day. The School Plan from the Board of Santiago suggested that the local council would set the times of the day when schools were in session. The change from a structured morning period with a mid-day break at home followed by an afternoon session was transformed under the new suggested plan to a simple five hour day (House of Representatives, 1900). These cultural changes to the structure of the schools were all modeled on the existing system of the U.S. Classes for North American children began about nine in the morning following morning chores. School ended for the day traditionally at three in the afternoon so that students could return home to help with afternoon responsibilities around the farm, the house, or store. Parents and older students as well as teachers and administrators in Cuba were accustomed to a school year that followed the holidays of the Church and the needs of the local economies. The proposed changes took none of these issues under consideration; instead the layering of a new culture was intended to begin with attendance at school under the U.S. model.

Attendance under the board of Santiago's plan of education was mandatory for children from six to fourteen years of age. This modification also required that children attend kindergarten, Primary school at the Elementary Level and also Primary school at the Superior Level. Unless parents could prove that they were providing instruction in their homes equivalent to that provided in the public school, or if the child was attending a private school that met the same conditions, they were to receive the punishment that was currently prescribed by law (House of Representatives, 1900). In essence this meant that the parents could be fined anywhere between two and twenty dollars for each infraction of the law (House of Representatives, 1900). Under the section on attendance the board also included the term of the school year, some holidays, and the amount of time each day there should be instruction.

In the appointments and pay of teachers only a few changes are made away from the school plan of 1880. The changes, however, are monumental in their scope. The first was placing the hiring responsibility with the local council and removing it from the Governor in Havana. The second was much more significant as it introduced a hard and fast barrier between the Church and the school. Under the proposed plan of education from the board at Santiago "No ecclesiastic, no member of a religious fraternity or sisterhood living in a community or withdrawn from secular life, and no person wearing the dress of any religious order, shall be eligible to teach in a public school" (House of Representatives, 1900, p. 858). The requirement that prevented any non-secular person from teaching in a public school was a severe redirection from the past one hundred years of education under the Spanish. During the entirety of the 19th century the Catholic Church had gained more and more control over the curricula of the public schools. So complete was the takeover that priests sat on the local school boards and selected textbooks to be used in the schools (Liras, 1895). They also had authority over who could be

promoted for hiring as a teacher, and most importantly controlled the curriculum of each grade through the insertion of religious courses at every level of the school. The barring of the Church from the education sector proposed under the plan set down by the Board of Santiago had the potential of a major cultural shift.

Under teacher salary a few distinct changes were proposed, again along the lines of school systems in the U.S. Teachers were forbidden from living in the same building in which they taught school, male and female teachers were to receive equal pay for equal work, and most importantly, the teacher's salary could not be augmented from the matriculation fees of the students. Once again, while this was typical of a U.S.-based school system, it was diametrically opposite of the processes permitted under the Spanish.

Two final proposed changes in the system of the schools under this early plan from Santiago was the allowance of coeducation in all schools where the local council approved, and the opening of the schools to all children "without regard to race or color" (House of Representatives, 1900, p. 859). Under the Spanish plans of education, coeducation was only permitted in an incomplete school in towns where separate schools could not be managed, unless the schools were for children who were considered "colored". In those schools there had been no provision to separate the boys and girls. Schools where children of different "races" attended the same classes were a far departure from the system under the Spanish. In addition, public schools in the U.S. were not open to all children at that time; instead, schools for each "race" were constructed in order to maintain the economic separation underway both on the island and in the U.S. This departure from the norm of both regions is groundbreaking in scope especially considering the time period this study is examining. Since this one line at the very end of the

paragraph on coeducation is the only reference to “race” in this plan of education, it is difficult to ascertain what the members of the board intended with this change.

In Captain Samuel Small’s plan of education from the province of Mantanzas, the school age of students was suggested at six to fourteen years due to the earlier maturation of the Cuban children (Small, 1899a). Small did not include discussion relating to a typical school day, holidays, or the school year in his brief school plan, however, an addition that was offered by the Mayor of Cienfuegos included many of these areas. In a letter to General John Bates, Small agrees fully with the suggestions by the Mayor of Cienfuegos, *Señor* Frias, regarding the inclusion of a standard school day and school year (Small, 1899c).

Small’s attempt at reorganization did not get instituted without controversy amongst the people of the town of Cienfuegos. *Señor* José Antonio Frias, *alcalde* of the town, forwarded a letter to Small on March 17th, 1899. Catalogued as File No. 91, Headquarters Department of Santa Clara and titled “*Letter to Supt. Public Instruction relative to school matters with certain recommendations*”, this five-page note responded to Small’s plan of reorganization for the city of Cienfuegos (Frias, 1899). While starting out in support of the proposal that Small had offered, Frias (1899) quickly turned to several issues that are out of step with the cultural expectations of the people of Cienfuegos. First, the *alcalde* requested that the division proposed for the school districts by Small (1899a) were to be adjusted to meet the economic conditions of the city since the more affluent citizens lived in a section of the city that did not send their children to public schools. Since the schools were not needed in this area, *Señor* Frias suggests that the quartering of the city into school districts be adjusted to exclude this area:

The inhabitants occupying the part of the city limited by Vines and Arango Aves., from east to west and Santa Clara and Castillo Streets from North to South belong to the

accommodated class of the town and give a small contribution to the Public Schools while the rest of the city is occupied by the poor class of people and unable to send their children to private schools. (Frias, 1899, p. 2)

The accepted class division was not apparent to Small, perhaps due to his perspective of the people of Cuba as existing all in one economic strata that was inferior to that of their northern neighbors. Frias' second request is to adjust the salaries to acknowledge the loss of the teacher's income relative to the regulation preventing them from occupying the school house as a residence. Pointing out that the salaries paid were based on "an arbitrary scale", he suggested a more equitable distribution to eliminate the discrepancies between the lowest and highest paid teachers (Frias, 1899, p. 3). Third, he suggested that the rent paid for the school houses were to be established at a fixed amount so that the city was able to afford rents for the school houses. In his fourth suggestion, it was clear that the *alcalde* is resisting Small's attempt to wrest the traditional power of teacher appointment away from the Mayors and Town Councils. Frias (1899) recommends that the teachers go before a "committee appointed by the Municipal Council" for their examinations, who would then have the authority to appoint them as teachers (p. 5). Small (1899c) follows the letter from Frias (1899) with a short missive to Major-General Bates accepting the revisions suggested by the Mayor and indicating that as the Superintendent of the Public Schools of the province that the *alcalde* had asked him to manage the adjustment "so as to fully instruct the teachers in its operation for the future" (p. 1).

One specific piece of evidence suggests that Small's (1899a) plan of education for Mantanzas province was then agreed to by the Mayor and the Town Council of Cienfuegos. In a folder designated as File No. 86 and dated April 8, 1899 in the RG 395 series of documents, titled simply "Plan of Re-Organization of the Schools" I uncovered a handwritten plan of

education in Spanish that appears to follow the outline of Small's (1899a) plan of education dated February 25, 1899. In the first section of this plan the four districts as proposed by Small (1899a) are outlined with revisions in red correcting an earlier version of the document. In each of the four districts are listed schools; however, no designation or school name was included in the list. One adjustment exists in each of the school listings as well, although not lined-out in red. Each school listed a Principal and either a *Pasanté* or *Pasanta* (male and female interns) originally. This was changed to assistants in the revision on file.

Article Six contains the brief plan of studies listing only two areas where instruction should be focused. The first course of study was recommended as those courses that are essential for the encouragement of citizenship in the youth. The development of morality especially that of religious obligations to the Church was the second area the plan of studies covered. The age of entry was set at six years of age in Article Seven with no age of exit suggested. Article Twelve stated that the materials needed for the school by the students were to be supplied by the parents, unless the parents were not able to provide the material. The hours of the school were to be eight in the morning until eleven in the morning followed by a break until one in the afternoon. Classes were to end at three in the afternoon (U.S. Army Overseas Operations and Commands, 1899, p. 4). Saturdays were to be a day off from school with Sundays set aside for catechism (U.S. Army Overseas Operations and Commands, 1899). Holidays were established in Article Fifteen as any day decided upon by the Superintendent of Schools, or in this case Captain Small (U.S. Army Overseas Operations and Commands, 1899). An example of the introduction of non-traditional holidays appeared in a Circular dated February 22, 1899 and signed by Captain Small as the Superintendent of Public Instruction. Written in Spanish the Circular was directed to teachers informing them of the celebration of the birthday of

George Washington and instructing teachers that they could release the students in Cienfuegos for the remainder of the day (Small, 1899d).

Article Seventeen had an interesting redaction. The original text read “*La bandera nacional del Gobierno Supremo de Cuba sera enarbolada todos los dias sobre el asta del edificio, menos los dias de lluvia*” (The national flag of the Supreme Government of Cuba will be flown at the top of the pole at the front of the school every day except for those days it rains) The words *del Gobierno Supremo de Cuba* were crossed through in the filed copy an indication that the U.S. contingent was not supportive of the change from Small’s original wording (U.S. Army Overseas Operations and Commands, 1899, p. 5). There is an apparent division between what the Cubans who wrote the text of the original document in Spanish wanted to see regarding a national flag, and that which the U.S. forces saw as the flag that should fly at the top of the pole in front of the school house. Even at this early juncture following the end of the conflict there was the beginning of an attempt to establish the importance of Cuban nationalism amongst the leaders of the island and a resistance to that imposed by the U.S.

Under Military Order No. 226, the school term for the first year under this new school law was to begin on December 11, 1899. Article twenty eight reinforces this date and then adds the normal schedule for succeeding years. Beginning in 1900 the school was to open on the second Monday of September. While no reference is made to Labor Day, this U.S. holiday that unofficially marked the end of summer and a return to school was started in 1882 and is traditionally held on the first Monday of September. This might explain the arbitrary date selected by Frye for the beginning of the school year. The fall term should end on December 24th, and the winter term was to begin on January 2nd. This break allowed for the traditional Christmas and New Year’s holidays of both countries. What was missing from this schedule was

the traditional Three Kings Day (*El Día de los Reyes*) celebration which was the traditional exchange of gifts for Cuban children as part of the Christmas holiday. Held on the Epiphany, January 6th of each year, for Cubans the Christmas holiday did not end until *El Día de los Reyes* was observed. Since children in the U.S. did not typically celebrate this holiday, it was left off of Frye's list. The winter term that began on the second of January was to end on the Friday preceding the celebration of the holy week of Easter with the spring term beginning on the Monday following Easter and ending on the last Friday of June (Brooke, 1900). All other holidays were at the discretion of the Military Governor. The holiday structure included in Military Order No. 226 was very similar to that of U.S. schools that were structured around the traditional holidays and seasons of the U.S.

Schools were to be in session five days a week and five hours a day. The division of time from mornings to afternoons was to be at the discretion of the local school boards. Teachers were instructed to be in attendance at the school during the entirety of the school day. Saturdays and Sundays were holidays from school. The terms, length of school year, and no school on Saturday were departures from the familiar plans of education under the Spanish. The entirety of the school time structure matched that of the U.S. with apparently little thought spent on the existing culture of the Cuban people or their needs. As this plan was written early in the time that Frye spent in Cuba, it is fair to say that he had yet to develop an affinity for the Cuban people or developed *Cubanía*.

The final major school plan developed under the U.S. Occupational Government was Civil Order No. 279, published June 30, 1900 (Wood, 1900f, p. 628). The vast majority of this plan was directed towards the management of the school structure with very little interest or regulation given to specifics regarding attendance, holidays, etc. Information regarding the age

of admittance finally appears in the regulation in section 72. Titled “Who may be admitted to the public schools”, this single paragraph outlines a few changes in the age of attendance. Schools in each district were to be “free to all unmarried youth between 6 and 18 years of age, who are children, wards or apprentices of actual residents of the district” (Wood, 1900f, p. 639). This adjustment to the existing regulation elevated the top age for school attendance from sixteen under Military Order No. 226 to eighteen under this order. Holidays are found in section 74, although none are listed, it appears to give the authority to teachers to release students without creating issues related to their pay during any holiday that the Military Governor may decree (Wood, 1900f).

The regulations for the school year, week, and day are all found in section 75. The start time of the year was the same as was offered in Military Order No. 226 under Frye. Schools were slated to begin on the second Monday of September and end for the first term on the twenty-fourth of December. The new semester was to begin on the second of January, and end on the Friday before Holy Week (Wood, 1900f, p. 639). The final term began the Monday following Holy Week and ended when the provisions of section 69 were met. Section 69 had set the total number of school-weeks at 36 (p. 638).

The length of the school-month and school-week were set at four school-weeks to the school-month and five school days to the school-week. Each school day was to be six hours in length not including recess, a major departure from the five hour day under preceding plans. Schools were to consist of two sessions daily, one in the morning and one in the afternoon. Few changes exist in this regulation from the earlier law with the exception of those mentioned and the extension of the school day from five hours daily to six. This provision is changed later under Civil Order No. 310 on August 9, 1900, to five hours as it had been traditionally (Wood,

1900f, p. 693). One other adaptation that was made in Civil Order No. 310 was the establishment of a school year running from September 1st through August 31st of each year (p. 692).

Under Civil Order No. 368 published on August 1, 1900, all of the preceding changes under Civil Order No. 310 were added to the school law, and under section 75 two provisions were added that allowed the school day to be shortened by order of the Military Governor (Wood, 1900f, p. 821). No further changes of consequence regarding attempts to influence the culture of the Cuban people were attempted under any changes to school laws for the remainder of the period of U.S. intervention. During the second intervention period from 1906 through 1908, the school laws were not adjusted to any significant extent, only reinforced.

During the time of the second U.S. intervention in Cuba, Lincoln de Zayas was the Acting Secretary of Public Instruction. His Annual Report on the status of education on the island does not include much in the way of new legislation or regulation. Instead, de Zayas discussed the situation in the schools brought on by the recent civil unrest, and the changes directed to reopen and fund the schools. In order to accomplish this act, inspectors were hired and the school laws were enforced. Shortly thereafter, according to de Zayas, the schools regained “all the power and magnificence of the golden days of the first American intervention in Cuba” (MaGoon, 1908, p. 318).

One interesting factor that de Zayas points out was the rise of politics at the local school level due to the lack of regulation preventing politics from entering the schoolroom or in the case of the school boards, the boardroom. In order to prevent the bitterness of personal politics from entering into the schools; de Zayas suggested that an amendment to the School Law be granted that prohibited “any teacher, member of a Board of Education or employee of the department of

public instruction, to take active part in politics, such as making speeches in public, being president or secretary of political clubs” (MaGoon, 1908, p. 322).

The Annual Report of Lincoln de Zayas does not include any proposed or enacted regulation, nor does it make suggestion for regulation adjustments that directly affect the teaching process, enumeration requirements, or course of study. The only area of interest that de Zayas includes for this study was his inquiry into the state of the School City system developed by Wilson Gill. Stating that he was very much in favor of the system, he concluded by requesting a review of the island’s schools to determine if the system was still in use.

Coursework adjustments following occupation

Three areas of interest are treated in this section regarding adjustments to coursework under the U.S. occupation. The first is the selection of textbooks for use in the classroom. Second, is the ushering in of English language instruction, and the third, is the introduction of civics classes at all levels of education from Primary Instruction up through the island’s *institutos* and on into the University. Each of these adjustments was done with the intent of adapting the existing culture of the Cuban people through the medium of education. The importance of the ability to select what was to be taught to students cannot be understated. The selection of textbooks places a power over access to information in the hands of the individuals or groups charged with the selection process. For the schools in Cuba during the 19th century, this was the *Consejo Superior de Instrucción Pública* (Superior Council of Public Instruction) granted authority by the Captains General of the island (Rodriguez-San Pedro, 1865). During the U.S. occupation it was initially the duty of the Secretary of Public Instruction and then the Superintendent of Public Schools under authority of the Governor-General of Cuba (Wood,

1900f). In both situations, the authority over the choice of textbooks for the schools was centralized to a selection committee in Havana.

The language of instruction is an essential aspect of the culture of a people. Without a common language to use in transmission of information, the inherent meaning of any word becomes what each user decides and continuity between them devolves. In order to ensure that a concept is transmitted properly from one individual to another, a deep mutual understanding of the common language is paramount. This is especially important in the teaching of the language by the occupier of a foreign country. When a people are governed by an agency that is outside of their historical lineage, the introduction of a new language is inevitable. The occupying entity typically brings with them their language, a series of laws, and cultural behaviors that are utilized in their home region. In the period between initial exposure and mastery of the new language the agency in the subordinate position is at the mercy of the occupier. The group in the controlling position has the authority over meaning simply due to the ability to enact law that authorizes the official use and definition of each concept.

Prior to the U.S. occupation of Cuba the common language that had been taught in the schools was Castilian Spanish. As the controlling agency the Spanish Captains General were able to publish regulation and Royal Orders using the language of Spain, not that of the island. Cuban students were taught the meaning, use, and grammar of a language that had developed in a country far away from their shores with slightly different meanings than the language used on the island. This was primarily so, as Plato had stated centuries earlier, because without an understanding of the laws of the city, citizens would not be in benefit to the polis (Plato, 360 B.C.E./1997, 641b7-10). Over time, a continuity of historical experience existed between the

Cubans and the Spanish, clarifying the meaning of numerous words and phrases, including many that were foreign to Spain.

As the U.S. occupation unfolded, the introduction of the English language preceded the arrival of U.S. troops in many instances. Following the cessation of hostilities storekeepers in the major cities began to introduce signs in English to entice the arriving U.S. troops and to show their allegiance was with the insurrection and not the Spanish (White, 1898). Since the language the shopkeepers were using was relatively new to most of them, the message was not always skillfully transferred (White, 1898). This was also the case in the publishing of new laws in the general sense and with the introduction of new school regulations by the U.S. occupation force. In an effort to bridge the divide between the Cuban people and the occupying government, English language instruction began to make an appearance in the public schools of Cuba. General Leonard Wood, while he was in charge of Santiago de Cuba, stated that local parents were seeking English instruction for their children in order to prepare them to conduct business transactions with their new trading partner (Brooke, 1900a). Since the U.S. had control over the release of legislation, the authorities were only too happy to comply with the parent's request.

During the period that Cuba was under Spanish control and management of the education system on the island, lists of textbooks were approved by the Captains General in Havana every three years (Moyano-Samaniego, 1857). The control over the release of which books were to be used in classrooms on the island placed the access to information solely in the hands of the Spanish, ignoring any local input. By 1863 the triennial release of textbooks for the schools of the island had a second level of censorship beyond that of the Spanish Government. Prelates and Priests became arbiters of which textbooks could enter into schools along with the Captains General (House of Representatives, 1900, p. 853). While the regulation in the Plan of Education

of 1863 simply established their authority over texts for use in religious courses, the Church effectively had control over all books used in the schoolroom (Moyano-Samaniego, 1857). Through the gatekeeper function provided by the Captains General and the ecclesiastic authorities, only those texts that were deemed not contrary to the teachings of the Church, or those not fomenting unrest against the Crown, were allowed to join the list of approved textbooks. Since the Crown and the Church were closely intertwined in Cuba during the 19th century, textbook selection was controlled both directly and indirectly by the Church. The process of how this developed under the Spanish in the 19th century helps inform the apparent continuation by the U.S. Occupational Government on textbook selection, and as such is treated briefly below.

The selection process of textbooks under the U.S. Governor-General followed an almost identical path as that of the Spanish, with one clear difference, the U.S. officials attempted to rationalize the centralized selection process under the guise of availability and efficiency. When the new School Law was published on December 6, 1899, textbook publishing in Cuba had disappeared almost completely. Initial textbook selection was limited to those books available from U.S. publishing houses of works originally written in English and then hastily translated to Spanish. The poorly translated textbooks were ushered into the schools across the island with over 221,880 distributed (Wood, 1901a). The U.S. government attempted to rationalize this process stating that despite repeated attempts to solicit texts from Cuban publishers, “comparatively few have been received” (Wood, 1901a, p. 110). This statement by the U.S. authorities was essentially a complex ruse.

Since the school law written by Frye was published on December 6, 1899, and Frye had only arrived less than a month prior, it does not appear that adequate time to review and select

textbooks would not have been possible as the course of studies did not accompany the release of the school law. The sole Civil Order that I have been able to locate regarding solicitations for school textbooks was released on November 6, 1990 under Civil Order No. 454 (Wood, 1900f). While there may have been earlier solicitations that occurred outside of the official military and civil orders, they were not discoverable in the archives searched. The complexity of the textbook selection process and the lack of a clear course of studies available for textbook alignment effectively denied access to any Cuban publisher to provide a sample text.

A second issue that is tangential to this discussion was the differences between courses under study during the Spanish control of the island, and those regulated by the U.S. Textbook publishers, if any were still in active operation following the war, would have had only those books available that had been approved by the Spanish Captains General and Church authorities. In addition, few of these textbooks would not have been written in Cuba, but instead would have been imported directly from Spain. The lack of historical and cultural knowledge coupled with the absence of legal information regarding the publishing of texts on the island under the Spanish, allowed the U.S. officials to assume that no one on the island was interested in producing new textbooks for use in the schools of the island.

Beginning with the *Ley General de Instrucción Pública para las Islas de Cuba y Puerto Rico* (1842) (General Law of Public Instruction for the Islands of Cuba and Puerto Rico 1842), instruction was given to the students in morals education. This plan, the first transplanted from Spain to Cuba, established only five courses for Primary School students. The teaching of the principles of the Catholic religion and morals led off the short list (Rodriguez-San Pedro, 1865, p. 46). While no definition of what the teaching of “morals” entailed, it can be assumed to include those behaviors that the Catholic Church embraced during this time which included

chastity, fealty to one's parents and the Church, and behaviors in support of the Tenets of the Catholic Church. Had the occupation of Cuba by the U.S. occurred a century earlier, the teaching of "morals" in the Cuban school would have been found to be very similar to that taught in the Christian dominated schools of the U.S. The late 19th century shift from a religious centered vision of moral education to a secular version of morality was one of the myriad of forces that birthed the field of civics education in the U.S.

The call for civics instruction under the U.S. occupation occurred almost immediately as it appears in early plans for education from the provinces. Captain Small's request for an entirely new system was built around the concept of the development of citizenship. He asked that a method be instituted "that will lead to a general enlargement of intelligent citizenship in these communities" (Small, 1899a, p. 3). Requirements for the teaching of civics did not appear in the school law until Civil Order No. 279 where a course in Civics education was listed as a requirement for secondary education (Sanger, 1900, p. 600; Wood, 1900f, p. 574). Recognizing that a specific need was not being met by his Superintendent of Public Schools, Alexis Frye, General Wood took the issue of civics education into his own hands and invited Wilson Gill to come to the island. The use of the School City Program began the following May in Cuba and remained throughout the balance of the U.S. occupation. Each of these issues was important in the cultural influence attempted by the U.S. occupation force. In the pages below each will be examined in further detail.

Textbook selection, English language instruction, and civics

The selection of textbooks by the U.S. occupation officials was performed in a manner that gave preference to U.S. publishers while relegating Cuban publishing houses to a minor role. As was stated above, the selection process, since it was based upon coursework common in U.S.

schools, would have given preference to those companies familiar with U.S. teaching methods. Cuban publishers were not familiar with these teaching methods, or with the manner or style in which these new courses were taught. As such, any text that was submitted by them would not have supported the needs of the course. Until such time as the course of studies was published by the office of the Superintendent of Public Schools, Cuban publishers would have been in the dark regarding textbook requirements. Since it is evident that the Cuban teachers under the Spanish system utilized textbooks extensively in their classes (House of Representatives, 1900, p. 853), it could be assumed that books for use in the schools were previously produced on the island. This assumption is one that is built upon a series of hollow facts. While it is true that textbooks were used by the Cuban teachers, the books themselves came from Spain and were selected by Spanish authorities.

Unfortunately, due to the regulations contained in the plans of education from the 19th century, Cubans were not a part of the selection process for the textbooks used in their schools. Given the power assigned to the *Consejo Superior* and the ecclesiastical authorities on the island, and considering that these men were almost always Spanish, the texts selected were typically from Spain. This despite there being several exceptionally well written textbooks printed, published, and already in use in some of the island's schools. One such book was written by Eusebio Guiteras (1814-1890) that, according to Pérez (1945), had been printed in over 18,000 copies for use in the schools on the island. So widespread were Guiteras's textbooks that José Martí is quoted by Pérez (1945) as stating "... *para muchos hijos de Cuba la primera literature*" (... for many children of Cuba this was their first book of literature) (p. 246).

Under the U.S. occupation, the earliest school law proposed maintained that historical prerogative of central selection over textbooks in Cuba. The Board of Santiago suggested in

their regulation that “All text-books shall be prescribed by the provincial council, and no others shall be used in the schools” (House of Representatives, 1900, p. 860). Captain Small solicited textbooks from Ginn Publishing who responded with a letter on March 29, 1899 stating that they were sending “a copy of Frye’s Elementary Geography” adding that “this Geography will soon be translated into Spanish, with special maps and illustrations of Cuba” (Ginn Publishing, 1899). They conclude their letter to Captain Small with the mention of new books specifically for Cuba including “a Music reader for Cuba, Wentworth’s Elementary Arithmetic, and Tarbell’s Lessons in Language” (Ginn Publishing, 1899).

From the very beginning of Alexis Frye’s appointment to the position of Superintendent of Public School by Governor-General John Brooke, rumors abounded on the island insisting that he was an agent of his publishing house Ginn Publishing of Massachusetts. While stating that he did not believe that this innuendo was accurate, Wood gave voice to the rumor in a letter written to Elihu Root in December of 1899 (Wood, 1899c). Sensitive to the stories swirling around the capital of Cuba, Frye offered to donate all personal profits from the sale of his geography textbooks to Cuban charities, eventually dispelling the concerns of his detractors (Wood, 1900d).

Under Military Order No. 226, the textbook selection process was not mentioned. Frye simply stated that textbooks would be supplied free of charge to all students (Brooke, 1899). No other regulation emerged from Frye during the course of his tenure in Cuba regarding the selection or purchase of textbooks except statements relating to the quantity of textbooks delivered to the schools. The loose regulation contained within Military Order No. 226 that has been discussed above in several locations eventually led to the replacement of that regulation with Civil Order No. 279. The lack of direction regarding the selection process for textbooks is

another example of Frye's early deficiency of understanding the complex process of managing a school system.

Civil Order No. 279 was the first regulation that established the authority for textbook selection under a specific office. The Superintendent of Public Schools for the island of Cuba was now responsible for the selection of the textbooks to be used in the island's schools.

Contained in the text of paragraph four the Superintendent was responsible to:

...introduce proper methods of teaching in the public schools of Cuba, and shall select textbooks, and arrange the courses of studies for the different grades of public schools throughout the island; and in all schools of the island which are of the same grade; the same text books and the same courses of study are to be used. (Wood, 1900f, p. 629)

Although Civil Order No.279 was published on June 30, 1900, it was not until November 6th of 1900 that an official solicitation for textbooks emerged from Frye's office. The request for proposals to supply the textbooks needed in the Cuban public schools required that suppliers forward one copy of any textbook suitable for elementary grades to all of the named superintendents of the public schools of Cuba. The books could be "printed in any language" however they were to be accompanied by a typed Spanish translation if that language was not Spanish (Wood, 1900f, p. 987). The solicitation included a rejoinder to the salespeople of the publishing houses that the "members of said Board deem themselves competent to select the text books for the Island of Cuba without the assistance of agents of the publishing houses" (Wood, 1900f, p. 987). A list of subject areas accompanies the request for submissions that includes the following:

Series of reading books in Spanish;

Series of reading books in English;

Elementary arithmetic;
Advanced arithmetic;
Language books;
Elementary grammar;
History of Cuba for children;
Brief history of the United States;
Elementary (intermediate) geography of the world;
Geography of Cuba;
Physiology and hygiene;
Elementary civics;
Elementary agriculture;
Reading book of morals and ethics;
Song collection for Cuba. (p. 987)

One final caveat was added by the Superintendent of Public Schools regarding submissions: “It should be borne in mind that the public schools of Cuba are at present in an elementary condition, that most of them correspond to the primary grades of the United States” (p. 987).

In the report of the Commissioner of Public Schools dated February 26, 1901, Matthew Hanna outlined the process for the selection of textbooks to be used in the island’s schools:

The commissioner publically notifies publishers that books of a certain grade are to be purchased in stated quantities and requests samples of the same, accompanied by bids. These samples and bids are examined by the board of superintendents and this board determines upon the books that are to be purchased. (Wood, 1901a, p. 110)

Hanna also stated that most of the textbooks then in use in the schools were published in the U.S. despite the call to Cuban authors to submit proposed books. While a few textbooks by Cuban authors had been chosen by the Board of Superintendents previously, Hanna hoped that others who were interested in education on the island, especially teachers and other educators would submit offerings during future opportunities. Attempting to mollify any concern regarding the selection process, Hanna stated that the books selected were the best available at the time, unfortunately many are not suitable for Cuban schools. The reasons varied with some books having poor translations, others contained concepts entirely foreign to Cuban children like snow or sleds, and still others described customs totally foreign to the Cuban people (Wood, 1901a).

The list of textbooks adopted during the 1901 school year was as follows: Cyr's First Reader, Arnold and Gilbert's First Reader, Modern Series First Reader, Appleton's First Reader (English and Spanish), Cyr's Second Reader, Modern Series Second Reader, *El Lector Americano* Second Reader, Modern Series Third Reader, First Steps in the Spanish Language, Frye's Geography, Wentworth's Arithmetic, Arithmetic by Manuel Rodriguez (Hannah, 1902, p. 34). Additional texts being added during the upcoming school year are listed by Hannah as: *El Lector Moderno* (Second and Third Reader), Arnold & Gilbert's Third Reader, The Essential Part of the Spanish Language, Diaz' Spanish Grammar, History of America, History of the United States, Baldwin's First Reader, Riverside Primer, and Holme's First Reader (Hannah, 1902, p. 35). Of note in these lists of textbooks are the absence of history texts related to Cuba, the total reliance on English language texts as readers, and the inclusion of Spanish Language instructional materials written in English and then translated into Spanish. Total expenditures for textbooks during the 1900-1901 school year exceeded \$150,000, a substantial sum at that time (Wood, 1901a).

Having assumed the responsibility of selecting and providing the textbooks to the Cuba students, the U.S. contingent responded weakly at first and inefficiently following the slow start. Despite not having textbooks that met the needs of the island, obtaining poorly translated works, and others describing concepts that were outside of the frame of reference for the students, the Commissioner of Public Schools essentially blamed the Cuban teacher and publishers for not creating textbooks that meet the U.S. styled teaching process that were written in Spanish.

One of the first references to the necessity of teaching English to the children in Cuba was by Leonard Wood while he was in command of Santiago. In his report dated September 20, 1899, Wood declared that “there is not a schoolhouse in the department. Both children and their parents are eager to have English taught by competent teachers,” (Brooke, 1900, p. 369). The Board of Santiago included English instruction at every level from Kindergarten on upward in their proposed curriculum (House of Representatives, 1900). Beginning English was slated for the Kindergartens; English instruction was a large part of the Elementary Level Primary Schools, however, Spanish was not included until the Superior Level of the Primary Schools. At the higher level, slated for children between 10 and 14 years of age, Spanish grammar and composition and English grammar and composition held equal places in the coursework (House of Representatives, 1900).

Although he did not include a defined set of coursework, Captain Samuel Small did state that competitive examinations should be used to select the teachers and “at least one of them in each school should be able to teach English” (Small, 1899a, p. 7). José Monté also does not establish a language section in his brief plan of education, although it would be safe to assume that all of his classes would be taught in Spanish as he does not include any English preparation time in the daily schedule (Monte, 1899). These three early plans of education speak to the three

sides to this problem. Monté is trying to continue teaching as usual. His suggested coursework matches almost exactly that of Liras from 1880. The Board of Santiago is interested in a well-established introduction of English right from the beginning of the child's education. Captain Small, while interested in providing English instruction, was more interested in the adaptation of the island's culture through the development of citizenship. In the school law established under Military Order No. 226, Spanish and English again have equal place in the coursework. Since Frye's office released this law, and based on his perspective spelled out in the *Manual para Maestros*, it is obvious why he would have selected to keep both languages as equal in the Cuban classroom.

Two other areas can be examined to assess the importance of English as a part of the school curriculum. Those areas are the summer Normal Schools, and the certification examinations for teachers. Summer Normal Schools of 1900, the first year that they were held following the war, contained no requirements for lectures in English instruction. The summer Normal School of 1901 had as requirements instruction in methods of teaching English, 3 lectures (Wood, 1901d). The examinations for teachers in both years contained no requirements to show competency in instruction of the English language. Despite many of the textbooks having been written in English, neither the teacher examinations nor the summer normal schools contained any reference to English instruction except for the summer of 1901.

By the end of the U.S. occupation in May of 1902, English instruction was almost as prevalent as Spanish in the school law under the U.S. occupation. However, the reports from José Verona for that year, and board of education members from Cuba did not address the introduction of North American centered texts, courses, or the requirements of English education other than to speak of the virtues available to those who obtain competency in the English

language. This perspective was supported by Frye (1900a) who in writing a manual for the teachers of Cuba placed extra emphasis on the learning of English as the means of entry for Cubans into the world markets. Citing English as the “*idioma del comercio Americano, y en gran manera del comercio Europeo, Australiano, y Asiático*” (the language of commerce in America, and to a great extent of the commerce of Europe, Australia, and Asia), Frye (1900a, p. 80) presented a reasoned perspective to Cuban teachers of the necessity of teaching English. However, it is not just for the use of English in the commercial sense that Frye argues Cuban children should learn the language, “*otros por razón de sus tesoros científicos y literarios*” (for scientific and literary reasons) (p. 81). While much of his work is dedicated to the practice of teaching specific subjects, Frye (1900a) devoted more discussion in *Del idioma Inglés* section to the purpose and necessity behind the teaching, and less to the actual teaching practice.

Referencing the coursework undertaken by the 1,181 public school teachers who went to Harvard in the summer of 1900 it is easy to see the importance that English instruction held for Frye. English language classes were held twice a day during the summer excursion, and according to Eliot, was very popular (Harvard College, 1901). The summer normal school held on Cuba during 1901 also contained courses in teaching English. In Circular No. 21 issued by the Superintendent of Public Instruction, Alexis Frye, the summer normal schools for 1901 were to include three lectures in the methods of teaching English and six lectures in the teaching of civics (Wood, 1900f).

The last two school laws written by Matthew Hanna did not include any suggested coursework; instead, since these two series of regulations delegated the development of the course of study for the schools to the Superintendent of Public Instruction, he concentrated these plans on the management of the schools. It is safe to say that English instruction was to have

taken a paramount place in the classroom alongside the native language of Cuba under Alexis Frye. Not because he believed that the English language was better than the Spanish, instead, because he believed that the increased opportunity that the future would bring for Cuba necessitated the knowledge of English in the population. Under José Varona, the emphasis on English education in the classes of Cuba did not wane, yet the number of English textbooks distributed was far below the level purchased (Hanna, 1902). This may be due to Varona having resided in the U.S. for several years during the Cuban War for Independence and his own knowledge of English. One interesting facet of Varona's final report under the U.S. occupation is that it was written entirely in Spanish and did not include an English translation as had previous U.S. Annual Reports indirectly speaking to the changing perspective of English language education.

In the Annual Report from the Acting Secretary of Public Instruction under the second U.S. intervention, Lincoln de Zayas did not follow a traditional style of report. Instead he presented a less focused response and a sort of wish list to Governor MaGoon. In Chapter VIII de Zayas discussed the new courses added during the previous year. One of the new courses taught was English that de Zayas stated was presented by 94 teachers during the past year (MaGoon, 1908, p. 328). This is an indication that the English courses that were an equal part of the curriculum in 1902 had dropped in importance in the five years between. In Chapter III de Zayas attempted to make the case for the renaming of the department he was in charge of from Public Instruction to Public Education. He stated that this should come to pass since the object of the school is to educate, to “prepare man, as a social being, for the business and duties of life” (p. 319). Due to the fact that the schools were engaged in the process of “imparting of facts to the pupils, but also includes civic and moral instruction, and the exercise of rights and the

performance of duties of citizens,” Public Education was more apt as a title than Public Instruction (p. 319). From this comment I can determine that civics education was more likely than not still being taught in the classrooms of Cuban schools.

The *Junta de Educación* in Havana sets forth the initial mention, I was able to locate, of civics instruction as necessary to build not only a love of family, but also of country, respect for the laws, and the duties of morality and honor (Junta de Educación de la Habana, 1901, p. 19). A second new item articulated by the *Junta* was the introduction of the “*Ciudad Escolar*” or School City Program (p. 19). This process was intended to construct schools in Cuba in the model of an American city, complete with mayors, elections, and police. However, the *Junta* did suggest some of the facets of the program should be eliminated due to the incompatibility with the existing customs and way of life of Cubans (Junta de Educación de la Habana, 1901).

Apparently in response to the call for Cuban authors to prepare textbooks for use in the schools of Cuba, a work entitled *Principios de Moral e Instrucción Cívica* became available for the 1902-1903 school year. Prepared in 1902 by Rafael Montoro (1852-1933), the founder of the *Autonomista* party, the instruction for moral and civic education was divided into two parts. The first section, containing eight lessons, explored the concepts associated with morals and how they were related to the development of responsibility and duty of man to society and himself (Montoro, 1902). The second section was focused on the development of government, the idea of the Nation, and the interaction between the individual and the Nation. Further lessons included the forms of government and the purpose of the Constitution of a sovereign state (Montoro, 1902). Following the development of the idea of a fundamental set of laws that are used to manage the daily workings of a nation, Montoro (1902) delved into the different forms that the Cuban Constitutions have held from the *Guáimaro* Constitution developed in 1869,

through the *Jimaguayú* and *La Yaya* Constitutions established in 1895 and 1897 respectively (Montoro, 1902). The final topic under constitutions was an exploration of the Constitution of the Republic of Cuba ratified earlier that year. Citizenship and Civic Duty were the topic of Lesson XVI. In this lesson Montoro (1902) sought to instruct the Cuban student in the rights they have as citizens of Cuba, and also their duties to the nation and to other citizens.

In total there are thirty four lessons in the section on Civics. Combined with the eight on Morality, Montoro's (1902) work lays a strong foundation for the concepts of citizenship for the young Cuban. The structure of the book allowed for a novice teacher of Morals and Civics to teach the lessons as it included references to additional source material and was buttressed with quotations and ideas from many of the notable scholars on citizenship from the 19th century and earlier. Included with each lesson were "Questionnaires" or quizzes on each concept (Montoro, 1902). The method used in these quizzes was an essay response, requiring the student to extrapolate on the concepts learned. Montoro's (1902) textbook on Civics and Morality was the first one developed exclusively on the island.

In order to further instruct students in the changing concepts associated with citizenship on the island of Cuba, Montoro developed a new textbook in 1908 written in a manner that could be used exclusively in the schools of the island. Titled *Nociones de Instrucción Moral y Cívica*, this textbook was a collaboration with Adrián del Valle (Montoro & del Valle, 1908). These two textbooks on Civics instruction were widely used in Cuba for the purpose of teaching the new concept of citizenship to a growing Republic.

Prior to the development of an island produced method of teaching Civics and Morals, the Occupational Government of the U.S. relied on a system of civics education taught by the act of doing. Under the School City system developed by Wilson Gill, civics education was taught

through a process where the students performed the duties of the leaders of a municipality. Students ratified a Constitution, elected leaders, and practiced the process of managing a city within the confines of their schools and neighborhoods. As student *Alcaldes, miembros del Consejo de la ciudad*, and *Jefes de Policía*, students learned about the concept of government, the purpose of, and enforcement of the Laws.

The School City

As I entertained the idea of this area of research my attention was piqued by the hints in other scholar's work of a system of civics instruction that was introduced in Cuba during the U.S. Occupation. A concept called The School City developed by Wilson Gill (1851-1941) was mentioned in several works directed at this time period. As is often the case in studies that explore the historical significance of a series of events, one scholar mentions, briefly, a particular concept who is then cited by others in their quest to provide a complete study. My first brush with the School City concept emerged during my reading of Gonzalo de Quesada's 1905 work titled "Cuba". Tucked into one short paragraph in the section on the history of education was the following:

The organization of "school cities" was one remarkable feature introduced during the year 1902. The plan is to have the scholars organize themselves into bodies, similar to the municipal governing bodies, the purpose being to teach the youth the first principles of responsibility and self-government. The plan has worked with remarkable success and great things are predicted for the future. (de Quesada, 1905, p. 276)

Here is one of the first indications that civics education was introduced on the island by the U.S. Occupational Government. Further research on this topic produced a plethora of results, from the name of the author of the program, Wilson Gill, to the history of its development and

the method of the “school city” arriving in Cuba. The results of the research in this area have given great insight to the efforts by Wood and others in their desire to adapt the children of the island to the culture of the U.S. This was the impetus for what Pérez called “annexation by acclamation” (Pérez, 1982, p. 6). In terms of major efforts to influence the Cuban system of education, the “school city” was by far the most pernicious.

Gill spoke to the purpose of the School City program on Cuba in a letter that was intended to support a Bill offered by U.S. Congressman Owen in 1914. Citing General Leonard Wood as the individual having the most experience utilizing the program, Gill stated that “[O]n him rested the responsibility of cleaning Cuba, driving out the mosquitos and yellow fever, and thus protecting the people of our Southern States from the annual threat of a yellow-fever epidemic, which always came from Cuban ports;” (Gill, 1915, p. 5). Gill believed, and said as much in this letter, that if the country was kept clean of infectious disease then the fear of “periodical revolutions” would avoid the island (p. 5). According to Gill, Wood “could not get at the grown people directly to instruct them for these purposes, but he could indirectly, through the children” (p. 5).

Further proof of Gill’s intent to influence the moral development of the island’s children is evident in his pamphlet “A Social and Political Necessity” (1902). In this short promotional work, Gill discussed his initial observations of the Cuban people. He stated that his analysis was needed to craft the school charter for use with the School City program he was hired to introduce. (See Appendix 2 below for the complete School City Charter of Cuba.) Gill’s conclusion was that the Cuban people had a propensity towards self-preserving deceit, developed through years of avoiding the Spanish Government’s tax officials. Behaviors of that sort, according to Gill, corresponded to an island full of people inculcated to following the directions

of a monarchy, and were not suitable traits for a democracy. His suggestion was to forget changing the behavior of the adults in Cuba, but instead concentrate on the children. “It is comparatively easy to change the course of formation of a child’s character. The younger the child the easier the process, provided the teacher is tactful and uses a good method” (Gill, 1902, p. 12). It is clear from his comments that Gill saw himself as a beneficial force that was engaged by the U.S. Government to adapt the morals of the children of Cuba to U.S. standards of behavior.

The basic concept of what a School City entailed was described by Gill in his Annual Report for the U.S. Occupational Government written some time following August 31, 1901. The School City is a program that intended to organize the students of a school, under the charter supplied by the island government, into citizens of a school-centered municipality. Under a Charter developed by the State Government, a city council is elected by the student-citizens of the school, who in turn elect a mayor and judge, along with other essential judicial and executive officials. The voice of the citizens is augmented by the Swiss initiative practice (where any member of the electorate can bring forth legislation), enabling all citizens to express their concerns or interests with the school government. Each of the elected positions has lengths of terms with the longest for the Mayor and City Council set at ten weeks and the shortest for the classroom police set at just two weeks (Hanna, 1902).

The birth of the idea for the school city concept had begun in 1893 in New York City with a teacher named Bernard Cronson (1865-1916) who taught at Public School No. 69 (Cronson, 1908). Cronson had used self-government concepts with his students during his years as a teacher at that school. He was also President of the New York Patriotic League, a regional offshoot of the National Patriotic League founded two years earlier by Wilson Gill. Through

discussions with Gill, and Gill's observations of his classroom, the School City Program began to take form (Cronson, 1908). By 1897 Gill believed that his program was ready for a broader test. In consultation with Mr. R. Fulton Cutting, Gill organized one of the school district's "vacation" schools into a School City (Gill, 1901). Having hammered out the basic concept with Cronson, Gill next introduced the School City to over "1,100 school children in New York City, with entirely satisfactory results" (Gill, 1915, p. 3).

While returning to New York from a business excursion, Gill met with President of the Philadelphia School Board, Simon Gratz. After describing the School City program to Gratz, he agreed to introduce the Gill Method into one school in the city. That fall Gill moved on to Philadelphia, where in concert with the Philadelphia School Board and the Franklin Institute, he introduced the Gill System of Moral and Civic Training to the Hollingsworth Primary School during the 1898-1899 school-year (The Franklin Institute, 1904).

The Principal of the Hollingsworth School, a Ms. Anna McCormick, was the first administrator in Philadelphia to experience the Gill Method, as it came to be known in that city, and gave it high praise. Discussing her opinion of the method in 1903, Ms. McCormick stated that after the introduction of the school city in her school: "Good results followed immediately and have continued throughout these five years. Much of the rough conduct outside of the school rooms has been removed, and thereby the task of both the teacher and pupils has been materially lightened" (The Franklin Institute, 1904). In addition to the general knowledge that the students were gaining from the practice of elections and similar government practices, Ms. McCormick was more interested in the ethical lessons that the students were learning.

The 1898 to 1899 school-year corresponded to the first full year of U.S. occupation of Cuba. While Gill was working in Philadelphia, much of the country was following the exploits

of the U.S. Occupational Government in Cuba, including several very noteworthy members of the Patriotic League. Included as members of his national organization, Gill had several highly placed politicians on his board of advisors. Presidents Cleveland, Harrison, and McKinley were members, as were future President Theodore Roosevelt, Admiral Dewey, and Leonard Wood then Governor-General of Cuba (Gill, 1901, p. x). An excellent politician in his own right, Gill utilized his connections constantly to develop funding for his civics training projects, and further opportunities to introduce his method. One of those opportunities came to fruition with the prospect of introducing the School City program to the Cuban schools.

In the fall of 1900, Gill was approached by Wood to come to Cuba and introduce the School City program in the islands schools. Apparently there was some discord regarding Gill going to Cuba that emanated from President Eliot of Harvard, and Secretary of War Elihu Root. This mild disagreement came to light in a discussion that Gill recounted between himself and Root following the end of the Cuban program. According to Gill's account of the short discussion, Root stated that it was not his "lack of appreciation of the value of your ideas on moral and civic education, that made me doubt the wisdom of your going to Cuba, but I thought with President Eliot that it was illtimed; [sic]" (Gill, 1902, p. 2). However, continued Root, now that you have completed the work and had such successful results I "am deeply gratified that you went and have accomplished so much good" (p. 2). The majority of Gill's pamphlets and articles are essentially promotional materials, so it cannot be ascertained for certain that these conversations took place in the manner that he recounts. However, the letters of support that are placed in the official reports from Cuba can be considered as accurate. Whenever possible the Annual Reports from the Commissioner of Public Schools were utilized for quotations regarding Gill's accomplishments.

Arriving on Cuba in October of 1900, Gill set to work reviewing the existing school system of the island and the development of a School Charter upon which to build the School Cities of Cuba (Hanna, 1902a, p. 647). The School Charter was published on May 1st, 1901 with Gill beginning work on the 13th of the same month to introduce the method in six schools in Havana (Hanna, 1902a). According to the Commissioner of Public Schools, Matthew Hanna, the charter was not modeled on any particular city; instead it was designed to assist with teaching the principles and practices of citizenship and free government (Hanna, 1902a).

The six schools in Havana that were selected to introduce the new program on the island included: Boy's School No. 15, Boy's School No. 25, Girl's School No. 48, School No. 25, Girls School No. 30, and Girl's School No. 8 (Gill, 1902). Each of the Principals who managed these schools wrote a short report outlining their experience with the School City program. To gauge the effectiveness of these programs a review of the Principal's comments, those of Gill regarding the installation of a School City in *Güines*, and general remarks from the executive school officials of the island will be pursued.

The first report review is that of the Principal of School No. 15, José Miguel Fernández de Velazco. His school, located in the neighborhood of San Leopold, had improved greatly under the management put in place by the School City Charter. The students had responded favorably to the imposition of the new regulations resulting in a reduction of bad behavior both in the schools and in the neighborhood streets. Recognizing that the students of the school would be the citizens of the island in a few years, he believed it was important for them to learn both their duties and rights and saw this system as being beneficial for both. To emphasize his point, de Velazco stated that the schools of today should take a page from the past and institute the teaching of civic concepts the same way the Spanish taught religion. "In the same way that

they were formerly made to learn in the schools the Catechism of religion, they should be made to-day to learn the Constitution of their country and the Catechism of their duties and rights” (Hanna, 1902, p. 130).

Continuing his tie to the religious history and culture of the Cuban people, de Velazco stated that the “maxim” located in the first paragraph of the School City Charter of “Do unto others what thou wouldst have done unto thee” are the “granite pillars which serve as a foundation to morality and to all religion” (Hanna, 1902, p. 131). In closing his remarks, de Velazco offers his belief that the Gill system has improved the behavior of the students in his school, not only in the classroom, but also in the neighborhoods. He stated that it was easier to obtain order and discipline using this method because the students were interested in its use, and that the program should continue (Hanna, 1902).

The report from Justo L. Falcón, Principal of Boy’s School No. 25, was brief, but it provided an interesting observation on the use of civics education in the country. One insightful comment was the understanding that based on the type of government that had been chosen to manage the country, a method of teaching the children the basic tenets of this process must be used. Since Gill’s method provided for the teaching of morals and civic instruction, he believed that the program should be incorporated to teach the political and social concepts needed to support the Constitution (Hanna, 1902).

Adelaida Piñera, Principal of Girls School No. 30 was not as succinct as Falcón in her response. After discussing the improvement of the behavior of her school, which she states was not that bad to begin with; Piñera explained how the system fostered a sense of competition amongst the young students. “[A]ll the girls attending this school, both the electors and elected, vie with each other in preserving order, in rendering good help to the teachers in their

preparatory work, in practicing charity, in helping themselves in necessary cases, etc.” (Hanna, 1902, p. 132). The main benefit that she saw in the use of the system was the teaching, in an objective manner, the civic and moral instruction necessary to run the country. Issuing her personal belief at the close of her comments, Piñera offered that if this system was implemented in the island’s schools, the country would be benefitted.

The Principal of Girl’s School No. 48, Magdalena Pardo de Castroverde, did not hold back her enthusiasm for the School City in her report. “I consider it an excellent method of civic instruction” was the very first line of her commentary on the program (Hanna, 1902, p. 132). She points out that in her school the students had derived the following advantages from the program:

First: They have been initiated in the knowledge of the rights and duties of citizens;

Second: They have learned to love truth, which is the virtue of all free countries;

Third: They have learned to obey and respect established laws which regulate order, the principle factor in every civilized community. (Hanna, 1902, p. 133)

Closing with the statement that the program took only two hours to implement, she offered that the introduction of the School City would “render beneficial results to the schools of our country” (p.133).

Reports from the remaining teachers follow the same vein, the system, while not perfect was the best that they had available to teach civics and moral behavior to the students now that the church was no longer directing the curriculum of the schools. Although the Gill system was in place for a relatively short period of time in their schools, all of the Principals stated that it should continue to be introduced across the island. This was, by then, the third version of the School City Program that Gill was utilizing in Cuba, however, it was the first one used in a

foreign country, by a population that did not speak English. Despite the difference in language, Gill stated that the system was accepted readily in all parts of the island. As example he offered a recounting of the introduction of the School City program in *Güines*.

After traveling by train to the city of *Güines* with Provincial Superintendent Aguyo, Gill stated that the first school that they stopped at had already created their own School City. Moving on to a second school that was contained in an old military barracks, Gill discussed the introduction of the School City method with the principal and the thirteen teachers present (Hanna, 1902). Due to the physical constraints of the barracks, the students were moved to a local town hall for the assembly where they were to create the School City. Accompanying the students and teachers were the town's Mayor, the *ayuntamiento* (town council), and approximately 150 men of the town (Hanna, 1902). After informing the students, and the assembled men of the town, that his Spanish was not strong enough to give a speech, Gill had his remarks read by one of the teachers of the school (Hanna, 1902). Following his remarks the process for establishing a School City in any school on the island was also read. The teacher then walked the students through the creation of the School City. Upon the conclusion of the elections and the acceptance of the basic code of laws which contain the rudimentary regulations for behavior of all of the students, the program was completed. When the code of laws was presented, Gill offered that it was amendable by the students in the Swiss initiative manner, however, he suggested that the students should not attempt to alter the code too soon as they were at present unfamiliar with the process of making laws (Hanna, 1902). A copy of the School City Ordinances is attached below in Appendix 3.

At the close of the ceremony in *Güines* the *alcalde*, *Señor* Rodríguez, approached Gill to thank him for introducing the School City to the schools in his town. He stated, according to

Gill, that the “seeds of citizenship” were sown that day in *Giüines*, and that in the days following “These men and boys will sow the seeds, not only in their own families, but throughout the entire population” (Hanna, 1902, pp. 659-660). For Gill, Wood, and the other pro-annexationists on the island and back in Washington, this could not have been a better outcome. The idea of retraining the children of the island of Cuba to adopt U.S. methods of instruction and concepts of civics appeared to be well underway and working just fine.

Concerned with the growing problem of lax discipline in the schools of Cuba, José Varona examined the School City program as it was described by Gill, and apparently was pleased with what he observed. Stating that the

...controlling idea in his (Gill’s) system, is to wake up, in the children, the conscience of solidarity, that is, not only a personal, but a community conscience, and not only the knowledge of the importance of cooperating for the general good, but the knowledge of *how* to do it and the *habit of actually cooperating for the welfare of all*. (emphasis in original) (Gill, 1902, p. 25)

The major benefit that Varona saw was the act of doing, which fit into his personal and professional beliefs regarding how education should work in a school.

One of the U.S. Special Inspectors of Schools for the island of Cuba, a Dr. E. B. Wilcox, was also greatly impressed with the School City as it promoted the self-discipline of the students. In his examinations of the schools across the island, Wilcox stated that he had observed a general resistance to any form of discipline imposed by the teacher. This was true for student and parent alike. He believed this was due to the strict rules under which the Cuban people had lived while being ruled by the Spanish. The solution to this unique problem was to be found in the School City program as it was developed by Gill. This, according to Wilcox, was due to the fact that

instead of the teacher imposing upon the student discipline, “the children, guided by the teachers, discipline themselves” (Gill, 1902, p. 28). Beyond its value in moral and civic training, Wilcox believed that the best value of the system was in how it improved discipline in the schools.

The final word on Gill’s School City System of Moral and Civic Training came from the Commissioner of Public Schools, Matthew Hanna. In his assessment of the system the Commissioner stated that he believed Gills program had passed the experimental stage and should be introduced in the schools of the principle cities of the island. In contrast to the glowing reports offered by the school Principals, the school executives and Gill himself, Hanna suggested that some teachers have not appreciated the benefits of the program. He offered that a great deal of caution should be used in its implementation to “avoid its being mutilated and misapplied in some instances” (Hanna, 1902, p. 133). Despite the caution that Hanna suggested, Varona listed over 50 School Cities that were prepared in Havana, and that the system was in place in Cienfuegos and Santa Clara (Gill, 1902).

Gill’s School City Program took Cuba by storm. By the end of his time on the island, Gill boasted that he had implemented over 3,600 School Cities with more on the way. The program received glowing reports from most everyone with whom it was brought in contact. Students enjoyed the opportunity to be involved in their own discipline; teachers relished the constructed method of teaching a topic they knew little about. Mayors and town councils, especially in the countryside, regaled the benefits of teaching not only the students about how to be a good citizen, but also their fathers. Most of all, the school officials from the Principals on up to the Secretary of Public Instruction recognized the benefits of the moral, civic, and personal benefits of the system. Few, however, recognized directly that the system of moral and civic

education that Gill developed would also indoctrinate their children into a system completely different than anything their parents had experienced.

Chapter 5

The crafting of a nation through education

When the final shots were fired in Santiago de Cuba in July of 1898 and the end was near for the Spanish Empire in the Caribbean, hopes were high in the U.S. and Cuba regarding the development of a new nation. Cuban insurrectionists had fought a difficult and protracted war against a barbarous foe. Their homes were destroyed, their livestock and crops had been consumed either by fire or the Spanish troops, and several hundred thousand of their countrymen were dead from conflict or the heinous *Reconcentrado* program. However, the hope for a new nation that would emerge from the ashes of the island's conflict was at the forefront of every Cuban patriot's thoughts. For the first time in over five hundred years, Cuba would be ruled by Cuban Citizens. A new nation was to be formed that would be led by the sons and daughters of Cuba free to determine their own destinies and chart a path forward amongst the other nations of the world, *o al menos eso se creía* (or at least that is what was believed).

While the Cuban people were breathing a sigh of relief following the recent three years of bitter conflict, the U.S. Government was planning for a protracted stay on the island (Brooke, 1900). Under the provisions of the *Protocol Concerning Peace*, the U.S. Government was charged with the protection of the Spanish Army during the period of withdrawal from the island (Protocol Concerning Peace, 1898). With the cessation of hostilities, U.S. troops began to occupy the spaces left vacant by the ousted Spanish. As the Spanish Army pulled back from the countryside to Havana, the victorious Cuban forces filled in the empty territory. To ensure that the defeated army of Spain would not be molested by the Cuban forces, the U.S. Army

maintained a buffer between the two antagonists. Slowly the island came under the control of the joint force of U.S. troops and the Cuban Insurrection Army. Between the months of July 1898 and December of that same year, the Spanish presence on the island diminished. At the same time, the U.S. presence increased dramatically. This increase in the population of U.S. individuals in Cuba was not simply due to the addition of troops from the U.S. Army; instead it was a conglomerate of private individuals, military personnel, and Cuban/American citizens returning home following the conflict.

The pressure placed on the island's resources during the war had exhausted much of the food reserves, causing many Cubans to face starvation. In response, as they took control across the island, U.S. troops began to distribute daily rations to the population. During the six months from July of 1898 through January of 1899, approximately 6,493,500 rations were distributed (Brooke, 1900a). This simple act eventually placed the U.S. military in the driver's seat regarding what was to be done on the island. By becoming the source of sustenance for a people, they inadvertently also became the locus of all problem-solving and decision-making for the next four years.

While the Cuban leaders, both civilian and military, were planning out the future of the island, the U.S. Government was meeting in Paris with the Spanish delegation, charged with drafting a peace accord. The result of this meeting was the *Treaty of Peace*, signed on December 10, 1898 ceding all of Cuba, Puerto Rico, and the Philippines to U.S. control (Treaty of Peace, 1898). While Puerto Rico and the Philippines were taken as bounty of War Cuba had remained in a protected status under the *Joint Resolution of Congress*, commonly known as the *Teller Amendment* (H. J. Res 233, 54th Congress). *The Teller Amendment* was added as a codicil to the *Joint Resolution of Congress* that stated Cuba had a right to sovereignty free of the influence of

Spain. It was added to this resolution by Senator Henry Teller of Colorado. The gist of the amendment was that the U.S. would act to prepare Cuba for self-rule and then leave the island. However, what the amendment did not stipulate, and what was omitted from the *Treaty of Peace* with Spain was what any of this entailed, and how long it might take.

Cuban leaders believed that the Joint Resolution protected them from outright annexation by the U.S., something many Cubans feared. However, not all Cubans were against annexation as many of the affluent land owners in an effort to protect their property had joint citizenship in the United States and Spain that was established during the previous war. In addition to this group, numerous Cuban citizens saw statehood in the U.S. as an economic opportunity for their families. Only two groups, several high-ranking officers of the Cuban Insurgent Army and many professors at the University of Havana, were diametrically opposed to annexation. Surprisingly, in the months following the assumption of control over the island, several of the more influential generals from the Cuban Army changed their stance and favored annexation. This became apparent in their taking employment from the U.S. government in many of the high profile jobs in the reconstruction effort and their silence during the introduction of the Platt Amendment.

U.S. interests in Cuba were manifest. Factions of the U.S. Government were aligned to annex the island; others were set against any deeper relationship than already existed due to the economic cost in Cuba and at home in the U.S. Many private businesses saw the economic opportunity that Cuba presented for inexpensive labor and raw materials. However, the most vocal and strident force working for annexation was members of the progressive wing of the U.S. Republican Party. Included in this group were current and future Presidents, cabinet members, Congressmen and Senators, and many of the U.S. Military's youngest officers. The lure of Cuba as an outpost to protect the southern U.S. from European incursion had existed for

almost a century. U.S. presidents as far back as Thomas Jefferson had spoken of the natural extension that Cuba provided to the U.S. mainland, with both Presidents Polk and Pierce attempting to purchase the island from Spain. President McKinley, in the weeks leading up to the conflict had tried twice to purchase the island rather than go to war.

In the weeks that followed the *U.S.S. Maine* disaster, the drumbeats for war overpowered those for peace and the U.S. entered the conflict allied with the Cuban insurrectionists against the Spanish. Presented with the opening of a standing army situated in the territory that he had recently attempted to acquire from Spain, McKinley recognized his opportunity to take control of the island. His one obstacle was the Teller Amendment. McKinley and his advisors accepted that while the amendment prevented them from the outright taking of the island as a bounty of war, it said nothing regarding the incorporation of the island into the U.S. if the people of the island requested annexation and eventual statehood.

Several of the members of the progressive wing of the U.S. Republican Party were members of various patriotic societies at the close of the 19th century. One of these, The Patriotic League boasted in its membership Presidents McKinley, Cleveland, and Harrison, future President Theodore Roosevelt, Admiral George Dewey, and Brigadier-General Leonard Wood. Since its inception in 1891, the Patriotic League had been focused on improving citizenship in the schools of the U.S. through the methods of improved discipline and self-government. Both of these factors were opportunities that were present in Cuba at that time. The opportunity to utilize U.S. citizenship education practices during the restructuring of the Cuban education process was an opening that the Progressives in control of the White House could not pass up. To that end, once the initial stabilization efforts had tempered the desperate

needs of the people, they intended to restart the school system of Cuba in the image of the one ongoing in the U.S.

This study was undertaken to examine the processes that were utilized in the reformation of the education system in Cuba following the conclusion of the Cuban War of Independence. In pursuit of this goal, three questions were posed to guide the research process: the changes that were imparted in the education system through the use of legislation and regulation; the influential individuals who enacted these plans of education; and what influence, if any, was brought to bear by the new process of education in Cuba. Integral to the construction of this study has been the inclusion of discussion congruent with the presentation of data. This process was followed to present a clearer view of how the data collected were related. Rather than present a review of this previous discussion, I offer in this section an analysis of the data based on one or two major themes evident in the research. In my analysis I attempt to review each question individually, however, where integrating the responses add clarity, I follow that path. Next, I discuss unexpected findings as they relate to these questions and some unexpected omissions from my findings. Finally I conclude with an analysis of the results of the study and offer several areas for future research. I have presented the results of that inquiry above, what follows is my interpretation of the collected data as it relates to the education system and the culture of the Pearl of the Antilles.

Discussion of Question 1: The Legality of Education

What courses were included in the K-12 curriculum, under U.S. military rule after the Cuban War for Independence, and what perspectives were utilized in their selection?

As the sun set on the Spanish Empire in the Caribbean, the legacy of their four hundred year occupation of the island of Cuba lived on. One manner, in which it continued to exist

following the capitulation by the Spanish Army to U.S. and Cuban forces, was in the laws that remained behind following their departure. While the U.S. Army was busy feeding the starving and attempting to improve the sanitation and infrastructure of Cuba, the laws left behind by the Spanish were still in use across the island. Even though the Spanish had lost possession of Cuba, their legacy of laws was still in control of the education process on the island. Essentially, the legality of education is the important focus of this section. What I mean by this is not only what coursework was taught, but who was in charge of deciding the curricula, structure of the schools, finances, and the management of the data extracted from this process. Intertwined with the legality of education was the experience and expectation of those enforcing the existing and crafting of the new laws.

By controlling the legal aspect of education, every decision relating to the schools in Cuba came back to the party in control of the law. Under Spain during the majority of the 19th century, this was the Spanish Cortés. The Spanish Cortés was the most influential government agency in Spain at that time. It was constructed, through popular election, of 456 seats of which, during the last two decades of the 19th century, the majority were held by members of the Liberal party of Spain (Clarke, 1906). Under the U.S. it was the Governor-General and his designees. When the political factions in charge of the laws of education swung in one direction or the other, the fortunes of the students in Cuba pivoted with them. For the Spanish, in the early 19th century, when the Cortés pushed more to the liberal direction, free public education began to be instituted on the peninsula. Under the Law of Primary Instruction of 1838 for example, el marqués (the marquis) de Someruelos, Joaquín José Muros (1797-1859), radically changed who was in control of the management of the school system in Spain. Muros' plan made the town councils, or *ayuntamientos*, fully responsible for the development of the schools, the hiring of

teachers, and the management of the financial needs of the institutions (Reglamento Provisional de las Escuelas Públicas, 1838). Unfortunately for the Cubans, this provision of the regulation did not transfer over to the island with the plan of education established in 1844. Control over the selection of teachers, enjoyed in Spain, placed the local authorities as the decision makers for the fortunes of their children and removed the power over what was taught from the Cortés. On the island of Cuba, however, the decisions were made in Havana, centralized in order to control all aspects of the education process.

Following the pattern from the two decades prior, the Plan of Education in 1863 did not carry to the island the benefits added to the Plan of Education of 1857 in Spain. The perspective that would have been used by the Spanish in selecting the coursework for their schools was based in practicality. Schools, especially those in Cuba, were a luxury for the Spanish Crown. While millions of pesos were expended for other areas, education on the island received almost nothing in the way of funding from Spain. To create schools and coursework that might be used for independent thought was against the idea of self-preservation for the Crown, especially following the Ten Years War (1868-1878). This was evident when *El Plan General de Estudios de 1863* (The General Plan of Studies of 1863) received major reconstruction following the end of the war in order to remove the possibility of further unrest. Under the Plan of 1863 the Church was being granted a larger role in the development of instruction in the school system of Cuba in an attempt to counteract the rising level of independence surging across the island.

In an attempt to mollify the unrest, Spain decided to adjust some of the regulation that controlled the schools. The *Plan de Instrucción Pública de Cuba* (Plan of Public Instruction) of 1880 was the first Royal Decree from Spain that aligned the schools and degrees from Cuba with those on the Peninsula. Prior to this time, degrees earned in Cuba, be they diplomas from

primary of secondary schools or degrees from the University of Havana, were not accepted in Spain as being equal to a peninsular education. In order to ensure that the education received under the diploma or degree was equal to that from Spain; compulsory education was instituted on the island under this plan in Chapter 1, Article 7 (Legislación de Instrucción Pública de la Isla de Cuba, 1881, p. 16). For the first time, according to Article eight of Chapter one, parents in Cuba were to be fined between “*dos a veinte reales fuertes*” (two to twenty dollars) for the repeated absences of their children from school (Legislación de Instrucción Pública de la Isla de Cuba, 1881, p. 16). The introduction of compulsory education was a first for the island, and one that was not readily enforced. This lack of attention to regular attendance was one the U.S. also faced without solution. Two new provisions in this plan were the creation of a Normal School in the capital city of each province and the assignment over the local schools and teachers to *ayuntamientos* (town councils). Despite the attempts under this plan to have the town Mayor and parents manage the schools, the reassignment of control over the local schools to the *Consejo Superior* (Superior Council) in Havana, undermined any belief that parents had over the control of education for their children. By 1880, the differences between what existed as the Plan of Education in Spain and what was practiced in Cuba had broadened.

The series of regulations that were in effect in late 1898 and throughout almost all of 1899 was the Plan of Public Instruction of 1880. This is the plan that Robert Packard listed in his work on the status of education in Cuba, Puerto Rico, and the Philippines in 1899. Borrowing heavily from José Liras, Packard listed the coursework that existed at the beginning of the occupation. The courses for Elementary Level Primary School instruction, which he included in his study, follow the same structure that had existed under the Spanish for over six decades. Earlier plans of education from the 1840s and 1860s contain very similar courses.

What is congruent throughout all of them is that the first two courses listed in all of the plans were the same, Christine Doctrine and Sacred History, showing the power that the church had in education under the Spanish.

During the tenure of the Spanish Crown over the education system of Cuba, the control over the legal aspect of education was plainly evident. The initial development of Plans of Education in Spain did not transfer lock-stock-and-barrel to Cuba. Often, regulations that gave local control over decisions such as textbook selection and the hiring of teachers did not transfer to the island. Instead, the Captains General of the island utilized the control over the decisions regarding education to adapt Cuba to a more religious oriented society and away from a secular and independence focused people.

As the U.S. Occupational Government gathered more control over the legal system, shifting it from Cannon law, to Case law and the English system, their control over what was being taught increased. From July 17, 1898 until December 31, 1898, the Spanish were the official, if not the actual, force in control of the island and as such the law created during their tenure was in effect. This included the school laws and plans of education that were utilized by the Spanish to manage the schools of the island. This condition did not change until December 6, 1899 with the publishing of Military Order No. 226 by Alexis Everett Frye.

The initial attempts at the introduction of new plans of education in Santiago and in Cienfuegos followed more or less, along the lines of the existing Spanish organizational structure and coursework, with several important omissions. Captain Small in Cienfuegos had few suggestions regarding the reorganization of the school law in his report, although he did state that the system needed a complete restructuring. Instead of reforming the school laws, he focused his efforts on the coursework that was to be taught.

Small's proposal in the report was to institute a school system where the "sole object held in view in these recommendations is to constitute a system that will lead to a general enlargement of intelligent citizenship in these communities" (Small, 1899a, p. 3). An artifact of the early efforts towards reforming the schools was the numerous individual efforts simultaneously underway across the island. While Small was working on his School Plan for Mantanzas province, Wood's Board of Education Plan from Santiago was already completed and sitting in General Brooke's office. However, while Wood's plan sat without action, Small's plan appears to have been instituted, at least in Cienfuegos. The reason this occurred is more than likely due to the target of the report. In Small's case his report was sent to Provincial Commander General John C. Bates on February 25th, 1899 (Small, 1899a). Without any indication that the report proceeded any further up the chain of command, Bates apparently approved the restructuring Captain Small proposed. Prior to the introduction of the new Plan of Education, the leaders of Cienfuegos negotiated several provisions of the law with the Provincial Superintendent of Schools for Mantanzas, Captain Small.

Through the bargaining between the two parties, an agreement acceptable to both was achieved, and by April 5th, 1899 principals and assistants were being assigned to the different schools in the city (Small, 1899b). On the 3rd of May the school law was accepted and a copy handwritten in Spanish was forwarded to the Provincial Superintendent of Schools (Malaret & Ayala, 1899). The fairly rapid introduction of this school law came about due to the desire of both parties to work together to place the schools back in operation. Despite Captain Small's apparent view of the Cuban people as inferior to those of the U.S., he negotiated with the *alcalde* and *ayuntamiento* of Cienfuegos and was able to institute the majority of his plan. This placed

the U.S. occupational Government in control of the education system in that province months before it was achieved elsewhere on the island.

Alexis Frye released the first comprehensive school law for the island on December 6, 1899 under the command of Governor-General Brooke. The new law was released less than one month following Frye's arrival on the island. It was only two weeks old when Wood was placed in Command of Cuba on December 20, 1899. Untried and untested Wood had little confidence that Frye's School Law would be successful. In a little over two months, the School Law released as Military Order No. 226 developed its first of several problems. Wood acted swiftly to stem the flood of dollars the legal loophole had created, causing his first public rift with Frye. As the weeks progressed and Wood was able to recognize the weaknesses in the existing series of regulations known as Military Order No. 226, he commanded Lieutenant Matthew Hanna to draft a new law for the schools of the island. What Wood was mostly concerned about regarding Frye's series of regulations was a lack of legal structure that clearly placed the U.S. Government in absolute control over the schools of Cuba.

He was further convinced of the lack of operational control when Frye published his *Manual Para Maestros*. This book, intended as a methods manual for the teachers of Cuba who had little knowledge regarding how to teach also contained the island's first official course of studies under the U.S. Occupational Government. The passage that concerned Wood the most was the initial paragraphs that Frye included in the introduction. Frye stated that he was in support of freedom in the employment of any of his suggested methods of instruction. Since this was contrary to the perspective of Wood and removed the locus of control from the U.S. Governor-General regarding control over the schools, the Governor immediately began to

investigate methods of regaining that control. He did this by eventually eliminating Frye as the source of future school laws.

Hanna's School Law, Civil Order No. 279 and the later one that incorporated several revisions, No. 368, firmly established the U.S. Governor-General as the controlling force behind the schools. Although there was a Cuban in charge as the Secretary of Public Instruction, and another Cuban-by-desire as the Superintendent of Public Schools, Hanna's law had weakened both offices, redirecting legal control over the schools to a new office, the Commissioner of Public Schools. Once the initial Commissioner of Public Schools resigned due to health, Wood appointed his loyal Aide de Camp, Matthew Hanna, to the post of Commissioner. This transition placed Wood in total control over the management and the distribution of funds for the schools of Cuba. The only powers that remained for the Superintendent's and Secretary's offices were the development of curricula for the schools and the collection of data stipulated by the new School Law (Wood, 1900f).

The control of what was legal in the education plan for the schools was the true power of education in every aspect. If a society wishes to instruct their students in the practical arts needed for manual labor and ignore the finer aspects of society, what emerges is a society of workers. Had the choice gone in the opposite direction, then there would be a people schooled in the fine arts and higher levels of thought. Varona directly speaks to this in a passage of his annual report regarding the degrees issued from the University of Havana:

The university consisted of five faculties, namely: Philosophy and letters, sciences, law, medicine, and pharmacy. The first two were of no practical utility, and as centers of high culture were of little importance. Very few, if any, of the men who have excelled in Cuba in letters and sciences came from its halls. The other three faculties have showered

the title of lawyer, doctor, and chemist upon thrice as many individuals of the kind as our population needed. They have done their share towards mental faculties which, if well directed, might have served social progress. (Wood, 1901a, p. 58)

Varona understood that the importance was in having control over the legality of the system, not just what was taught. Through the control of the management of the school structure, courses could be dropped, requirements for graduation changed, examinations could be put in place for teachers and professors, and Chairs in the University could be removed or added to as the needs changed. The power of structural management was what Wood sought from Santiago and it is what Hanna eventually built for him in Havana, unfortunately, by the time it had arrived, Wood's fear from a year earlier had come to pass, the focus of the White House had changed, and the pursuit of Cuban annexation had changed course.

Despite Captain Small's relatively tiny area of control on the island, he was able to retain legal control over the province's schools. He accomplished this through a quick introduction of the school law and a negotiated settlement with the local authorities. Time was on his side since the process took place in the first months following the transfer of control from Spain to the U.S. Wood, on the other hand, was stymied in his efforts due to the time-lag between the transfer of control over the island from Spain on January 1, 1899 and the final introduction of Civil Order No.279 on June 30, 1900. During the intervening year and a half from transfer, the Cuban people had begun to chafe under what they perceived was a heavy-handed U.S. presence. While both processes sought the same end, Small was successful retaining the control over the legality of the school laws while Wood was only marginally in control. Simply due to the difference in time and the events that had taken place between January of 1899 and June of 1900.

The delay associated with the development of a new system of education for Cuba was attributable to several aspects of the personalities of the actors involved in the situation. Once the barriers had been removed and Wood began to implement change, additional difficulty emerged in the personage of Alexis Frye. In question 2 below, I explore the personalities that emerged in the influential actors and how this aspect affected the introduction of the changed school law for Cuba.

Discussion of Question 2: Persons and Personalities

Who were the influential actors involved in creating the schools and curricula in Cuba after the Cuban War for Independence?

The inclusion of this question provided an excellent opportunity to explore not only the individuals who influenced the creation of the schools and curricula, but also to examine their actions as integral components of the restructuring process. In chapter four I presented six individuals through the work that they performed in the reconstruction of the schools of Cuba. In that review a good deal of their individual perspective regarding annexation emerged. In this chapter I discuss the results of their actions and interactions as they related to the development of the school laws.

The six men who were examined in chapter four all came from unique backgrounds, only one of which included prior superintendence of schools. Three of the men were civilians, two of whom had previous academic experience, one as an author and a professor at a university, the other as a school teacher, author and school superintendent. The one with experience as a superintendent was Alexis Frye who had worked in California as the Superintendent of Public Schools in San Bernardino, California (Goodwin, 1900). The university professor was José Varona who had previous experience as the Chair of Philosophy at the University of Havana. Of

the remaining four, three were military officers and one a well-known lawyer and insurrectionist. José Lanuza had a well-earned reputation as an excellent jurist, had recently been elected to the Supreme Court of Cuba, had previously served in the judicial section of the insurrectionist government in New York during the war, and it was thought that “his prominent social rank will render him a welcome factor in the administration of the city’s affairs” (Reno, 1899, p. 321). While Lanuza seemed perfectly suited for the administration of the reorganization of the legal system of Cuba, his lack of education experience made him a poor choice to restructure the schools of the island. The remaining three officers included two Brigadier-Generals and one Lieutenant. John Ruller (or Rutter) Brooke was a Regular Army officer who had made his way through the ranks and found himself in charge of the military contingent occupying Puerto Rico following the cessation of hostilities with Spain. Accustomed to taking orders and keeping a low profile, Brooke was a methodical worker who made few rash decisions and planned out his course of action thoroughly prior to taking action.

Leonard Wood was a Volunteer Army officer who had begun his service as a contract doctor for the military in the southwest of the United States. Earning the Medal of Honor for his heroic actions to support a troop of regulars who had lost their officer during the campaign against the Apache, Wood was a Captain assigned to Washington, D.C. when the war with Spain occurred (McCallum, 2006). Together with his friend and confidant Theodore Roosevelt, Wood organized and helped train the Rough Riders. During the successful intervention in Santiago, Wood earned a battlefield promotion to Brigadier-General (and Roosevelt to Colonel), the rank he held at the close of the conflict (McCallum, 2006).

Lieutenant Matthew Hanna was the least conspicuous of the six at the beginning of his service in Cuba. Hanna had joined the regular Army in 1897 with the rank of 2nd Lieutenant

assigned to Troop M (Army Navy Journal, 1897, July 31). Before joining the military, Hanna had taught school in Ohio for four years and along with Frye and Varona were the only of the group with classroom experience. During his time in Cuba, Hanna rose from Aide de Camp for Wood to the Commissioner of Public Schools, a position created he created on June 30, 1900 in Civil Order No. 279.

These six men could not have been more different and yet all were involved directly in the reform of the Cuban education system during the period of U.S occupation. Much of what occurred, and did not occur, was due to the individual skills and personalities that these men harbored. Their views on annexation and independence for Cuba were often diametrically opposed, however for the majority of the time they found ways to work together. Four of the men were from the U.S and two were native born Cubans. However, both of these men had spent the years preceding and during the War in New York, and were therefore familiar with the culture and teaching methods of the U.S.

Appointed to the position of Secretary of Justice and Public Instruction, José Lanuza served in that position from January 31st, 1899 up through November 2nd of that same year. During his time engaged by the U.S. Occupational Government Lanuza worked diligently to restructure the laws of Cuba and eventually found some time to begin the restructuring of the University of Havana. He had little contact with the majority of the other five influential individuals with the exception of Governor-General Brooke. Much of his work, the case could be made for almost the entirety of it, was focused on reconfiguring the legal system of Cuba from Spanish Cannon Law to English Case Law. Unfortunately for Lanuza his efforts to rapidly reform both the legal system and the schools of the island were stymied by one of Brooke's first directives. According to Lanuza in his Annual Report dated September 16, 1899, his first

intention was to reorganize the old departments. However, due to the missive from Brooke that “warned me that said organization had to be carried out with the greatest economy possible,” the work was slowed right from the start.

This insistence of Brooke’s to economize in the reconstruction efforts does not appear as a directive from the Chief of Staff of the Army, General Shafter, nor does it look as if it originated from the White House. Despite its true origin, the pursuit of economy delayed the reconstruction efforts and more likely than not aided the efforts of the Cuban factions seeking independence. Lanuza’s energies towards the school system were also guided by the underlying concept of economizing, which again contributed to the anger directed towards the Occupational Government. This was perhaps Brooke’s biggest misstep as the Governor-General of Cuba. By attempting to economize the process of reconstruction from the start, he appeared as another Captains General, just one from a different country and wearing a new uniform.

Of the three major changes enacted at the beginning of Lanuza’s term as the Secretary of Justice and Public Instruction, all in one way or another were focused on cost saving. The ending of the teacher pensions occurred due to the cost associated, and the reduction of the staff from that division. Brooke had taken the perspective that the debt associated with the teacher pensions was one owned by the old caretakers of the island, the Spanish. Consequently he saw little need for the extensive pension department that had been a part of the Bureau of Pensions and Retired Pay. This was the first area that Lanuza consolidated. Once the regulation was issued cancelling teacher pensions, he was able to close down the pension office. Lanuza next closed the Normal Schools across the island, casting those who were attending the schools into a sort of limbo regarding their futures as teachers. And finally, Lanuza attacked the institution of *Jubilación*, turning the academic world of the university on end.

Each of these cost-saving measures was backed by seemingly sound principles; however, they also upended historical processes that were a part of the culture of education on the island. Lanuza, who was a part of the legal community and not entrenched in the academic world, had little compunction against instituting the cost saving measures, since he did not have an insider's perspective of the education system of Cuba. While these redactions from the overall school system process had little direct impact on the creation of new schools and the restarting of the education system of Cuba, they did begin the process of mistrust that accompanies the change of traditional parts of a system. This was especially true since each of these changes came from his office without warning and was simply announced as a *fait accompli*.

Although Lanuza may not have been aware of the impact he made regarding allegiance to the new system of government on the island, he had initiated the mistrust from the teachers that emerged later in Brooke's tenure as Governor-General. In the review of Lanuza's Annual Report there are few references to the Governor-General. The entirety of the work appears to have been originated from within the confines of his department with little discussion between the Secretary and the Governor-General. While unusual for Lanuza, this was typical for a Regular Army officer who was use to delegating assignments and not being involved in the practical aspects of implementation.

John Brooke, by all accounts, was a methodical and practiced Regular Army officer. Accustomed to following orders, Brooke, during his time as Governor-General of Cuba, made few original initiatives. Instead he followed a path that was established for him by directives from his superiors. Instructed under General Order No. 184 to take command of the island in the position of Governor-General, Brooke immediately set to work to develop his senior staff. In the days leading up to the official transfer ceremony, General Ludlow, who was in command of the

city of Havana informed the Governor-General that a large contingent of the Cuban Army desired to be present at the event. In one of his first acts as Governor-General, Brooke denied the request of the Cuban soldiers to witness the historic event citing the potential danger to life and property as being too great to allow the soldiers into the city. He commented in his Annual Report dated October 1, 1899, that he informed General Ludlow “that the celebration must be postponed to a time when the excitement had cooled off and the passions of the people could be under control” (Brooke, 1900, p. 7). This mistake haunted the Governor in his relationship with the Cuban military during the remainder of his time in Cuba, and did little to engender their support or dispel their suspicion of the U.S. Occupational Government’s intent in Cuba.

Brooke’s initial actions to reduce the cost of the occupation appear to originate without much forethought other than one of economy. Instituted quickly after taking control of the island, Brooke realigned the six historic divisions in the government to four departments. His lumping together of the Justice and Public Instruction departments was briefly discussed above and led to a slow start for the beginning of reform efforts in the schools. A second major realignment came in the department of agriculture, commerce, industries, and public works. In Brooke’s perspective, all of these agencies had to do with commercial ventures, and therefore should be under the control of one office. Unfortunately for Cuba, this restructuring of the four different agencies under one titular head spelled disaster for the rebuilding efforts for the department of Public Works. The one department that did not receive any ministrations directed at restructuring efforts was the Department of Finance. One conclusion that can be drawn from this rapid reorganization is that it was not based on the needs of rebuilding the island; instead, it appears to have been a focus entirely on cost saving measures. For Brooke to have initiated these changes within weeks of his arriving in Cuba speaks to his lack of cultural knowledge of

the island and more to his attempt to instill efficiency in the system of government that matched what he was familiar with in the U.S. This perspective appears to be on target with what José Varona stated in his first Annual Report to Governor-General Wood.

From a review of the Annual Reports and the few letters that remain in the National Archives relative to his time in Cuba, Brooke appeared resigned to his assignment on the island, rather than excited by the opportunity. His reports read more as a listing of systems in various stages of repair, rather than how each of these changes affected the people of the island. The reaction he had to most of the initiatives offered by his subordinates was one of disinterest as was indicated by his lack of action on the Board of Santiago report from January 25, 1899 and his shelving of the School Law that originated with Secretary Lanuza. Despite his military efficiency, and perhaps due to it, he appears to be out of step with what was occurring to the population on the island. One indication was this assessment of the current agricultural conditions in his report from October 1, 1899:

In fact, the era of prosperity appears to be at hand; all that is needed is to have capital satisfied as to the future conditions, and this being reasonably assured, there can be no doubt but that the fertility of the soil and the industry of the people will work out a happy solution of the problem. (Brooke, 1900, p. 14)

The disconnect that existed in Brooke's assessment was indicative of his lack of comprehension of the great need that was still felt in all sectors of the island's economy.

Brooke did not appear to be in favor of annexation, instead he was determined to follow the constructs of the Joint Resolution of Congress to stabilize the island, assist in the formation of a new government, and then leave the Cuban people to their own devices. His lack of action on many features that needed attention on the island led to his rift with General Wood, who he

viewed as an upstart, having received his battlefield commission to General six short months earlier. Brooke was also not fond of the Volunteer Army's propensity to publish reports of their exploits on the battlefield. As did many Regular Army of his time, he viewed these actions as unseemly behaviors, not fitting the actions of a line-officer. Brooke's disagreements with Wood, and his lack of action to institute the needed corrections on the island, led to his eventual reassignment and the ascendancy of General Wood to the post of Governor of Cuba.

The inclusion of José Varona into the Occupational Government was one of the initial acts of General Wood. After requesting and accepting the resignations of all of the Department Secretaries, Wood reconfigured the departments back to a system that was familiar to the Cuban people. Following the reorganization of the structure he appointed new men to the command positions in each department. José Varona was initially appointed to be the Secretary of Finance, an office that had a great deal of power in the transitional government. Varona was an interesting selection for this position as he was not a financial specialist. Instead, Varona had the majority of his experience in education, particularly in the area of philosophy. Placing a philosophy professor at the helm of a financial department was a clear risk for Wood, however little change was made that negatively impacted the island's economy during his tenure. When Wood's Secretary of Public Instruction resigned for health reasons, Wood shifted Varona to a position he was better qualified to manage. Once in his element, Varona began to impact change upon the struggling education system.

Not very impressed with the school law written by Alexis Frye, or the course of studies included in his *Manual para Maestros*, Varona met with Wood shortly after the reassignment. The gist of their discussion on May 13, 1900 was the development of a new course of studies and a restructuring of the management system for the *segunda enseñanzas* on the island. Having

recently commissioned his Aide de Camp Lieutenant Matthew Hanna to draft a new school law, Wood must have been delighted by his new Secretary's suggestion. Within six weeks' time Varona rolled out the new plans for the high schools on the island. Incorporated into the new School Law published under Civil Order No. 279, the improvements to the *segunda enseñanza* level were designed to formalize a path between Primary education and the University.

Not satisfied to rest on his laurels, Varona next confronted the hallowed halls of the University of Havana. Declaring that nothing original had emerged from the university in the area of research, Varona gutted the bloated institution by ending the tenure of all of the professors, restructured the faculties from six to three and reducing the number of colleges to twelve (Wood, 1900f). Once this was completed he rehired the professorate through a comprehensive and competitive examination based process. The rapid process with which Varona managed these two tasks speaks to his deep understanding of the education system on the island, one that was apparently missing in Alexis Frye.

Passionate is the first word that comes to mind when reviewing the writings of Alexis Everett Frye from Cuba. This emotion is evident from the start of his interest in gaining entry to the Army to fight the Spanish in the Philippines, and exists in the heartfelt letter to the Cuban people he wrote in December of 1900. His response to Elihu Root's testimony in the Wood hearings was packed full of emotion with clear evidence of his passion for the island of Cuba and the Cuban people. However, his passion was what eventually led to his undoing as he was ensconced in a group of military individuals who were much more practical than emotive.

Frye's arrival on the island came at a time of great controversy. His immediate supervisor, Governor-General John Brooke was soon to be relieved of his command due to the perception that nothing was occurring regarding the restructuring of the island's school system

and a lack of progress in many other areas. Brooke's main antagonist in this struggle was General Leonard Wood, the provincial commander of Santiago de Cuba. Walking into a hornet's nest of controversy, Brooke put Frye to work immediately crafting a new school law. So rapid is Frye's appointment that Brooke did not establish a clear set of regulations concerning the newly created office of Superintendent of Public Schools before he placed Frye into the position. Due to this error, Frye began his time in Cuba with almost limitless authority over the school system of Cuba. Lanuza was apparently all too happy to relinquish control over anything related to education and ignored Frye's arrival.

Frye jumped right in to the work and quickly published a new School Law thirty four days following his arrival on the island. Focused more on the structure of the schools than on coursework, Frye's Military Order No. 226 established, for the first time under U.S. occupation, a system for the creation of schools and the reporting structure necessary to manage that system. However the haste that crafted the system soon became evident in the difficulty the local boards of education had in interpreting the new laws. Drafted at the beginning of his time on the island, Frye had a Northerner's perspective of education and little understanding of the culture of the Cuban people. Due to the concentrated effort that was required to draft the law, Frye rarely left the Palace in Havana, and relied on his Cuban assistants to inform him regarding the transfer of intellectual concepts from Spanish and the translation needed to review Spanish documents.

Released on December 6th, 1899 under the command of General Brooke, parts of Frye's new School Law were shuttered on March 3rd, by his new boss, Governor-General Leonard Wood. Reacting with the passion he was typical of, Frye demanded that the order restricting the creation of new schools be lifted immediately. On March 8th, 1900 he began a letter writing campaign to the Governor-General that showed how far and how fast their relationship had

fallen. Frye's emerging passion for the Cuban people was evident in this first letter where he pleads with the Governor to pay the school teachers of Cuba (Frye, 1904). Frye did not stop with letters to the Governor-General, he also wrote to Elihu Root, Secretary of War for President McKinley, complaining of the actions of the Governor regarding the pay of Cuban teachers. On several additional occasions, Frye elevated, what to all intents was a normal situation, to one that required intervention by higher authorities. Problems prior to and during the transfer of Cuban school teachers for summer instruction to Harvard led to an intervention in the form of letters from the Secretary of War and a rapid response by Governor Wood. The typical cause of the problem was Frye's overreaction to some perceived slight or injustice upon the Cuban teachers. The contention that built between the passionate civilian and temperamental military officer led eventually to Frye's resignation from the post of Superintendent of Public Schools of Cuba.

What caused much of the hostility between Frye and Wood was the drift of Frye towards supporting the independence of Cuba, and Wood's ardent work towards annexation of the island. The one event that is indicative of Frye's passionate embrace of the Cuban culture was his reaction on the deck of the U.S.S. Sedgwick. Disgusted by the treatment the female teachers were receiving at the hands of the Sedgwick's Quartermaster who was delaying their placement in cabins, Frye began to perform the Quartermaster's duties and assigned rooms to the distressed teachers under his care. Following a brief verbal discussion that quickly elevated to a physical altercation, Frye knocked the ill-mannered Quartermaster to the deck of the ship, earning the admiration of the female teachers and the ire of the ship's crew (Angulo, 2012). This event is emblematic of Frye's acceptance of the Cuban culture over that of his native land. Upon his return to Cuba following a successful voyage to Cambridge, Frye was overwrought with the

changes underway to the regulation that he had produced, and feeling isolated from the decision making process, attempted to resign.

Convinced to stay on as the Superintendent of Schools by Wood, Frye produced two final pieces of legislation, the long awaited teacher examination regulation, and a circular to solicit textbooks for use in the schools. In neither case was the regulation firm in presentation, but instead follow the typical Frye method of extensive explanation with little substance. The solicitation of textbooks produced a selection of mostly U.S. published works, with few, if any, Cuban submissions. The teacher examinations were finally scheduled for the following February, but were eventually rescheduled for the summer of 1901. Prior to leaving the island, Frye married a Cuban school teacher he met on the trip to Harvard on the first of January 1901 and then resigned on January 8th, of that same year, leaving Cuba with his new bride, as a converted Cuban-American.

Leonard Wood and Matthew Hanna could almost be spoken about in the same voice once the younger officer had spent a few months in the employ of his superior officer. By the end of his tenure on Cuba, Hanna's reports read very similar to those of the General. Both men are detail oriented with Wood more of a big picture man and Hanna more of the behind the scenes number cruncher. Both men were self-promoters having written articles for stateside newspapers and magazines about their exploits in Cuba and the future of the island. Hanna does not appear as ambitious as Wood at first, satisfied with the behind the scenes support work. However, once he is placed into the position of the Acting Commissioner of Public Schools, a new Hanna emerges.

A former teacher in the Ohio school system, Hanna joined the regular Army and was commissioned a 2nd Lieutenant in 1897. He joined Wood's entourage in Santiago as an Aide de

Camp and stayed with the General as he rose up to be the Governor of the Island. His experience as a teacher in Ohio had familiarized him with the school law of that state, which he used to create a new School Law for Cuba. Working in minor roles for Wood for over a year, Hanna was finally able to showcase his skills to the General in June of 1900. The reconstruction of the School Law under Civil Order No. 279 was not without problems, some that Hanna readily admits in his Annual Report; however, it was unquestionably much better than the preceding regulation.

Having plugged along in the background in Wood's command, Hanna took advantage of the opportunity to draft the new law and then fill the position that he had created as the Commissioner of Public Schools when the first Commissioner resigned. Up through the middle of May in 1902, Hanna held the position of Commissioner of Public Schools and due to his close relationship with Wood was able to adjust regulations as needed to support the needs of the school system. His relaxed demeanor had disappeared by the time he left Cuba, replaced by a brusquer style, however, it was his ability to communicate with General Wood that made him the longest tenured official in the Cuban school system under the Occupational Government.

One of the more maligned individuals associated with the Cuban occupation of 1898 to 1902, Governor-General Leonard Wood was also its most prolific. Under his leadership the school system of Cuba was realigned, schools were opened, a structure to manage them was put in place, Summer Normal Schools were reopened, teacher salaries were normalized, textbooks purchased, the University of Havana reorganized, and secondary schools were reopened. While Wood did little of the actual work to introduce these changes, his leadership style and focused direction, allowed for the completion of several projects that had been in the planning stages for

over a year. A hard charging, get it done attitude exemplified Wood's behavior in Cuba, and it was one that several of his subordinates emulated, most evidently Matthew Hanna.

As a firm adherent to the annexation of Cuba, Wood worked from the time he arrived in Cuba until he was redirected by Elihu Root to other concerns, with one singular focus: annex the island in any way possible. Recognizing the restrictions put in place by the Teller Amendment, Wood examined options to circumvent the legislation. Aware that education of the population would provide an avenue to a change in the culture of the island, Wood settled by December of 1898 on a plan to reconstruct the island's school system to one that matched that existing in the U.S. Despite the setbacks and lack of action by his superior officer General Brooke, Wood pushed ahead on all fronts. Building a case against Brooke, Wood took advantage of every opportunity to promote himself whenever the opportunity presented itself. In addition, Wood developed his political support in Washington, utilizing his friends to lobby for his promotion. By December of 1899, Elihu Root made his decision and relieved Brooke of the command of Cuba and appointed Wood as the Governor-General of the island.

During the almost four years of U.S. occupation of the island a concerted effort was underway to annex the island. Led by factions in the U.S. Government and abetted by political and business groups on the island and back in the U.S., the movement to encompass the island under U.S. control directed many of the actions in the governing of Cuba. However, due to the differing ideologies and personalities of the influential actors involved, little headway was made regarding the eventual goal. While laws were changed, systems reconstructed, schools reopened, new courses of study that included English and Civics instruction added, and teachers instructed in the latest stateside methods of teaching, the schools remained for the most part Cuban. The skill of the men involved in the process of recreating the schools of the island came from

differing perspectives on what should be done and with skillsets that often were not sufficient for the task ahead of them. In addition, due to early mistakes and missteps that were the result of a lack of cultural awareness, changes were instituted and then reformed again to overcome the new problems the first law had created. By the end of the U.S. occupation in 1902 and through the second intervention of 1906-1908, the schools of the island stayed under the influence of these original developers (MaGoon, 1908, p. 321). Not until 1912 when Salvador Massip called for the reform of the schools again, did any change begin anew. While the intent of the reformation may have been to force an “Americanization” of the students, what occurred instead was the rise of a militant teacher class intent on the creation of a truly Cuban school system (MaGoon, 1908).

Discussion of Question 3: Cultural Adaptations

Did the U.S. try to influence the Cuba education system after the Cuban War for Independence?

If so, in what ways?

In this section I was interested in the cultural adaptations that were attempted by the U.S. introduction of changes to the Cuban education system. Since culture is essentially a collection of engrained behaviors, modification of even the simplest aspects of a culture can have far reaching effects on a people. For example, we wake each day based on the cultural expectation that we go to work in the morning and arrive home in the evening. If suddenly we are told that our job has changed to a noon start time, our internal behavior process resists the change. We still rise at 6:00 am to shower, eat breakfast, and then sit around waiting to go to work at noon. By 5:00 pm we are ready to leave, despite the fact that we have three more hours to go. It is the adaptations similar to this that I was interested in observing in the reworking of the Cuban system.

One example that I observed was the change in the school year. The adaptation from a year round school to one that was closed during the summer months altered in a significant manner the habits of the families. Students were not in school during the months when they were not needed for specific chores, and were more than likely in class when they were needed at home or on the farm. The adjustment of the school calendar to match that of the U.S. strained cultural habits.

A second adjustment was the school day. As discussed above, the adjustment of the start or end time of a cultural event can often present chaotic responses and even endanger individuals who are accustomed to a specific schedule. By adapting the Cuban schedule to match that existing in the U.S.; the school officials ignored the daily eating and resting habits of the Cuban people. Schools typically began early and were released for a two hour lunch. This allowed students to return home and eat a meal with their parents, relax, and then return for an afternoon of work. This process mirrored the work schedules their parents followed daily and prepared them indirectly for the adult life experience. By adjusting the daily school time, the school officials indirectly put pressure on the businesses to adapt their schedule to that of the school. If they chose to stay with the existing schedule, parents would not be able to eat with their children, or walk with them to and from school. The adjustment also would change the expectation of the children to a schedule that was not consistent with local work practices.

The removal of religious holidays was a large cultural adaptation as the vast majority of the people on the island followed the Catholic faith. The annual cycle of religious holidays had been followed for centuries in the families and for decades in the schools. By ignoring the religious holidays, the schools put the parents and students in opposition with their faith. Either they could miss school and adhere to the tenets of the Church, or ignore their faith and attend

school during a day of religious importance. In addition the elimination of holidays that hold special significance such as Three Kings Day (January 6th), the traditional day of Christmas gift-giving in Cuba, forced the children and their parents to choose between a culturally significant event and adherence to the law. Finally, the introduction of secular uniquely American holidays such as Washington's Birthday, Thanksgiving, and the Fourth of July without a cultural context suggests that the control over which days are important was up to the Occupational Government.

The control over the official language of daily interaction is a powerful tool for control over a people. It is even more pernicious to utilize textbooks in a school that use a foreign language as the main means of transmitting ideas and meaning behind intellectual concepts to children. By placing the native language in an inferior position, the student learns that their natural language is not beneficial for the transmission of intellectual information.

The introduction of textbooks from the U.S. despite the fact that they were either written entirely in English or had been poorly translated to Spanish was a major influence on the Cuban student. In the English-only versions, students struggled to understand the concepts even when there were pictures to assist in the comprehension. For example, many of the books were written specifically for areas where snow existed and sleds were used and well known to the students. The use of snow to depict a cold day was something about which the Cuban student would have little knowledge.

Under the U.S. School Laws in Cuba, what was not taught was as important as what was. Gone from all of the U.S. regulation was any reference to Spain, or the Castilian version of the Spanish language, so too was the geography and history of Spain. Instead, the history of Cuba and the Americas was instituted along with English grammar. However, the most important omission under the U.S. was the removal of religion from the classroom. The teaching of

Christian Doctrine, Morals, and Sacred History had been included in the school laws for Cuba from 1844 forward. The church had been an integral part of the island's culture from the very beginning. Local priests had risen, during the 19th century, to a kind of quasi-government office with control over how certain courses were taught, and which textbooks were selected for use in the schools. In addition, they often had a voice in who was attending the school due to the power granted to them to authorize poverty and hardship admission to the public schools on the island. The sudden removal of the priests and the religious coursework put a spotlight on the diminished power of the Catholic Church in the decision making process for the schools of the island. In addition, the vacuum created by the removal of the Church opened the door for new actors to enter.

The new course that was instituted to replace what was taught under Christian Doctrine and Morals was Civics. Civics courses were a fairly recent addition under U.S. plans of education, and were designed to reinforce the structure of citizenship in a democratic country. The introduction of civics courses redirected the moral decision making process from one based on religion to one based on egalitarianism and a social contract.

The choice of which type of government had been preordained for the Cuban people; the introduction of civics instruction hammered home the choice through the education of children who would eventually grow to adulthood. Taking into consideration the system of government selected for the Cuban people was a republic, the introduction of civics courses designed to introduce the concepts of self-rule was a positive step. The concern arises in what was taught regarding the government processes. The introduction of the School City appears at first to be a positive influence on the children in the schools where it was instituted. However, when the comments of the Principals are analyzed, they are remarking on the improvement of behavior

and discipline of the students. In effect for the students, they are learning how to behave, rather than how to manage a city or state. Although Lincoln de Zayas (MaGoon, 1908) lauds the system he is also speaking of the improvement in discipline rather than an increase in the knowledge of the governmental processes. While this process may have held promise in the U.S. where a history of a democratic government has long been in existence, to introduce this system into Cuba where the understanding of the democratic processes was in its infancy gave no direct benefit to the country.

Conclusion

The purpose of this study was to examine and analyze the first direct, sustained contact between the U.S. and Cuban education systems that occurred following the conclusion of the Cuban War of Independence and the Spanish American War. To this end I was desirous to learn what courses were taught under the U.S. Occupation, who was involved in the recreation of the school system, and what influences were brought to bear on the Cuban culture. Following my research I believe that these questions have been answered substantially. While there is always area for future research, the examination of this topic has been thorough and in-depth, examining official reports and documents from the National Archives of the U.S. and those contained in various libraries in Cuba and the United States. In addition to these resources, international libraries were accessed online and private libraries both in Cuba and at the Franklin Institute were reviewed to further develop the needed scholarship for this study.

Regarding the first question, a clear course of studies was established during the occupation by the U.S. Occupational Government. Following the knowledge that the coursework utilized during the occupation would be controlled by the school law established by the Occupational Government I examined the school laws and ancillary regulations for a

determination of the established course of studies. This process proved fruitful as numerous reports contained regulations regarding the development of the schools and school laws. From this research I was able to ascertain that on two occasions prior to the introduction to a national school law, provincial officials established coursework that was instituted into the schools underway at those times. The details of these plans of study are included in the data presented above in Chapter four. Subsequently I uncovered the first National School Law that was instituted, including the coursework that quickly followed in a manual designed to impart modern teaching methods to the teachers of Cuba. With the introduction of the final school law on June 30, 1900, a course of studies for the secondary schools of the island was also introduced. During this same time period, the structure of courses to be taught at the University of Havana was also established. The evidence collected from the period 1898 to 1902 was reinforced by reports from 1908 that indicate that the school law of 1900 was still in effect at that time and that the course of studies was still in effect. The coursework for the secondary schools was maintained in effect until the mid-1940 when it was replaced by a new five year plan. To determine the perspectives utilized in the development of the coursework, I investigated the individuals involved in their selection (see below). Through this combined analysis I was able to gain insight into the views each of the men involved held regarding the coursework. The results of my inquiry were satisfied by the resultant research and I assert that this question has been fully informed as it pertains to public schools underway in Cuba at that time.

In order to ascertain the more influential actors involved in the creation of the schools, I relied on the authors of the same school laws mentioned above. Due to the extensive records retained by the Military Occupational Government of Cuba during both the first and second intervention, I was able to identify who these individuals were and what impact they had on the

development of the schools. To inform this question I examined the development of the school plans as they were written in order to gain insight into the thought process behind the development of the plans. Six main actors were identified from the process with several additional in the roles of secondary players. Each of the six main actors was discussed in detail in relationship to their interactions with the plans and each other. From this comparison, a detailed insight into their political views emerged and the purpose behind the development behind the School Laws became clearer. While there is always additional information that can be gleaned through further research on each of these individuals, especially since the review was not a biographical examination, and taking into account that there may have been other individuals who were influential but not present in the reports, the current level of research has satisfied the majority of inquiry for this question.

The influence brought to bear on the Cuban education system was manifest. Everything from the development of the law to the system created on through to the requirements of enumeration and teacher selection were all part of the influence brought to bear. While this study examined the surface areas of influence as they were defined by Hall (1967), the subsurface concepts such as the adjustment of thought processes based on the introduction to new teaching methods and textbooks from the U.S. deserves further exploration as these changes may have continued on for some time post intervention. In the areas that this study intended to research, the collected information has offered good insight into the areas of influence. While this question as it had been written was satisfied to a great extent by the examination of language instruction, the inclusion of courses in civics, U.S. history, and the introduction of U.S. styled teaching methods, it is unclear if all of the areas that could have been affected in the schools

have been identified. At best, I can state that this question has been informed about the majority of the more probable areas on which influence was intended.

Unexpected findings

Entirely due to the construction of my study several areas of unexpected data emerged that will inform future research. Perhaps the most important of these was the list of 19th century plans of education introduced in Spain and in Cuba. The access to and review of these early works gave me great insight into the machinations of the school regulations under the Spanish. In addition, through a comparison between the plans I was able to discover many areas where what existed in Spain was radically changed for introduction in Cuba. This has helped inform my perspective of *Cubanidad* and the development of the Cuban psyche as it regards change. The increasing impact of the Church into the schools of Cuba can clearly be seen in these plans of educations as can the diminishing local power once held exclusively by the *Sociedad Económica de Amigos del País* in the decades prior to the introduction of the Spanish plans.

A second area of interest was the development of the different methods of instruction that were employed under the Spanish plans of education. One, developed by Joseph Lancaster (1821) known as the Monitorial System, was employed by Cuban teachers up through the introduction of the new methods used by the U.S. This low cost system of instruction was intended to provide free public education to over 1000 students at a time using a single teacher.

Within the focus of the study was a plethora of information on Wilson Gill and his association with the Franklin Institute. In 1903 Gill won the Cresson Medal from the Institute for his remarkable invention of the Gill School City. In accord with the Franklin Institute Gill introduced the School City method into eighteen schools in Philadelphia in association with the

Philadelphia School Board. Up through his death in the 1941, Gill was expounding on his system across the country introducing the School City Program in over 20 states.

One final surprise was the level of purchase that civics education had in Cuba in addition to the Gill School City method. Several courses of study included the requirement to include civics education as a part of the normal coursework. The Civics education textbook, written by Montoro in 1902, provides an introspective into the purpose of moral education and examines the rights and responsibilities of citizenship at the secondary school level. This, despite the indication from several sources, that Cuban authors were not producing textbooks in this field. In these unexpected areas some of the most interesting tidbits of information emerged that allowed me to bridge areas I otherwise would not have explored.

Unexpected omissions

Entering this study I examined a variety of scholarly work on the time period and I was especially intrigued by the work of Lynn Stoner (1991) and Teresa Prados Torreira (2005). In both of these works Cuban women of the late 19th and early 20th century are portrayed as integral parts of the revolution and the reconstruction afterwards. Unfortunately, none of the sources available in the United States or in Cuba contained references to the women who worked to recreate the school system of Cuba. The official reports rarely if ever contained reference to women from the time period, and although I examined numerous boxes of letters and personal correspondence, no women were included in these areas either. While it is understandable that during this time period many men were in positions of power, I had hoped that some of the supportive roles might have included women. To date I have been unable to discover a single Cuban or U.S. woman who was involved in the reconstruction of the Cuban schools, but I recognize that the historical record may be incomplete.

A second area that is intriguing due to his absence is references to José Martí during the period under study. While I have located some references to Martí and Lanuza being contemporaries, there is nothing written by Lanuza that would support this association or discussing his influence of Lanuza's work in the archives I reviewed. It appears that although Martí was very influential prior to and in the first months of the insurrection, his importance had waned until sometime in the early 1920's according to Emma Pérez. Surprisingly, there was no mention of Martí by any of the Cuban scholars working in this period either for the U.S. Occupational Government, or in the Cuban efforts towards school reconstruction that existed in their correspondence or the official reports. Additionally, none of the existing coursework or developed courses of study, including the textbook on morals and civics by Montoro (1902) includes any reference to Martí.

Cubanidad

Throughout the entirety of this study I have attempted to be aware of features exhibited by the population that were indicative of *Cubanidad*. To that end I have uncovered what I believe is a rarely discussed concept of *Cubanidad* that was evident in many of the areas that I have examined. The concept that I propose to include in the discussion of *Cubanidad* is that of resistance. Looking back to the beginning of Ortiz's (1949) discussion on *Cubanidad* he mentions the clash of two groups as they come together. I argue that it is the resistance that emerges during this clash that better defines what *Cubanidad* entails. The resistance that I speak of is not just a physical push back on an encroaching entity; it is also the mental resistance to the acceptance of different points of view and the almost automatic struggle with acquiescence. This could be seen as similar to what Pérez has called *independismo* or independence; however I offer

that the automatic resistance to change that is evident in many of these situations is the defense mechanism inherent in the culture of the Cuban people.

This process of resistance, as it pertains to education, appears to emerge clearly with the introduction of the first plan of education brought to the island from Spain. In this first introduction of a plan of education, the Cubans resisted the introduction of the new plan for over two years. The negotiations that ensue become an integral aspect of the struggle to resist. Essentially the resistance aspect requires a response that can be physical, but more often than not is a negotiation or vehement discussion. Over the ensuing decades the resistance to change developed into a physical opposition with the Ten Years War and eventually the Cuban War of Independence.

Between these major conflicts, the Cuban culture began to adapt a resistance to anything that did not emerge from within. This concept of within can include the physicality of the island, the culture of the Cuban people, and even the within we all contain. As the U.S. occupation began on the island, the weariness brought about by hunger and the long conflict subdued, to a part, the resistance to change and the initial introduction of change to the school law took place. This is evident in the negotiations that took place in early 1899 between Captain Samuel Small and the *alcalde* from Cienfuegos. The changes to the suggested plan were minute and inconsequential to the broader plan; however, the passive acceptance of the imposed law would have been in opposition to the sense of self-rule that the Cuban people had been fighting for over the past four decades. The negotiated settlement of district boundaries and teacher selection practices allowed a process of resistance to occur, followed by the acceptance of the negotiated solution.

Later, following several months of occupation, the Cuban teachers begin resisting in an overt manner. Notified that competitive examinations were going to be held for the teaching positions in the schools of Cuba, the teachers begin resisting the introduction of the new requirements. During the course of two years, negotiations took place that weakened the requirements to such a low level that over one thousand more teachers passed the exam than were needed to teach on the island (MaGoon, 1908).

In each case when a new concept or regulation was published or leaked out in the press, an almost methodical process was followed. First, the issue would be inflated as an affront to the Cuban culture, people, or their sensibilities. Second, the press would inflame passions regarding the issue producing articles that expounded on suppositions and half-truths. Third, representatives would petition the relevant officials for a delay or an outright elimination of the new issue, followed by a deeper explanation with minor adjustments by the School officials, and finally the acceptance of the issue. Rarely was an alternative offered to the proposed change, instead the response and effort was focused on resisting the change.

An example that clarifies this process was the introduction of the marriage law alteration in 1899. Issued under Military Order No. 66, the marriage law ended the Church's monopoly on performing marriages, requiring all marriages on the island to have a civil ceremony. The uproar at the time was led by the Catholic Church which argued that the destruction of the culture of the Cuban people was underway by the barbarous actions of the U.S. Occupational Government. Eventually, when it became clear that the law was not going to be altered, the people of the island accepted the change. However, when the law was rescinded with the introduction of Civil Order No. 307, almost the exact events occurred again in opposition to bringing back the original provisions that defined a legal marriage. This process had little to do with the issue itself as

many individuals were in support of the initial change, however the almost automatic response to change that emerged from outside of the confines of the island appear to be what was militated against.

The resistance appears to be simply that, an effort to elicit dialogue, an acknowledgement of self, a methodology of recognition that emerges automatically when change to the existing is confronted. Many of the concepts of *Cubanidad* can be further explained by the addition of the concept of resistance as this seemingly automatic response emerged in many of the conflicts over the introduction of new school methods and other laws as they were introduced on the island following the conflict.

Suggestions for future research

Five areas emerged during the course of this study as indicators for future research. All arose as areas that were not directly investigated, but were tangential to my focused area of research. The first area that needs scholarly investigation is the area of private schools on the island. Since these schools were also required under the School Law to follow the course of studies that existed for all the Public Schools, and follow the same reporting structure, a fuller picture of what was underway during the U.S. occupation would add to the scholarship on this subject. The second area is associated with the rise of the political aspect as it related to the education practices in the municipal schools. The University of Havana had previously been the locus of political activity in education; however, in the short period of time between the first intervention and the second, an intense level of political activism emerged inside of the municipal public school system. The School City Program developed by Wilson Gill was instituted in over 3600 schools on the island during the school year of 1901-1902. Despite the rave reviews given by the principals of the six schools targeted for the initial trial, little is known

about how the system progress on the island, or, if following the end of the occupation, the system was abandoned. To understand the significance of the development of citizenship in Cuban school children and the teachers this area needs further investigation.

The fourth area that requires additional investigation is the influence of Cuban women on the construction of the School Laws and Curriculum development during the period of U.S. occupation. Despite the influence documented by Stoner, (1991), Prados-Torreira (2005), and Cruz-Taura, (2008) of Cuban women actively engaged in the Cuban War of Independence, I was unable to find any direct mention or indication of influence by Cuban women in the reshaping of the schools of Cuba during the period immediately bordering the conflict. This may be due to their lack of access to the drafting of the official reports, or possibly to lost work-product undertaken by the individuals involved in this process. In order to add clarity to the creation process and identify what, if any, influence Cuban women had on the school reconstruction process, review of alternative sources utilizing feminist theories and frameworks is recommended as this process may result in different findings.

My final area of suggested research is in the area of *Cubanidad*. While not directly related to the development of the schools on the island, it is the concept of *Cubanidad* that is evident in the resistance to change exhibited by all aspects of the Cuban population to the new school system. As I stated above, this area of cultural investigation needs further examination in order to more fully understand how the development of the cultural essence of being Cuban was developed on the island. Although other areas are open for further study, it is hoped that through an investigation of these areas, the comprehension of this period of school development on the island of Cuba can be further understood.

Closing thoughts

In a rambling report from 1908, Lincoln de Zayas discussed the effect of the School Law introduced in 1900. While praising the law as “very good” he also asserted that it was a mistake to bring it to Cuba (Magoon, 1908, p. 353). In effect stated Zayas:

It was a mistake to transplant to Cuba, with its enormous proportion of illiteracy, a school law which has been slowly developed thru years and years, by the fostering care of a patriotic and cultured people.

The law is very good; but Cuba was not prepared for it. The newborn baby does not thrive on beefsteak, he has neither the teeth nor gastric juice for it, his alimentary canal is not prepared to assimilate it; and this was Cuba’s condition with respect to the School law which was put in the people’s hands; the baby was given a beefsteak. (MaGoon, 1908, p. 353)

Whether or not Cuba was ready for a comprehensive school law is debatable, what is not is that the Cuban school system was developed without much input from the scholars on the island. The comment made in 1898 by the Board of Santiago de Cuba as they were developing the school law proposal is as apropos for the totality of the attempted transformation of the school system on the island as it was then in Santiago province: That the system of education on the island of Cuba during the U.S. occupation had been run by “officials who were really aliens in the country and quite free from all responsibility to the people whose interests were entrusted to them, left everything to be desired” (House of Representatives, 1900, p. 853).

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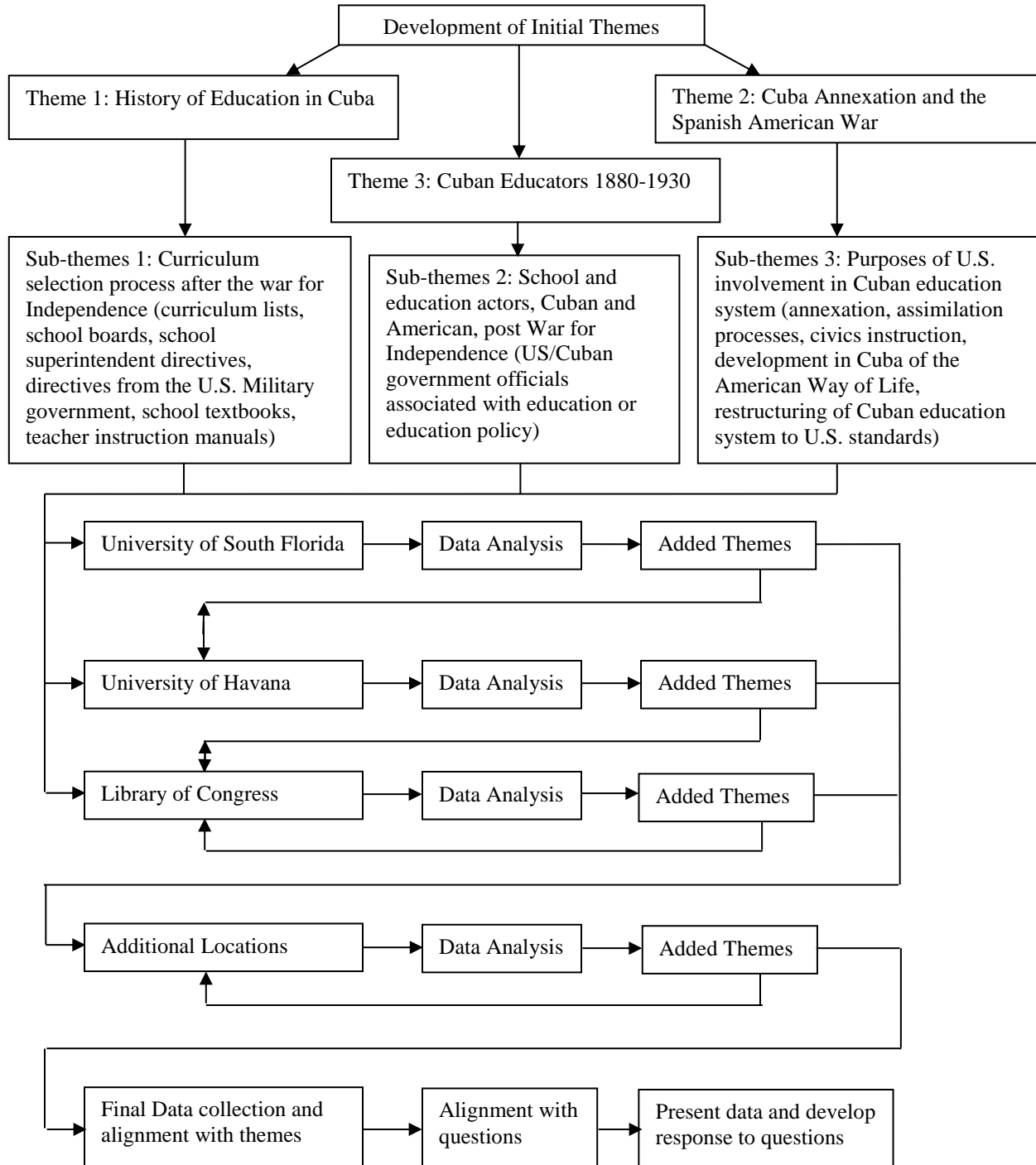
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Appendix 1

Plan of Study



Appendix 2

CHARTER OF THE SCHOOL CITY.

CHAPTER I.—OBJECT, NAME, BOUNDARY, WARDS, POWERS, RIGHTS, AND OBLIGATIONS.

ARTICLE I.—*Object.*

The object of the school city is to teach citizenship by practical means and to raise its quality to the highest standard; to increase the happiness of student life; to add effectiveness to the teacher's work; to set forth in clear relief, before the teachers and students, that there is another object of education greater than merely sharpening the wits and storing the mind with general information, which is that the individual while young shall be led to form the habit of acting toward others honestly and generously, to govern himself fearlessly and wisely always, and to use to the best educational and economic advantage time, energy, tools, and materials, for this is essential to best morals and best citizenship.

First. By engrafting into the character and habits of all its citizens that principle which is the necessary foundation of all successful popular government, that one should love his neighbor as himself, and do to others as he would have them do to him.

Second. By leading its citizens to more fully appreciate and utilize the benefits of education and other privileges of citizenship.

Third. By leading its citizens to use carefully and economically the books, supplies, and other property intrusted to them, both for the public thrift and that by means of a wholesome public spirit their characters shall be guarded from that injury to which they are made liable by their being made recipients of such free bounties.

Fourth. By training its citizens in the ordinary duties of citizenship.

Fifth. By affording instructors and students the opportunity and means to check every tendency toward wrong thinking, such as results in profane and indecent language, hazing, bullying, and other unmanly and cowardly conduct and forms of anarchy.

Sixth. By getting such good for the community as may be gained by enlisting the active cooperation of the students with the public authorities for various purposes, such as preventing the littering of the streets, the defacing of private and public property, and improving the general health and the æsthetic conditions of homes and public places.

Seventh. By relieving instructors of the police duty of school government, that their undivided attention may be given to the work of instruction and inspiration, and thereby to give them fuller opportunity to lead their students to the attainment of a higher scholarship and more noble character.

ARTICLE II.—*Name and territory.*

SEC. 1. The name of this school city shall be determined by vote of a majority of its citizens at the time they accept and ratify this charter.

SEC. 2. The territory comprising the school city shall be the buildings and grounds of the school, and the authority of the school city shall extend wherever its citizens may happen to be.

ARTICLE III.—*Wards.*

SEC. 1. The city shall be divided into as many wards and with such boundaries as shall be designated by the city council.

ARTICLE IV.—*Powers of the city.*

SEC. 1. The city shall be a body politic, with legislative, executive, and judicial powers within the bounds and in harmony with the laws of the higher political powers, subject to the approval of the principal or superintendent, who is responsible to the State for the condition of the school.

SEC. 2. The city shall have the right to nominate its citizens to office and to elect them to be officers of its government.

ARTICLE V.—*Duty of the city.*

SEC. 1. It shall be the duty of the city to maintain such order as is necessary for the best interests of the school and to secure justice to every citizen.

ARTICLE VI.—*Citizens, rights, etc.*¹

SEC. 1. Every person who is or shall hereafter become a student of this school shall be a citizen of this school city.

SEC. 2. It is the right of all citizens to attend to their duties peaceably and unmolested, and to pursue their work without interruption in any manner.

ARTICLE VII.—*Duties of citizens.*

SEC. 1. It shall be the duty of every citizen to vote on every public question where there is opportunity, to use his judgment for the good of all when voting, to put forth his best endeavors in a legal way to secure for every citizen just treatment under all circumstances, to observe the laws and assist others to observe the same, and by every reasonable means promote the well-being of every citizen and the general good of the school and of the community in which it is located.

SEC. 2. It shall be the duty of every citizen to observe the following

PRINCIPLES OF CITIZENSHIP:

“Whatsoever ye would that men should do to you, do ye even so to them,” for this is the necessary foundation of all successful popular government.

All men are created with equal right to life, liberty, and the pursuit of happiness.

Good character, truthfulness, cleanliness, industry, helpful kindness to all creatures, and civic intelligence are the basis of true citizenship.

The public, in assuming the education of children, becomes responsible to them not only for physical, industrial, mental, and moral culture but also for special training to the end that they may be most happy, useful, patriotic, intelligent, and faithful citizens while still children.

It is the duty of citizens to consecrate themselves to the service of their country, to study the history and principles of their government, to discharge faithfully all obligations of citizenship, to improve the laws and their administration, and to do all which may fulfill the ideal of the founders of their republic—a government of the people, for the people, and by the people, of equal rights for all and special privileges for none—and to the maintenance of such a government they should mutually pledge to one another their lives, their fortunes, and their sacred honor.

They should endeavor to lead others to understand, accept, and extend these principles, and to uphold and defend the institutions of their country.

CHAPTER II.—OFFICERS, NOMINATIONS, AND ELECTIONS.

ARTICLE I.—*Officers and terms.*

SEC. 1. The officers of the city shall be a mayor, city clerk, president of the city council, attorney, treasurer, 11 members of the city council, and 5 judges.

SEC. 2. As the experience of the past hundred years in private and public business has demonstrated that the more authority is divided the less effective are the officers and the more unsatisfactory is the business performed, therefore, the members of the city council shall be elected by the people, who will hold them responsible for the honest, economical, and efficient conduct of the public business. All other officers named in this article shall be elected by the city council, and shall be removable at its pleasure, provided two-thirds of the members vote in favor of such removal.

SEC. 3. The terms of all officers named in this article shall begin on the day following their election and continue for 10 weeks, or until their successors shall have been chosen, but no person shall hold two offices at the same time.

ARTICLE II.—*Proportional representation.*

SEC. 1. Members of the city council shall be elected on one ticket for the entire city and not by wards or districts.

SEC. 2. Nominations shall be by petition submitted to the city clerk. A petition shall have at least ten signatures. Each petition shall present the names of as many candidates as the petitioners choose, less than the total number to be elected. The petition shall also add the name of an election judge.

¹Since the object of the school city is to teach the principles of adult government as well as to preserve order in the school, a bill of rights from the constitution of the State of Ohio is given in the appendix to this charter as a study in civics.

SEC. 3. The city clerk shall publish the lists of candidates.

SEC. 4. Each voter has as many votes as there are candidates to be elected. He can cumulate his votes as he pleases. He can give all his votes to one candidate or he can scatter his votes in any way he pleases.

SEC. 5. All the election judges of the different parties shall meet with the city clerk as an election board. They shall count the votes and publish the results of the election as follows:

(1) They shall prepare a list of candidates and find the total number of votes cast for each candidate.

(2) They shall add together the votes of all the candidates on the same party ticket, in order to find the number of votes cast for each party.

(3) They shall add together the votes of all parties in order to find the total number of votes cast.

(4) They shall divide the total number of votes cast by the number of candidates to be elected. The result shall be known as the "electoral quotient."

(5) They shall then divide the vote of each party, as ascertained above, by the electoral quotient. The result shall indicate the number of candidates elected by each party. In case this division does not come out even, the remaining candidate goes to the party having the highest remainder.

(6) The number of candidates to which a party is entitled, being determined as above, the successful candidates on a party ticket are the ones who have the largest number of votes on that ticket.

SEC. 6. Official ballots shall be supplied at all polling places, in this form if the school has printing facilities and it is convenient to do so. Otherwise, plain paper may be used.

Name of Party or Cause.

.....

Names of Candidates for Members of City Council.

.....
.....
.....
.....
.....
.....
.....
.....
.....
.....

OFFICIAL INSTRUCTIONS.

The voter must WRITE in the preceding blank space the names of his choice.
He is free to vote for any citizen of the school.
He may cumulate his votes as he may wish.
If he fails to write a name, his vote will count for his party or cause only.

ARTICLE III.—*Election.*

SEC. 1. A general election shall be held each tenth Tuesday, at which time the members of the city council shall be voted for. The first election each school year shall be on the second Tuesday after the beginning of the first term.

CHAPTER III.—LEGISLATIVE DEPARTMENT.

ARTICLE I.—*Power, members, etc.*

SEC. 1. There shall be a city council of eleven members, who shall make the laws of the city.

SEC. 2. The city council shall elect one of their own members to serve as president of the city council.

SEC. 3. A majority of all the members elected to the council shall constitute a quorum.

SEC. 4. The city council shall meet the first Thursday after the general election, at which time they shall elect all those officers provided for in Chapter II, section 1, and they shall elect a vice-chairman, whose duty it shall be to act as president of the city council when that officer is, for any reason, unable to perform the duties of his office. Special meetings of the city council may be called by the president of the council or at the written request of a majority of the members elected.

ARTICLE II.—*Mayor and ex-mayors in council.*

SEC. 1. The mayor and every ex-mayor of the city, as long as they remain citizens of the city, shall be entitled to a seat in the council and to participate in discussions, but they shall not be entitled to a vote. Should this provision become burdensome, the city council may put such restrictions upon the privilege as it may deem advisable.

ARTICLE III.—*Power of council, etc.*

SEC. 1. The city council shall have the power to enact such ordinances and resolutions for the good of the citizens as shall not conflict with the higher authorities.

SEC. 2. Every legislative act of the city council shall be by ordinance or resolution. No ordinance shall be passed except by a majority of all the members elected.

SEC. 3. Every ordinance or resolution shall, before it takes effect, be presented, duly certified, to the mayor for his approval. If he approves it, he shall sign it. If he disapproves it, he shall specify his objections thereto in writing and return it to the city council within three days. If he does not return it with such disapproval within the time specified, it shall take effect as if he had approved it. In case of disapproval, the objections of the mayor shall be entered at large on the journal of the city council; after two days and within ten days after its return, the council shall proceed to reconsider and vote upon the same. If it shall be passed by at least two-thirds of all the members elected, it shall take effect.

SEC. 4. The city council may at any time establish other departments not named in this instrument.

ARTICLE IV.—*The referendum.*

SEC. 1. Every bill adopted by the city council shall become a law and go into effect six school days after receiving the mayor's signature. As soon as it is signed by the mayor it shall be posted in a public place. If within four school days a petition signed by 10 per cent of the voters shall be presented to the city clerk, asking that such law be submitted to a vote of the citizens, the city clerk shall issue a notice of a special election to be held two school days later. The said petition shall name three citizens, who shall act as a committee to see that the ballots are correctly counted. At this election voters who favor the law shall vote "yes;" voters who oppose it shall vote "no." The city clerk, in the presence of a committee of three citizens, as provided for above, shall count the votes and shall announce the result. If a majority votes "yes" the law shall go into effect. If a majority votes "no" the law shall have no effect.

ARTICLE V.—*The initiative.*

SEC. 1. Any citizen may draft a proposed law or "bill" in the exact words in which he wishes it adopted. If 10 per cent of the citizens sign a petition asking that this bill be submitted to a vote of the citizens, the city clerk shall post a copy of the bill and shall give notice of an election to be held six school days later. The said petition shall name three citizens, who shall act as a committee to see that the ballots are correctly counted. At this election voters who favor the bill shall vote "yes;" voters who oppose it shall vote "no." The city clerk shall count the votes in the presence of a committee of three citizens, as provided for above, and declare the result, as in other elections. If a majority is found in opposition it shall be rejected and no similar bill shall be again presented for three months.

CHAPTER IV.—EXECUTIVE DEPARTMENT.

ARTICLE I.—*Mayor, etc.*

SEC. 1. The mayor shall be the chief executive officer of the city. He may be reelected, but not at three successive elections, each time being for a full term.

SEC. 2. Whenever for any reason the mayor shall be unable to perform the duties of his office, the president of the city council shall act as mayor.

ARTICLE II.—*Duties of mayor.*

SEC. 1. It shall be the duty of the mayor to communicate to the city council at its regular meeting a general statement of the government and improvement of the city.

SEC. 2. To recommend to the city council all such measures as he may deem expedient.

- SEC. 3. To keep himself informed of the doings of the several departments.
- SEC. 4. To be vigilant and active in causing the ordinances of the city to be executed and enforced, and for that purpose he may call together for consultation and cooperation any or all of the heads of departments.
- SEC. 5. To appoint commissioners and heads of departments except as is otherwise provided for in this charter.
- SEC. 6. And generally to perform all such duties as may be prescribed for him by this act and the city ordinances.

ARTICLE III.—*Duties of city clerk.*

SEC. 1. The city clerk shall take the minutes of the city council, deliver ordinances passed by the council to the mayor, return them to the council, certify to all ordinances passed, and keep the papers and records of the city not kept by heads of departments.

CHAPTER V.—ADMINISTRATIVE DEPARTMENTS.

ARTICLE I.—*Names and heads of departments.*¹

- SEC. 1. There shall be the following administrative departments: (1) Department of order or police; (2) military department.
- SEC. 2. The head of each of these departments shall be one commissioner appointed by the mayor, as hereinbefore provided. These commissioners shall hold office until their successors are chosen, unless removed by the mayor for cause.

ARTICLE II.—*Duties of heads of departments.*

- SEC. 1. It shall be the duty of the police commissioner to appoint one chief of police and as many more police officers and policemen as the city council shall direct.
- SEC. 2. The commissioner of military affairs shall organize and direct the management of a military body, consistent with the size and character of the school, for physical and mental discipline and exercise. He shall not act as an officer of the military body.
- SEC. 3. The city council may provide for the appointment by each commissioner of assistants and for their term of office, and for such additional duties for each commissioner as may seem consistent with the objects of his department.
- SEC. 4. All heads of departments shall, at the expiration of their term of office, render a written report to the city, which report shall be delivered by the heads of the departments to the city clerk.

CHAPTER VI.—JUDICIARY DEPARTMENT.

ARTICLE I.—*Courts.*

- SEC. 1. The judiciary department of the city shall consist of two courts, viz, the city court and the court of appeals.
- SEC. 2. The city court shall consist of five judges, elected as hereinbefore provided.
- SEC. 3. The court of appeals shall be the principal or superintendent of the school.

¹ The following-named departments are suggested for adoption by the city council as soon as practicable: Department of public works: The commissioner of public works shall have charge of all public works and any duties provided by the city council. Department of health: The health commissioner shall have general charge of the sanitary conditions of the city, and may devise and suggest plans to improve the same, including the dissemination of information pertaining to health. Department of finance: The finance department shall have control of such financial concerns as may be assigned to it by the city council. The head of this department shall be the treasurer of the city. Fire department: The fire commissioner shall be the chief of the fire department, and may organize the same as provided by the city council. Department of parks: The park commissioner shall have charge of the grounds and of the planting and care of vines, decorative plants, and trees. Department of games and recreations: The commissioner of games and recreations shall furnish, for the benefit of the citizens, rules and directions for the best games within his reach, avoiding all gambling games.

ARTICLE II.—*Duties of city judges.*

SEC. 1. The judges of the city court shall hold court singly.

SEC. 2. The day following their election the judges of the city court shall meet and determine the times and places of holding court, and which judge shall preside over each session. One session of court shall be held at least as often as once each week, and each judge shall hold court at least once.

ARTICLE III.—*Jurisdiction, power to summon, etc.*

SEC. 1. The courts shall have jurisdiction over all cases of violation of the laws and ordinances made in accordance with this instrument.

SEC. 2. The courts shall have power to summon any accused person before them.

SEC. 3. If any accused person so demand in the city court, the judge presiding shall grant him a trial by jury. The jury lists and methods of drawing the same shall be determined by the city council.

SEC. 4. No person shall be denied the right to have his interests defended by an attorney.

SEC. 5. Any person found guilty by the city court may appeal his case to the court of appeals.

SEC. 6. It shall be the duty of every judge to pass sentence upon the accused as soon as he is found guilty and to discharge any accused person found innocent.

CHAPTER VII.—DUTIES OF CHIEF OF POLICE AND ATTORNEY.

ARTICLE I.—*Chief of police.*

SEC. 1. It shall be the duty of the chief of police to notify all persons whose duty it is to appear before a court, in a manner prescribed by the city council, and to enforce the laws. He is the head of the police force, under the direction of the police commissioner.

ARTICLE II.—*Attorney.*

SEC. 1. The attorney shall defend the interest of the city in all cases of law and equity, and shall also act as public prosecutor.

CHAPTER VIII.—THE PRINCIPAL OF THE SCHOOL.

SEC. 1. The principal of the school has the right to attend all meetings of every nature and take such part as he may think desirable. Every action of every part of the government is subject to his approval.

CHAPTER IX.—AMENDMENT AND RATIFICATION.

SEC. 1. This instrument may be amended at any time by a three-fourths vote of all the members elected to the city council, provided the amendment be ratified by a majority vote of those voting when referred to the city for that purpose, and approved by the principal of the school and the general director of moral, civic, and industrial training.

SEC. 2. This charter shall take effect when ratified by a majority of the votes cast, when referred to the city for the purpose of ratification, and approved by the principal of the school and signed by the mayor.

_____, *Principal.*
_____, *Mayor.*

(Wood, 1901a, pp. 193-198)

Appendix 3

SCHOOL CITY ORDINANCES.

CHAPTER I.—THE GENERAL CITY LAW.

“As ye would that men should do to you, do ye even so to them.”
This is the general law of this School City, and all other laws and regulations must conform to it.

CHAPTER II.—THINGS PROHIBITED.

ORDER.

Art. 1. Anything which disturbs the order in halls, class rooms or toilet rooms is prohibited.

Art. 2. Anything which is immodest, profane, rude or intentionally unkind is prohibited.

CLEANLINESS.

Art. 3. Anything which unnecessarily detracts from the orderly appearance of our School City is prohibited.

HEALTH.

Art. 4. Anything which unnecessarily detracts from the healthful condition of our School City is prohibited.

PUBLIC AND PRIVATE PROPERTY.

Art. 5. Anything which unnecessarily mars or destroys property in our School City is prohibited.

CHAPTER III.—DUTIES.

Art. 1. Every citizen is obliged to call the attention of the authorities to any violation of the laws of this City.

CHAPTER IV.—PUNISHMENTS.

Art. 1. Any citizen violating any law of this City shall be subject to punishment not less than a reprimand and not greater than a withdrawal of the rights of citizenship.

Art. 2. Every punishment decreed by the court must be approved by the principal of the school before it is carried into execution.

CHAPTER V.—OFFICERS.

Art. 1. The Police Commissioner with the consent of the Mayor shall appoint one chief of police for the school and one captain of police and four policemen for each room.

Art. 2. The Commissioner of Military Affairs, with the consent of the Mayor, shall appoint one military chief for the school and one captain for each room.

CHAPTER VI.—TERMS OF OFFICE.

Art. 1. The term of office of all officers, unless otherwise provided, shall be until the next general election and until their successors are appointed or elected.

Art. 2. The Military Captains shall serve two weeks and until their successors are appointed, unless sooner removed for cause by the Commissioner of Military Affairs.

Art. 3. Captains of Police shall serve two weeks and policemen one week, unless sooner removed for cause by the Commissioner of Police.

.....City Clerk. President of the City Council.

Date..... Approved..... Mayor.
Approved..... Principal.

(Hanna, 1902, pp. 658-659)

About the Author

Mario Minichino is the middle child of a family of five children born to a working class Italian-American family in Ocean City, N.J. At the age of eleven his life was changed forever with the family's move from the U.S. to a small island in the Caribbean. Living on the island during the most formative years of his life he developed an affinity for the region and the people of the Caribbean, most particularly Cuba. Much of his life's work and a major focus of his education have been directed to the region's history, education, and politics. He earned his Bachelor's Degree in history from the State University of New York, Empire State College; his Master's Degree from the University of South Florida in Latin American and Caribbean Studies with an emphasis in Social Science education, and his Ph.D. from USF in Curriculum and Instruction, Social Science Education.

Currently living in Riverview, Florida, he is married to his best friend of 29 years; they have one child, a daughter who resides in Washington, D.C. Mario's interests in education research range from multicultural methods of teaching to the comprehension of history as it relates to current practices. A former high school social studies and English teacher, he also has taught Multicultural Education practices at the University level. Most recently he was employed as the Director of the Building Careers Academy in Washington, D.C.