



North Carolina: A Search for Identity

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Providence Spring Elementary School

This curriculum unit is recommended for:
4th Grade Social Studies

Keywords: North Carolina, history, nation, state, identity, tradition, mountain, coastal, Piedmont, simulation, active teaching, alternative learning, gifted education

Teaching Standards: See [Appendix I](#) for teaching standards addressed in this unit.

Synopsis: This unit is designed to introduce fourth grade teachers to a more contemporary approach to teaching the North Carolina Social Studies curriculum while simultaneously building content knowledge, specifically on the subject of North Carolina's development as a state with an independent identity. The goal of this unit is to help seasoned teachers move toward student-centered social studies instruction and help new teachers quickly build content knowledge while practicing best teaching methods.

I plan to teach this unit during the coming year to 27 students in 4th grade social studies, North Carolina: The Creation of the State and Nation.

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Unit Introduction

This unit is designed to introduce fourth grade teachers to a more contemporary approach to teaching the North Carolina Social Studies curriculum while simultaneously building content knowledge, specifically on the subject of North Carolina's development as a state with an independent identity. The goal of this unit is to help seasoned teachers move toward student-centered social studies instruction and help new teachers quickly build content knowledge while practicing best teaching methods.

The unit combines study of North Carolina's development with an imaginary-world simulation that tracks with the major events in the state's early history. The simulation allows students to understand history from the perspectives of different historical actors while grappling with technical challenges similar to those that confronted 17th and 18th century decision-makers.

The unit is also designed to help prepare students for college and career readiness through teaching specific strategies for analyzing primary documents, speaking and listening effectively, collaborating with peers, and writing. The primary method of instruction used in this unit is active historical simulation. This method of instruction is student-centered and closely aligned with objectives from the College and Career Readiness Anchor Standards for Speaking and Listening, College and Career Readiness Anchor Standards for Reading, College and Career Readiness Anchor Standards for Writing, and North Carolina Essential Standards for Fourth Grade Social Studies. (Note 1: see appendices for annotated objectives)

School Demographics

Providence Spring Elementary School is a public, suburban elementary school which is part of the district of Charlotte Mecklenburg Schools. Located on a beautiful, rolling, twenty-three acre campus in southeast Charlotte, the two-story building was built in 2002 to accommodate 800 students, and opened in August of that year with an initial enrollment of 630 students. Enrollment is now 903. Five mobile units have been added to the original building capacity. The school is located off Providence Church Lane, east of Providence Road and serves the flourishing local community of new and established neighborhoods. Providence Spring is a K-5 school, composed of 36 classes.

The school's instructional staff consists of 2 administrators, 38 classroom teachers, 7 full time teacher assistants, 11 full time teachers in the fields of special area, EC or support faculty, and a full-time guidance counselor. All of the faculty are certified, and considered highly qualified. The school is characterized by the intellectual strengths of the staff, and their wide-ranging passions and interests which they share with students. One fourth of the teaching staff hold advanced degrees. Twenty teachers are Nationally Board certified. Five of our teachers are SMART exemplary educators. The general office is run by three full-time secretaries. A staff of three custodians maintains the building. A school nurse serves the school five days a week. Breakfasts and lunches are prepared by a cafeteria staff of seven. There is an After-School Enrichment Program on site for the youngsters of Providence Spring.

The parents of Providence Spring Elementary School students are very involved in the school, with last year's PTA membership exceeding the number of students enrolled. The PTA Board is comprised of 55 members who are well organized in partnership committees that work diligently to coordinate the needs of the school program, in areas such as fundraising, cultural events, campus beautification, and volunteer tutoring. The majority of parents have an above-average income.

The demographic makeup of the student body is as follows:

African American	5%
Asian/Pacific Islander	18%
White	74%
LEP	2%
Gifted (Grades 3-5)	22%
SWD	6%

The school performs very well academically and has twice been named a National Blue Ribbon School by the U.S Department of Education (in 2008 and 2013.) In addition to being a National Paideia Center demonstration site, Providence Spring has also earned the designation of Character Education School of Promising Practices, and SMART elite showcase school. The Principal and five Providence Spring teachers are National Paideia Center National Faculty members. Our Media Specialist is a recipient of the CMS Gertrude Coward Award, and one of our teachers has received the Presidential Award for Excellence in the teaching of Math. One is a Gilder Lehrman Institute of American History and Preserve America winner for American History teaching. One is the Libby Gray award winner as Webmaster of the Year. An extensive range of extracurricular offerings is available to our students, and honors and trophies are awarded to our school each year at wider-area competitions such as Chess and Science Olympiad.

"What is it that binds us to this place as to no other? It is not the well, or the bell, or the stone walls, or the crisp October nights or the memory of dogwoods blooming. Our loyalty is not only to William Richardson Davie though we are proud of what he did 200 years ago today. Nor even to Dean Smith, though we are proud of what he did last March. No, our love for this place is based on the fact that it is as it was meant to be, the University of the People."

-Charles Kuralt

Rationale

North Carolina is a state full of rich traditions, unique cultures, and citizens passionate about their ties to the land, legends, and peoples. What are the origins of these traditions? What is it that cultivates such passion? What role does art and literature play in the shaping of North Carolina's identity? Ultimately, what defines a North Carolinian? In this unit, students and teachers will explore these questions together, weaving a tapestry of North Carolina's identity from its inception to the present day. By exploring these questions students will see how different ethnic groups have influenced the culture, customs and history of North Carolina and evaluate the importance of regional diversity on the development of economic, social, and political institutions.¹

Building Content Knowledge

Considering the somewhat ambiguous nature of North Carolina's identity, it is only fitting that the state's inception was based on a mystery. The story of Sir Walter Raleigh's Lost Colony of Roanoke is one of national intrigue with no conclusive ending. What ever happened to the colonists of Roanoke? This kind of historical enigma is precisely what set North Carolina apart from other states and what would eventually forge a legacy of tradition, progression, and pride.

¹ <http://www.dpi.state.nc.us/docs/acre/standards/support-tools/crosswalks/social-studies/4th.pdf>

To understand the importance of these legacies, it is imperative that teachers first build background knowledge of North Carolina in a historical context. The story of North Carolina, as its own entity, differs greatly from that of the Carolina colony from which it was conceived.

The colony of Carolina actually covered a huge expanse of land, from what is now North Carolina as far west as Western Tennessee and as far south as Northern Florida. Common law and balanced government were the main focuses of the Fundamental Constitution of Carolina - where English nobility would still maintain the majority of control in a hierarchical system. Composed by Ashley Cooper and John Locke, the vision of Carolina's future was constructed in a document known as the Grand Model for the Province of Carolina which entailed meticulously planned regions and cities, developmental plans, and growth models. This model had already been implemented successfully in Philadelphia, Charleston, and Savannah. Ironically, North Carolina's actual growth and development would be far more spontaneous and primarily depend on immigration and the state's unique landforms, rather than a large system of pre-planned cities as was intended. However, the Grand Model's concept of development did work well with plantation layout and land distribution, which were North Carolina's main sources of sustainability.²

Where its sister colony, South Carolina, had an easily accessible coastline, navigable inland rivers, and many potential ports, North Carolina's coastline was highly treacherous and would eventually gain the infamous nickname "Graveyard of the Atlantic" due to the high number of shipwrecks that would occur around the Outer Banks. As a result, North Carolina saw very little of the coastal success seen in South Carolina, primarily in the port city of Charleston. This contrast of wealth and development between the upper and lower part of Carolina created resentment between peoples in the regions, especially between the owners of small tobacco farms employing displaced indentured servants in what would become North Carolina and wealthy plantation owners in what would be Virginia and South Carolina. It was at this point that North Carolina's identity was somewhat conceptualized as the "underdog of the South". While this seemed like a negative disposition, the ambiguous nature of North Carolina's future would serve as an opportunity for the development of unique and rich cultures across the state.

The division of the Carolina colony became official in 1710, and in 1744 the modern borders of North Carolina were established. At this point, North Carolina's population consisted of about 30,000 colonists living mainly in small coastal towns, one-quarter of the state's population being enslaved peoples.³ Because the coastline was difficult to navigate, and therefore largely uninhabited, North Carolina had ample land available to be colonized, causing land-hungry colonists in Virginia and South Carolina to flock to North Carolina to take advantage of the opportunity. By 1765, there were over 350,000 people living in North Carolina. One minister in Brunswick described North Carolina as "a country inhabited by many sorts of people, of various nations and different opinions, customs and manners."⁴ A colonist named Alexander McAllister once noted in a letter that North Carolina was "in truth the Best poor man's Country I Ever heard of and I have had the opportunity of hearing from South & north."⁵

² Armitage, D. (n.d.). John Locke, Carolina, and The Two Treatises of Government. *Political Theory*, 602-627.

³ Hand, B. (2006). *Remembering Craven County: Tales of Tar Heel history*. Charleston, SC: History Press.

⁴ Clark, W. (2012). *The State records of North Carolina* (Vol. 6, Ser. 1). Nabu Press.

⁵ Norton, M. (2001). *A people and a nation: A history of the United States* (6th ed.). Boston, MA: Houghton Mifflin.

As the population continued to change drastically, so did the culture of North Carolina. In a letter to his family back home, German immigrant Christen Janzen wrote (in reference to North Carolina):

The land in general is almost everywhere black dirt and rich soil, and everyone can get as much as he will. There are five free years. After that one is to give for an acre, which is much greater than a [Juchart](#) with us, two pennies. Otherwise it is entirely free, one's own to use and to leave to his heirs as he wishes. But this place has been entirely uninhabited, for we have not seen any signs nor heard that anything else ever was here except the so-called wild and naked Indians.⁶

An especially compelling detail in the history of North Carolina is the delay in which a newspaper was established within the state. In fact, it wasn't until 1749, 60 years after the first newspaper in Boston was established, that North Carolina printed the first issue of "The North Carolina Gazette".⁷ Before this, the majority of North Carolinians relied on court hearings as a source of state and national news, though the newspaper was apparently just as unreliable as the gossip heard locally. The lack of communication in North Carolina played a large factor in shaping the state's identity. Not only did most colonists in the state reside miles away from one another, but the absence of press further limited public knowledge of important decisions made on the state's behalf. As a result, North Carolinians became fiercely independent and self-sufficient, especially in the Piedmont and Mountain regions. Several years later during the Revolutionary War, North Carolinians would establish this reputation nationally by being branded as "Tar Heels". This spirit of independence and self-sufficiency is a point of pride that helped define North Carolina and its citizens, leaving a lasting legacy.

Yet, farmers in the Piedmont, while self-sufficient, were not prepared for the heavy taxation that would be imposed upon them by the government. In his "Address to the People of Granville County" in 1765, George Sims said:

It is not a person's labor, nor yet his effects that will do, but if he has but one horse to plow with, one bed to lie on, or one cow to give a little milk for his children, they must all go to raise money which is not to be had. And lastly if his personal estate (sold at one tenth of its value) will not do, then his lands (which perhaps has cost him many years toil and labor) must go the same way to satisfy these cursed hungry caterpillars, that are eating and will eat out the bowels of our Commonwealth, if they be not pulled down from their nests in a very short time, and what need I say, Gentlemen, to urge the necessity there is for a reformation. If these things were absolutely according to law, it would be enough to make us turn rebels, and throw off all submission to such tyrannical laws..... But, as these practices are diametrically opposite to the law, it is our absolute duty, as well as our Interest, to put a stop to them, before they quite ruin our County.⁸

Tensions arose between the farmers in the Piedmont and plantation owners in the Coastal Plain ultimately resulting in the War of the Regulation and subsequently ending with the Battle of Alamance, and while the small militia of Piedmont farmers were no match for the king's army, the movement did display the independent spirit of the peoples of North Carolina. This

⁶ 2.4 A German immigrant writes home. (n.d.). Retrieved November 23, 2015, from <http://www.learnnc.org/lp/editions/nchist-colonial/1902>

⁷ Robert N. Elliott, Jr., "[James Davis and the beginning of the newspaper in North Carolina.](#)" *North Carolina Historical Review* 42, no. 1 (Winter 1965): 1-20.

⁸ George Sims, *an Address to the People of Granville County*, 1765.

was the first revolt in North Carolina over issues relating to taxation and local control, and it would foreshadowed the issues driving the impending American Revolution.

North Carolina's role in the American Revolution, Civil War, and Reconstruction era is both complicated and extensive. During this period, North Carolina experienced an identity crisis due to ongoing issues in the state's economic, social, educational, technological and political development. Because this unit is not meant to serve as an exhaustive history of the state, or the nation for that matter, let us shift the focus toward the identities that emerged as a result of these historical events.

In 1886, journalist Henry Grady published an editorial in the *Atlanta Daily Herald* that called into question the future of both North Carolina and the Southern United States writing:

The Old South rested everything on slavery and agriculture, unconscious that these could neither give nor maintain healthy growth. The New South presents a perfect democracy, the oligarchs leading in the popular movements social system compact and closely knitted, less splendid on the surface but stronger at the core—a hundred farms for every plantation, fifty homes for every palace, and a diversified industry that meets the complex needs of this complex age.

The New South is enamored of her new work. Her soul is stirred with the breath of a new life. The light of a grander day is falling fair on her face. She is thrilling with the consciousness of growing power and prosperity. As she stands upright, full-statured and equal among the people of the earth, breathing the keen air and looking out upon the expanding horizon, she understands that her emancipation came because in the inscrutable wisdom of God her honest purpose was crossed and her brave armies were beaten.⁹

While Grady did not express everyone's sentiments, he did somewhat prophecy the identity that many North Carolinians would go on to adopt. Peoples of the Mountain, Piedmont, and Coastal Plain region held on to many of their traditions, not wanting to let the past slip completely away, but also collectively looked ahead, imagining a rejuvenated, prosperous North Carolina. This was one of the most pivotal moments in North Carolina history. The former "Rip Van Winkle State" would reunify as the "Tar Heel State" - one of progress tradition, and courage. Unfortunately this unification would prove to be short lived.

North Carolina shifted its focus towards industrialization in the late 1800s and, in the process each region discovered its niche in the state's future. This is popularly known as the triple T's: tobacco, textiles, and timber. The coastal plain region primarily relied on its cotton and tobacco crops which would be shipped to the Piedmont for processing. The Piedmont heavily relied on tobacco crops, eventually becoming the largest supplier of tobacco products and coining the nickname "Tobacco Road". The main economical resource in the mountain region was timber, which led to a surge in logging and furniture making. Each region utilized its resources to successfully carve out a place in the economy. As the state invested in railroads and factories, North Carolina experienced an economic boom that created new jobs and expanded the population. Within fifty years, North Carolina went from having only four towns with populations of at least 2,500 in 1860 to having more than forty in 1910.¹⁰

⁹ Excerpt from speech by Henry Grady, December 22, 1886. Retrieved from <http://www.learnnc.org/lp/editions/nchist-newsouth/5489>

¹⁰ 2.4 The growth of cities. (n.d.). Retrieved November 23, 2015, from <http://www.learnnc.org/lp/editions/nchist-newsouth/4708>

North Carolina's early political and economic history was dominated by white settlers and their descendants, even though African Americans were a large part of the state's population, and contributed much to its culture. Prior to the Civil War Blacks were excluded from political participation and had few opportunities to influence the state's social development – although tension between slave-holding planters and small farmers was an important source of identity conflict in the state. Given its focus on early history, this unit looks primarily at regionally-based economic identities. After 1900, technology and transportation increased, so did the expectations of North Carolina's people. People could communicate, travel, and ship goods quickly. However, political and economic change caused much turmoil in the state, especially concerning race/gender relations and rural development. Extending this unit beyond the Civil War would require consideration of racial identity alongside the regional and economic identities outlined above.

In a broader context the following activities assume the premise of North Carolina's development, though each individual participant's experience may differ from North Carolina's story.

Eric Hobsbawm states,

First, official ideologies of states and movements are not guides to what it is in the minds of even the most loyal citizens or supporters. Second, and more specifically, we cannot assume that for most people nation identification – when it exists – excludes or is always or even superior to, the remainder of the set of identifications which constitute the social being. In fact, it is always combined with identifications of another kind, even when it is felt to be superior to them. Thirdly, national identification and what it is believed to imply, can change and shift in time, even in the course of quite short periods. In my judgment this is the area of national studies in which, thinking and research are most urgently needed today.¹¹

In other words, students will create meaningful learning about developing a nation and studying nationalism by making important decisions that will shape their nation's identity. As these important decisions are made in the interest of the nation, students will observe how ideologies may shift quickly, sometimes leaving only the land, borders, language, and titles to define the nation. Throughout the simulation students will encounter deeper questions of racial and ethnic identity in the context of the nation and later, reflect on how their decisions changed the nation's identity. This simulation provides a young audience with much-needed approach to a deeper understanding of nationalism and provides concrete answers to many abstract questions about our state's history and development.

Activities

The following activities will help students to make meaningful connections between the development of North Carolina and the process of forming a nation. Through the simulation, students will make decisions similar to those that North Carolina settlers and leaders would have had to make, both positive and negative.

The activities may be supplemented in several ways. The teacher may choose to present curricular information alongside the simulation or the teacher may choose to facilitate the simulation before presenting curricular information. The latter gives students a chance to make the connections between the simulation and curriculum on their own and is the recommended method of delivery.

¹¹ Hobsbawm, Eric J. (1990). *Nations and Nationalism since 1780*. Cambridge: Cambridge University Press.

The unit is separated into 19 different parts and can be easily modified to suit a wide array of instructional needs. While the unit will eventually include 19 sections, only the curriculum up to the end of the calendar year is included. This includes section one through six, or colonization through the Indian Removal Act. While this unit does not require a tremendous amount of front-end planning on the teacher's part, it is recommended that the teacher be well-read on North Carolina history and read the background information at the beginning of this unit.

Simulation Plan

1. Introduction • They Do Exist!
2. Map • The Cartographer's Report
3. Government Set-Up • Introduction to Government
4. Exploration, Settlement, and Colonization • Breaking Ground • O Capital, My Capital • The Balance Sheet • Score! • Settle In
5. Statehood • Develop the State • Progress • roads and education (connect people to increase happiness, economy) • taxes
6. Indian Removal • Not Alone/Trail of Tears
7. Economic Shift (from #5; in some places; agricultural to industrial)
8. Slavery • A Troubling Development
9. Civil War
10. Reconstruction
11. Industrialization
12. Advancement • Railroads • Telegraph/Telephone • Automobile • Planes
13. WWI
14. Suffrage
15. Advancements
16. The Great Depression • More, More, More
17. Child Labor
18. WWII
19. Segregation, Civil Rights

*****Please note that sections 9-19 are not included in this unit. They are currently in revision and should be available summer 2016. Please e-mail marks.surratt@cms.k12.nc.us if you are interested in obtaining these sections.**

They Do Exist!

The existence of extraterrestrial beings has been confirmed. There is life out there! Just hours ago an emergency transmission was received by our government from a group of aliens identifying themselves as Gwargles. These four-armed creatures are not unlike humans, though they are covered in a thick coat of white fur and overall are a larger size than a person, more closely resembling pictures of the legendary Yeti. See the picture for an idea, though remember the Gwargles have four arms instead of only two.

They are intelligent, can easily communicate with us, are peaceful, and, most importantly, need our help. In fact, that was the entire reason for their emergency communication. The Gwargles are in desperate need of assistance. Their home planet, called Avalanchia, is an ice planet galaxies away and has been nearly overtaken by another, fiercer species. This other alien species is a group of tyrants that is driving out the Gwargles. The Gwargles have come to Earth, hoping to find refuge and save their species.

Over the past several hours, governments from all around the world have been in constant communication with one another, and a decision has finally been agreed upon that the Gwargles will be welcomed to our planet and allowed to settle the region of our planet which is uninhabitable for humans yet perfect for this alien species – Antarctica.

You have been assigned to a special task force known as GOO. As a Gwargle Operational Overseer, you will assist the Gwargles in settling their new home and direct them in making decisions that are best for a thriving, happy, successful population. See the attached documents to help our new friends and neighbors colonize their land. Good luck!



The Cartographer's Report

The Gwargles have landed. They are unpacking their supplies and in a little while will be asking for your advice in settling the land. They are depending on you to make an informed decision about how best to set up their new life.

Before you meet with the Gwargles you need to know what type of terrain you're dealing with. It's time to be a master cartographer, or mapmaker. Follow the directions below to determine your terrain:

1. Cut out the borders of your land from the piece of paper you were given. If you have ever looked at the borders of continents, countries, states, or even counties, you know that borders can be in just about any shape. Just be sure not to cut too much or the Gwargles won't have enough room to spread out and grow.
2. Land is full of physical features. You're in Antarctica, but that doesn't mean it's any different. There are mountains, lakes (frozen of course), and rivers (a frozen river still moves, just very slowly, and we call it a glacier). On your map, draw...
 - One mountain range that is at least 12 inches long (it can be longer) by drawing a series of symbols that look like this: ^
Use a **black** marker, colored pencil, or crayon to draw them. You may draw more mountains or mountain ranges of any size if you want, but be sure to indicate them on the map by using the same symbol. Also, your mountain range does not have to be in a straight line. It can curve or zig-zag.
 - Two lakes that are at least 2 inches wide at the greatest span, which is the distance from one side to another (they can be farther apart). Use a **blue** marker, colored pencil, or crayon to draw and fill them in. You may draw more lakes of any size if you want. Your lakes do not have to be circles. In fact, most lakes have irregular shapes.
 - Five rivers that are at least 6 inches long each (they can be longer). Use a **blue** marker, colored pencil, or crayon to draw them. You may draw additional rivers of any size if you want. The rivers can be near to each other or spread out across your land. Also, they should flow into or out of a larger body of water such as an ocean or a lake, so draw them connecting to a lake or to the edge of your paper. Finally, they do not have to be straight. Most rivers have meanders, or curves.

Breaking Ground

It's time for your meeting with the Gwargles. After being flown down in the Air Force's latest state-of-the-art aircraft, you have just touched down in Antarctica. I hope you remembered your jacket and gloves!

Alongside the rest of your team of GOO, you meet the Gwargle leaders (thankfully in a heated tent) to show them the map you created. They are impressed by your work and inform you that they are ready to break ground and start building. The Gwargles tell you that they are prepared to construct 5 towns, but they need your help figuring out where to build them. They tell you some things about their species so you can make the best decisions possible:

- Gwarles aren't that different from humans. They need food, water, air, and shelter to survive. They are excellent musicians, enjoy a good snowball fight, and especially love to go on vacation. Though it might seem odd, they are particularly fond of the beach. It gives them a chance to shed before growing a new coat!
- For food, Gwargles have special cold-resistant seeds that grow crops right out of the ice, but just like human crops, they don't grow well in rocky areas. A few of their cash crops include icemelon, snowberries, and flarvum. Gwargles are also skilled fishermen, and they are excited to learn how humans ice fish to compare it to their own method.
- The icy land of Antarctica is too hard for the Gwargles to convert to water, so they will need to live near one of the frozen lakes or rivers for their water supply. On your map, you won't want them to have to travel farther than 2 inches to a water source.
- While Gwargles farm on the surface, they live underground. They like cold, but not wind and blizzard conditions! They are great tunnelers.
- Gwargle towns cannot be too close together. Each city needs to have enough room to build houses, farms, and other structures. On your map, you won't want to put them closer than 3 inches to each other.

Okay, the Gwargles are ready for your decision. On your map, use a **black** marker, colored pencil, or crayon to draw and fill in 5 circles the size of a penny to represent the 5 Gwargle cities. Place them wherever you want.

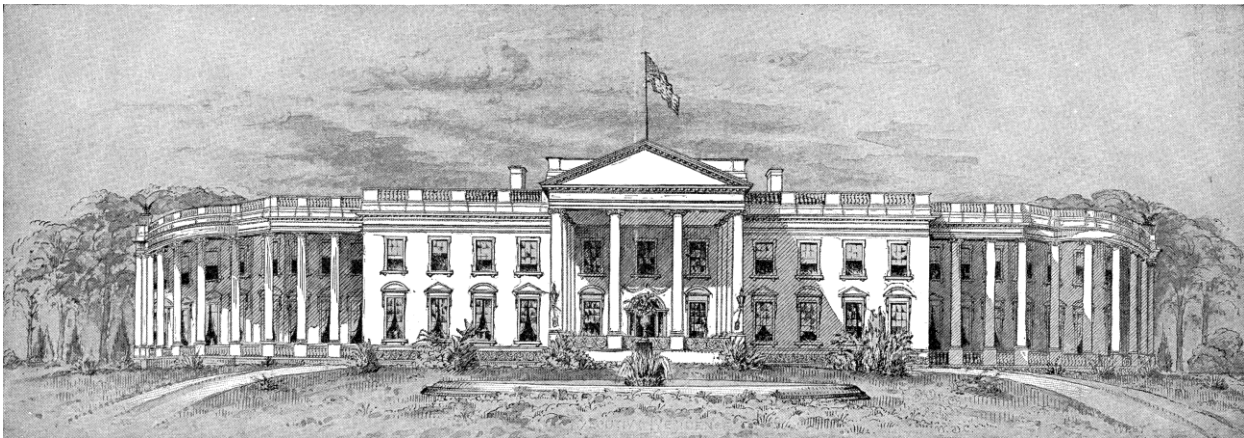
O' Capital, My Capital

The Gwargles took your advice and built their first five cities exactly where you suggested. Their underground homes are in place, their farms are already being tended, and the Gwargles are ready for the next step. Now, they need a home for their government. They need a capital.

Select an area that you think will make the Gwargles the happiest. Where is the best place for the capital? Should it be near a water source? It does NOT have to be within two inches of a water source like the cities on the map. You may place it wherever you want, but should it be on the coast? Should it be right in the middle of the map? Should it be as close to your cities as possible? Make a good decision. Remember, all the Gwargle citizens want to have easy and equal access to the capital.

Wherever you decide to place the capital, trace a circle the size of penny just like you did for the cities, but for the capital use a **yellow** marker, colored pencil, or crayon to draw and fill in a star within that circle.

Once you've got your capital in place, there's something else you need to do if you haven't yet.



You need to name locations. What is the name of your state? What are the names of your cities? Your capital? Name the rivers, the lakes, and give your mountain range a name as well as some notable peaks. Some of the most famous physical locations in the United States include the Rocky Mountains (a mountain range), Mt. McKinley (the highest peak in the US), Mt. Rainier (an active volcano!), and Lake Michigan. No doubt your state has some famous physical features. In North Carolina, for example, there is Mt. Mitchell, which is part of the Blue Ridge Mountains, and the Catawba River flows into Lake Norman near Charlotte. Be sure to give your locations names that the Gwargles will take pride in.

The Balance Sheet

A balanced society has many different parts. A healthy economy (business and finances) has a lot to do with social stability (how content people are with their life). A lot of times, the best way to develop a nation and its economy is to invest money. So, you have to spend money to make money. For a government, that means raising taxes or borrowing money.

Use the chart below to balance your society. This is your “score sheet.” You want to keep the Gwargle citizens happy. Historically, if a population isn’t satisfied, they look for something or someone to blame. A lot of times it is the government. The blame is on the people making the decisions, and for the Gwargles, that is YOU! Do the best you can, but you may find out that it’s not as easy as you might think...

Phase	☺ Growth, Development, Advancement, Happy Citizens	☹ Taxes, Poor Decisions, Discontent Citizens	Balance
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Phase 1 Scoring

Part 1

- Pass “The Balance Sheet” out to each group. I’d say read it aloud so you can throw out your own thoughts that go along with what it’s talking about (how a government has to balance between raising taxes so it can accomplish things versus keeping citizens happy), but if you’d rather groups read it on their own they can and it should still make sense.
- How Scoring Works - Students will tally points as they receive them (NOT waiting until the end of the phase), then when they’re done tallying write the number of tally marks in the number column. They calculate their score for that round in the “Phase Balance” column, and then they’ll recalculate the “Overall Balance.” Tomorrow the overall balance will be the same as our phase balance since it’s the first phase.

Part 2



- Pass the second sheet out and just do the top half, the “Score!” section. You’ll probably need to help students score accurately even though it should be pretty easy. Basically, if a city is within 2 inches of a river or lake, they get a tally in the happy citizens column (so they could get up to five, don’t include the capital). Also, if a city has the ability to travel easily to the capital (so they do NOT have to go around a mountain range or cross a river or lake or go way out of their way to get around them) then they get a point for each city. So, they could get up to 10 points.
- You can remind students that the Gwargles are just settling and don’t have advanced technology like planes, trains, cars, boats, ports, or even roads established. They’ve been trying to survive at this point, like our early settlers did when moving to the backcountry.
- Be sure students tally the unhappy citizen points as well (so if a city isn’t near water or is separated from easy access to the capital). Most groups will end up with just a few points.

Part 3

- Have students read the bottom half, the “Settle In” part. Students can read it on their own. Set a timer and say that when it’s done you’ll ask each group for their decision.
- Here’s how scoring works (and yes, this is still Phase 1):
 - If they choose 0 or 10, they lose 5 points and cannot add a city for going either before their citizens were ready to handle expansion or for waiting so long that every state around them has already gotten a significant head-start on them.
 - If they choose 1 or 9, they lose 1 point, basically for the same reason but not quite as bad of timing, and they can add 1 city to their map.
 - If they choose 4, 5, or 6 they get 10 points for making a great decision. They waited long enough to let their cities settle and develop, but not so long the citizens got restless and the area was getting overpopulated. Add 5 cities.
 - If they choose 3 or 8, they get 5 points for a good decision of not going too soon or too late. Add 3 cities.
 - If they choose 2 or 7, they get 1 point. They should have waited a little longer or gone a little sooner, but it wasn’t a bad decision. Add 2 cities.

Score!

The Gwargles have had a chance to settle in, and now they've had some time to think about the decisions you made. Let's see how happy they are. Use the Balance Sheet to "keep score." Place a tally mark under the correct column for Phase 1 according to the guidelines below...

 Growth, Development, Advancement, Happy Citizens	 Taxes, Poor Decisions, Discontent Citizens
<ul style="list-style-type: none">• 1 for each city that is within 2 inches of a river or lake (the ocean does not count).• 1 for each city that is not separated from the capital by a river, lake, or mountains (slight curves are allowed, but not more than a couple of inches).	<ul style="list-style-type: none">• 1 for each city that is not within 2 inches of a river or lake.• 1 for each city that is touching a mountain.• 1 for each city that is separated from the capital by a river, lake, or mountains.

Hopefully the Gwargles are happy with how you're doing. If so, great job! If not, you can still make some good decisions so they are. It's not too late. You're next important decision to think about starts NOW...

Settle In

It's time to help the Gwargles make the most important decision yet. The first 5 cities are settled and the farms are healthy and producing superb crops. The Gwargles love their new home in Antarctica, but their population is growing. There is a lot of unused land, and they need to know when it will be time to explore the land around them and attempt to build new cities.

It's already been five years, and in that time the Gwargles have made a vital discovery. They realized that if they tunnel down far enough, they have access to all the water they need. That means new cities don't have to be built based on proximity to lakes or rivers. Some Gwargles have even expressed interest in finding out what sort of wealth the mountains may hold, though most Gwargles say that would be foolish and dangerous.

You decide. At what point should the Gwargles attempt to expand and build additional cities? If it's too soon it could be disastrous, but at the same time you don't want to keep the Gwargles from progressing. What will you do? Choose a number from zero to ten for how many years you think the Gwargles should *wait* before attempting to build new cities.

From Settler to Citizen

The Gwargles finally feel at home. At first, they were settlers in a new place. They had to get to know the land, the strange-looking humans helping them out, and establish their first settlements. As a settler, you feel like a stranger in a new place not your own. Now the Gwargles have been around for years, their farms have taken root, and their population has grown. They're not strangers anymore. They're not just settlers. They understand that this is their land and their home. They are citizens, and they're ready for the freedoms of a citizen.

As settlers, the Gwargles' job was to survive, but that's not the challenge anymore. They have survived. They've made it and are thriving. As settlers you feel almost trapped and alone. You have your area that you have to hold onto against whatever is out there. Once you've done that, though, you begin to wonder what's out there. The Gwargles want to feel freedom. They want to go other places. They want to see what neighbors are doing and maybe even move. Some of them might even have things to sell or trade.

One freedom that you enjoy and aren't even necessarily aware of is the ability to go where you want. The Gwargles can't do that. They have no roads or any other sort of transportation system. They're isolated and don't have the ability to travel, visit, or explore. You have some decisions to make. You can build:

- roads to connect communities to one another
- tunnels to get through mountains
- bridges to cross rivers (no longer than $\frac{1}{4}$ inch, so hopefully your rivers aren't too big)
- ports on water sources to make water travel possible (you must have a port for Gwargles to be able to board and unboard)

Each of these projects is a way to bring Gwargles together instead of keeping them as isolated cities. However, constructing these things isn't going to be easy or free. Each project will require money, and the only way for you to get that money is to tax the Gwargles. Each project you build means one unhappy, discontent tally. You decide how much to spend. You are allowed to go negative, if you think that's what is best. So, if you have 5 points, this does NOT mean you can only do 5 things. It's your choice to do as much or as little as you think is best. Check out the table to see further details about construction:

Roads	6 inches of road = 1 tally	- use something black to draw a line (no thicker than a regularly drawn line) - roads may curve - each road is new construction - roads shorter than 6 inches still cost 1 tally
Tunnels	1 inch of tunnel = 1 tally	- use something black to color a 1x1 inch square
Bridges	$\frac{1}{4}$ inch bridge = 1 tally	- use something brown to color a bridge over a river no longer or wider than $\frac{1}{4}$ of an inch
Ports	1 port = 1 tally	- use something brown to draw an equal sign (=) with lines each $\frac{1}{2}$ inch long on the edge of a water source

*For each project that is incorrectly built, there will be a 1 tally penalty.

Phase 2 Scoring

Scoring this phase can be tricky, so you'll want to help the students and double-check their work. First, make sure students are accurately tallying the cost of their projects and representing them correctly on their map. They shouldn't be building 10-lane highways thicker than their rivers! Here's what things cost and how they should be represented:

Roads	6 inches of road = 1 tally	- use something black to draw a line (no thicker than a regularly drawn line) - roads may curve - each road is new construction - roads shorter than 6 inches still cost 1 tally
Tunnels	1 inch of tunnel = 1 tally	- use something black to color a 1x1 inch square
Bridges	¼ inch bridge = 1 tally	- use something brown to color a bridge over a river no longer or wider than ¼ of an inch
Ports	1 port = 1 tally	- use something brown to draw an equal sign (=) with lines each ½ inch long on the edge of a water source

Set a timer. Give groups maybe 30 minutes to discuss, plan, and add their construction projects to their maps. It is up to each group how much they want to invest. They are allowed to spend more than they have. If they have 5 points, that doesn't mean they can only do 5 things. Then give them a few more minutes to make sure their math is right as far as the cost of the projects and recorded in Phase 2 of their balance sheet.

After that, let students know the results of their decisions. Here is how scoring goes:

- Each city earns a happy tally for each city it is connect to via a transportation route.
- If a city is not able to reach another city, that is a discontent tally.
- If a project was incorrectly put on the map, that is a discontent tally (at your discretion).

That's it, but here's an example: A-----B-----C D-----E F

- City A can get to City B as well as City C. That's 2 points.
- City B can get to City A and to City C. That's 2 points.
- City C can get to City B and to City A. That's 2 points.
- City D is connected to City E. That's 1 point.
- City E is connected to City D. That's 1 point.
- City F is not able to get to any other city. That's a negative/discontent point.
- Total, that's 2 + 2 + 2 + 1 + 1 - 1 = 7

Go around to each group. They will need help. Basically, if you start at each city and calculate the points each city gets, it's not too difficult. Remember, just so cities are connected it counts. It can be via a road, a bridge across a river, or using ports on lakes and/or rivers. Students have the ability to get A LOT of points this phase, especially compared to last phase.

Progress

Things are moving fast, and your Gwargles are happy! They're traveling all over the state and are ready for more. In fact, you need to add some cities:

- If you have 10 or fewer points, add 5 cities to your map.
- If you have from 11 to 30 points, add 6 cities to your map.
- If you have from 31 to 50 points, add 7 cities to your map.
- If you have more than 50 points, add 8 cities to your map.

Now that the population is connected more than ever, Gwargle society is developing faster than ever, which means you might need to think ahead. Here are some things to think about...

Your citizens can travel, but there is so much more you can do for them if you choose. You can build schools to educate them, build police and fire stations to protect the Gwargles and their property, and build medical facilities to keep the citizens healthy.

So, in Phase 3 you can still do any of the previous projects for the same price, especially since you have new cities, but now the list of what you can do has grown:

Roads	6 inches of road = 1 tally	- use something black to draw a line (no thicker than a regularly drawn line) - roads may curve - each road is new construction - roads shorter than 6 inches still cost 1 tally
Tunnels	1 inch of tunnel = 1 tally	- use something black to color a 1x1 inch square
Bridges	¼ inch bridge = 1 tally	- use something brown to color a bridge over a river no longer or wider than ¼ of an inch
Ports	1 port = 1 tally	- use something brown to draw an equal sign (=) with lines each ½ inch long on the edge of a water source
Schools	1 school = 1 tally	- draw a skinny yellow ring around the city
Police	1 station = 1 tally	- draw a skinny blue ring around the city
Fire	1 station = 1 tally	- draw a skinny red ring around the city
Medical	1 facility = 1 tally	- draw a skinny green ring around the city

*For each project that is incorrectly built, there will be a 1 tally penalty.

Phase 3 Scoring

Scoring this phase should be fairly simple:

- For each city that is connected to another city via transportation, has a school, a police station, a fire station, and a medical facility, it is very happy. If it has all 5 of those things, the group gets 5 happy tallies per city.
- If a city is connected to another city via transportation, has a school, a police station, a fire station, or a medical facility, it is fairly happy. So, if it has one or some of those things but not all of those things, it is 1 happy tally per city. They're happy for what they have, but they could be happier, especially seeing that other cities have things they don't. If the city next to us had a fire station and we didn't, we wouldn't be all that happy.
- If a city is by itself without any development, it is VERY unhappy. Groups get 10 discontent tallies for each city that has no development and is not connected to any other cities.

Not Alone

Not long ago, a small group of Gwargles went into the treacherous mountains to explore, and they returned with a couple of exciting finds.

First, as it turns out, the Gwargles aren't the only intelligent life in Antarctica. The expedition was shocked to discover that a species not unlike themselves inhabited the mountains. From what the exploring Gwargles could find out, the natives identified themselves as Chumbles. The Chumbles look very similar to the Gwargles, but they are significantly less developed. They live in caves, speak a primitive language, and have virtually no technology. They scavenge the mountains for food and were blown away by all the trinkets the Gwargle explorers showed them. Crazy! I guess all those stories about UFO's and aliens were true after all.

The second major find is something that has the nearby Gwargle population in a tizzy. The Chumbles have found a rich deposit of gold in the mountains. The Gwargle explorers came back telling stories of how the Chumble people have caves brimming over with gold. They also related how the Chumbles don't seem to have any idea how valuable it is. They merely use all that gold as decoration because it's shiny.

The Gwargles want that gold, and flocks of them are already packing up to move to the mountains to strike it rich. However, it's not their land. The Chumbles have settled the mountains. It's their home, and they have been there for years. You've got a decision to make. You must choose between two difficult options. You either have to let the eager Gwargle citizens know that they cannot infringe on the Chumbles territory, or you can move the Chumble population. The Gwargles have already picked out an empty territory near the coast where the Chumbles can live. They will even assist them on their journey to their new home, but that means uprooting them from their home and forcing them to leave the life they know.

The Chumbles do not want to move. The Gwargles want the gold. What will you and your GOO team decide?

Trail of Tears

You've made your decision with the Chumbles, and here are the results of that decision...

If you chose to let the Chumbles stay in the mountains and informed the Gwargles they could not go to the mountains and get the gold that is the right decision. The Chumbles were there first. It's their land, and they have the right to it. However, the Gwargles are NOT happy. They want that gold, and they don't understand why you told them no if the Chumbles don't even realize the fortune they have. Plus, they're so primitive it would be easy enough just to take it from them. So, that's exactly what the Gwargles do. They ignore your decision and head for the mountains anyway. It's an official gold rush. You need to add 3 cities in the mountains, each within an inch of each other. You also need to build a Chumble territory near the coast. It should be a 2 inch by 2 inch square section of land that is at least 6 inches away from any Gwargles. The Gwargles have no interest in being anywhere near the Chumbles. They send an escort of soldiers that forces all the Chumbles to leave their homes. On the journey to the new, undeveloped territory you've set aside for them, half the Chumbles die of sickness and starvation. Their lives are devastated. On top of that, even though you made a good decision, the Gwargles are not happy with you, so you need to put 5 unhappy/discontent tallies for Phase 4. It's a sad result all around, but the Gwargles get what they wanted in the end - they're flooding the mountains to get any gold they can find.

OR

If you chose to remove the Chumbles from the mountains and informed the Gwargles they could go to the mountains and get the gold that is a horrible decision. The Chumbles were there first. It's their land, and they have the right to it. How could you make the decision to kick them off their own land just because you are more advanced? However, the Gwargles are happy. They want that gold, and they're happy you agreed, especially since the Chumbles don't even realize the fortune they have. Plus, they're so primitive it will be easy enough just to take it from them. So, that's exactly what the Gwargles do. They head for the mountains. It's an official gold rush. You need to add 3 cities in the mountains, each within an inch of each other. You also need to build a Chumble territory near the coast. It should be a 2 inch by 2 inch square section of land that is at least 6 inches away from any Gwargles. The Gwargles have no interest in being anywhere near the Chumbles. They send an escort of soldiers that forces all the Chumbles to leave their homes. On the journey to the new, undeveloped territory you've set aside for them, half the Chumbles die of sickness and starvation. Their lives are devastated, but the Gwargles are happy with you, so you get to put 5 happy tallies for Phase 4. It's a sad result for the Chumbles, but the Gwargles get what they wanted in the end - they're flooding the mountains to get any gold they can find.

NOW

We need to figure out how much gold you get. Either decision you made, now we need to see just how rich your Gwargles are going to strike it!

Scoring Phase 4.2 - The Gold Rush

You need one dice for this. There will be 3 rounds for each group to see how much gold they get out of the mountains. Do this together as a class as opposed to each group getting a dice.

Round 1

- Each group chooses one number (1-6). It's okay if multiple groups choose the same number.
- After each group has chosen, roll the dice. As soon as the number you roll on the dice matches the number a group picked, they are out for the rest of the round. Each time you roll a number and any group still in does NOT have that number, they get to add a happy tally (they found gold).
- Keep rolling until every group is out.

Example:

Group A chooses 2

Group B chooses 6

Group C chooses 3

Dice Rolls - 1, 4, 2, 5, 5, 5, 6, 3

Group A gets 2 happy tallies because they get out on the third roll.

Group B gets 6 happy tallies because they get out on the seventh roll.

Group C gets 7 happy tallies because they get out on the 8th roll.

The round is over on the 8th roll because all groups are out.

Round 2

- Each group chooses two different numbers (1-6).
- If either number a group chooses is rolled, they are out for the round.
- Groups get 2 tallies each time neither of their numbers is rolled.

Round 3

- Each group chooses three different numbers (1-6).
- If any number a group chooses is rolled, they are out for the round.
- Groups get 5 tallies each time none of their numbers is rolled.

Economic Options

The Gwargles are continuing to advance. Businesses are growing and changing. All the roads and transportation routes have helped your Gwargles to progress. This leaves you with some choices to make.

First, new technology makes projects quicker and cheaper to build. You can build more than ever for less than ever. So...

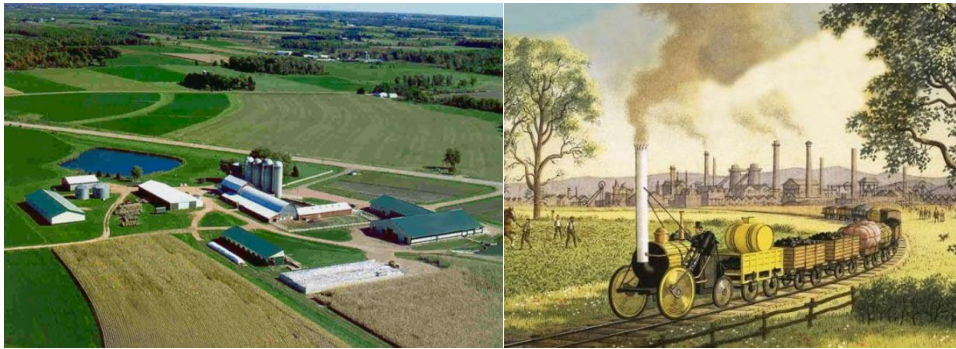
Roads	Build any length of road for a cost of 1 tally.	<ul style="list-style-type: none"> - use something black to draw a line (no thicker than a regularly drawn line) - roads may curve - each road is new construction
Tunnels	These projects are all two-for-the-price-of-one. So, build any two of these for a cost of 1 tally.	- use something black to color a 1x1 inch square
Bridges		<ul style="list-style-type: none"> - use something brown to color a bridge over a river no longer or wider than $\frac{1}{4}$ of an inch
Ports		<ul style="list-style-type: none"> - use something brown to draw an equal sign (=) with lines each $\frac{1}{2}$ inch long on the edge of a water source
Schools	Now you can build all of these projects together for a cost of only 1 tally.	- draw a skinny yellow ring around the city
Police		- draw a skinny blue ring around the city
Fire		- draw a skinny red ring around the city
Medical		- draw a skinny green ring around the city

There are also some additional projects you can choose to build...

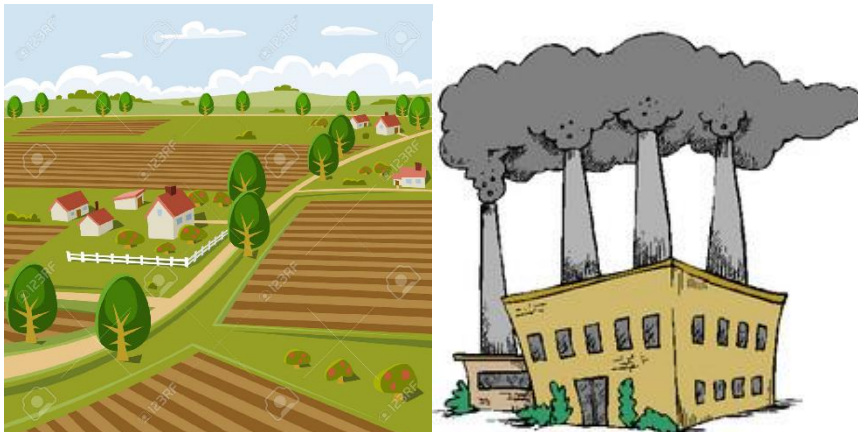
Cities	Add a city for 5 tallies.	<ul style="list-style-type: none"> - add an undeveloped city just like you have before, by adding a black circle the size of a penny - you must pay additional costs to develop your city (costs are above)
Navy Base	Add a base for 5 tallies.	- add a navy base by adding a blue circle the size of a penny (it should be near water!)
Army Base	Add a base for 5 tallies.	- add an army base by adding a green circle the size of a penny

Economic Options

There's one last item for you to consider, and it might just be the most important one of all. You need to decide what the focus of your economy is going to be. Up until this point, your Gwargles have depended on and thrived with agriculture. They've been farmers, they know how to farm, and they've been successful with it. We know that works. However, with new advancements and technologies, you might decide that taking a risk and attempting to industrialize your state is a better option. This means converting your farms into industrialized areas. In other words, areas that have factories and are focused on the buying and selling of products and services versus growing and selling crops. You don't know if it will work, but it's your decision.



OR



This round, because you know that an agricultural economy definitely works, if you choose to remain focused on agriculture, you get to double this round's score. If you choose to industrialize your economy, you don't know if it will work, so by choosing to encourage the Gwargles to replace their farms with buildings for business you are taking a big risk. You will not get to double this round's score.

You may also choose to keep half of your cities agriculturally based and convert the other half of your cities to industrialized areas. If you choose this option, you also do not get to double this round's score.

If you are keeping your state focused on agriculture, draw an 'A' next to your capital. If you are switching your focus to industry, draw an 'I' next to your capital. If you're doing half-and-half, draw an 'A' and an 'I' next to the capital.

Phase 5 Scoring

This one can be pretty complicated.

First, as students are working on their maps see whether they are choosing to stay an agricultural economy, switch to an industrialized economy, or a mix of the two. After students have added things to their maps that they want, be sure to talk about what it actually means to have an agriculturally-centered state (centered on farming) or an industrialized state (centered around industry - factories, etc.). Explain that choosing one or the other doesn't mean the other doesn't exist. In other words, if you're switching to an industrialized state, it doesn't mean there isn't a single farm and your Gwargles are going to starve and die. It simply means that the state's economy is driven by agriculture and that's where resources are *mostly* invested.

Now, this is slightly deceitful, but the goal is to have a mix of A and I, so if all of your class is sticking with A or all changing to I, it can really mess up the next phases. That means you might want to make some well-placed comments and questions to groups to see how you can change their minds before the actually scoring part so that you have at least some of a mix.

When it comes to scoring, you also want to sort of make a wedge between the two sides (to begin setting up a Civil War). Here's what I would do:

- If you have a good mix of A and I - The A's get to double their phase score, but the I's and the AI's don't get anything extra. You can emphasize how the A's are established in their business of farming and are thriving while the I's risk hasn't paid off yet.
- If you have lots of A's and not many I's - The A's get to double their phase score, but the I's risk has paid off, so AI's get to triple their phase score and I's get to quadruple their phase score. You can talk about how industry is the wave of the future and about how all the major cities we see around now are industrialized cities (New York, Los Angeles, Charlotte, etc.).
- If you have lots of I's and not many A's - The A's get to double their phase score, but the I's and the AI's don't get anything extra. You can again emphasize how the A's are established in their business of farming and are thriving while the I's risk hasn't paid off yet.

Okay, so here's the actual scoring part. I would recommend that students do their work with the tallies on the back or on a separate sheet of paper and that you check each group's score for something that's at least close to accurate. For reference going forward, a "fully developed city" means that the city has a school, fire station, police station, medical facility AND is connected to at least one other city. It needs all of those things. Also, the military bases and Chumble territory do not count as cities, so it's okay if they're not developed like other cities or even connected.

- Any city that has nothing (not developed and not connected to any other city) is -10. It's easy for groups to forget about their mountain cities and lose a quick 30 points from it.
- Any city that is not fully developed is -5 (for each city not fully developed). These are cities that might have some things, but not all.

- Connecting the Gwargles and the Chumbles is -10. They don't want to be near each other.
- Each military base is +10.

From here, any scoring is only for the fully developed cities. The rest of the scoring this phase is based one thing - if ALL cities are connected. In other words, if a city can get to every other city somehow, whether it's through roads or tunnels or bridges or ports or however, as long as it can get to EVERY city, you are "completely connected."

- If all your cities are completely connected, you get +10 for each fully developed city.
- If your cities are only partially connected (even if it's just one city that was forgotten), you only get +5 for each fully developed city.

Bonus - This round there is an additional way to get some points. Each city that is directly connected is +1. So...

City A ----- City B ----- City C

City A is directly connected to City B, so that would be +1.
 City C is directly connected to City B, so that would be +1.
 City B is directly connected to City A and City C, so it would be +2.
 In total, that would be +4.

Tallying all the directly connected roads can be tricky, so if you think a group at least got close to an accurate number, I wouldn't worry about checking this part for exact accuracy (it's just not important enough to take your time counting exactly).

Just so you know, groups should score A LOT of points this phase. Remember, some groups will get to double their phase score and maybe even triple or quadruple it. Make sure students get their total phase score before multiplying. Some groups might multiply their positive score before subtracting out all the negatives of when they spent money to build their projects or lost points from undeveloped cities. That is NOT what they should do. Positives minus negatives and then multiply for the total phase score. Then they get their overall score by adding/subtracting from their previous total.

NCES Objectives

4. H.1.3 Explain how people, events and developments brought about changes to communities in various regions of NC.

4. H.2 Understand how notable structures, symbols, and place names are significant to North Carolina.

4. G.1 Understand how human, environmental, and technological factors affect the growth and development of North Carolina.

4. G.1.3 Exemplify the interactions of various peoples, places and cultures in terms of adaptation and modification of the environment.

4. C.1.1 Explain how the settlement of people from various cultures affected the development of regions in North Carolina (languages, foods, and traditions).

4. C.1.2 Explain how the artistic expression of various groups represents the cultural heritage of North Carolina.

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