

# ARCHIVE

An Undergraduate Journal of History



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# ARCHIVE

AN UNDERGRADUATE JOURNAL OF HISTORY

Volume 24, May 2021

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Cover Image

This photo depicts a person with a bicycle outside what is now the  
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## A Note from the Editor

The 2021 *ARCHIVE* Editorial Board is proud to present Volume 24 of *ARCHIVE*. Produced by history students at the University of Wisconsin–Madison, *ARCHIVE* has showcased remarkable undergraduate historical scholarship for the past twenty-four years. This edition is no exception, once more affording readers a chance to explore a diverse assortment of historical themes, actors, and backdrops. This year the editorial board is also pleased to unveil a new project, one which lies outside of the traditional scope of *ARCHIVE*. Our hope is that both components will excite and engage our readership.

Volume 24 begins with Alyson Long’s discussion of Lithuanian-American identity and its evolution from the late nineteenth century through the end of World War II. By examining Lithuanian-American political publications, Alyson explores how members of an oft-forgotten diasporic community altered their methods of self-presentation to garner American support for Lithuanian independence. We then turn to thirteenth-century France in Madeleine Gaynor’s article on the regency of Countess Blanche of Navarre. In her piece, Madeleine analyzes the relationship between the countess’s religious patronage and her political victory in the War of Succession of Champagne, all the while engaging with a broader conversation of how aristocratic women navigated the religious milieu of medieval Europe. From there, we transition back to the twentieth century and questions of identity with Hayden Kolowrat’s study of the Philippine Scouts, a traditionally overlooked military body in the historiography of colonial armies. Hayden investigates the processes of identity formation that encouraged these regiments of Filipino soldiers to not only remain loyal to the US Army before World War II, but also immigrate to the United States after the Philippines became independent.

The remaining half of the journal travels home to UW–Madison, focusing on an all-too-familiar piece of contemporary history. In light of the circumstances that surrounded the production of this volume, we elected to devote a portion of the journal to a curated collection of primary source material related to the COVID-19 pandemic. The collection is titled “Personalizing the Pandemic: A Documentary History of UW–Madison Student Experiences in the Year of COVID-19.” The purpose of this project

## A Note From the Editor

is to preserve campus documents, student newspaper articles, and oral histories about the pandemic for future readers and historians alike. A true testament to the journal's name, this collection seeks to function as a small archive of its own. We hope it serves the memory of the pandemic well.

This volume of *ARCHIVE* would not have been possible without the support of countless individuals at UW–Madison. First, our editorial board would like to extend our sincere gratitude to Professor Sarah Thal, our faculty advisor, for graciously giving her time and sharing her expertise with us this semester. We owe the success of the journal to her. Our board would also like to recognize Digital and Media Archivist Catherine Phan and Oral History Program Head Troy Reeves of the UW Archives whose assistance proved invaluable as we worked to compile our documentary history. Additionally, we are grateful for the encouragement and guidance that Scott Burkhardt, Christina Matta, and the entire History Department faculty and staff provided throughout the publishing process. Finally, we must express our genuine appreciation to the History Department's Board of Visitors for generously funding the printing of this year's journal.

Indeed, our editorial board met in person only twice over the course of the semester. This volume is therefore the product of innumerable video calls, online discussions, and phone conversations. Although these circumstances certainly posed some challenges, they also brought our board closer together. Ultimately, I am indebted to the hard work, dedication, and undeniable excellence that our editors brought to *ARCHIVE*. It has been a privilege to learn from each one of them. I want to especially thank our three graduating seniors for devoting a significant portion of their final semester to the journal. I now invite our readers to turn the page and delve into Volume 24 of *ARCHIVE*.

- Madeline Brauer, *ARCHIVE* Editor-in-Chief

# Diaspora Politics

How the Lithuanian-American Community Sought American Support for an Independent Lithuania, 1890–1950

*Alyson Long*



Image: Alyson Long, *Gediminas's Tower* (Vilnius, Lithuania, 2019).

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Alyson Long graduated from the University of Wisconsin–Madison in 2020 with a BA in History. Her studies focused on Lithuanian and Eastern European history. Her capstone paper, “The Blazis-Kubilus Family: From a Lithuanian Village to an Illinois City,” tells the story of her Lithuanian family and their immigration to the United States. The paper was a featured article on *ARCHIVE*’s website in 2019. The article published in this edition of *ARCHIVE* is an abridged version of her senior honors thesis written under the supervision of Professor Kathryn Ciancia. For her thesis, Alyson received an Area and International Studies Undergraduate Paper Award through UW–Madison’s Center for Russia, East Europe, and Central Asia (CREECA) as well as the Iwanter Prize Honorable Mention Award in 2020. She will attend the University of Illinois College of Law this fall.

On Christmas Eve in 1940, Colonel Jonas Petraitis walked to the railroad station with a friend to grab a beer in the small town of Alytus, Lithuania. Though he was “filled with a curious sense of foreboding and did not wish to go,” he ultimately agreed to leave his small farm to be taken into town.<sup>1</sup> As the two neared the station, an unknown man slowly “emerged from the bushes and stood in [their] path.”<sup>2</sup> In the distance, another unknown man stood by a car. He spoke to Colonel Petraitis in a low voice: “You are under arrest. Get into the car.”<sup>3</sup> With two other detainees in tow, the vehicle started in the direction of Kaunas. They drove past Colonel Petraitis’s home, but his captors did not grant his request to say goodbye to his family. According to Colonel Petraitis, this moment would mark “the prelude to long months of imprisonment, suffering, and exile” under the authority of the NKVD, the Soviet Union’s secret police force.<sup>4</sup>

Ten years later, the American branch of the Lithuanian organization known as the VLIK (*Vyriausiasis Lietuvos išlaisvinimo komitetas*, or the League for the Liberation of Lithuania) published Petraitis’s autobiography in Cleveland. During World War II, the VLIK operated in the United States as the Lithuanian government in exile. The language that the VLIK utilized in this publication suggests that they did not seek to merely inform the American public of the horrors unfolding in Soviet-controlled Lithuania; rather, it suggests that the VLIK sought to inspire Americans to take a firm stance against the Soviet Union. Championing Colonel Petraitis as a Lithuanian hero in a biographical addition to the autobiography, the VLIK emphasized his “flaxen blond hair” and “beautiful grey-blue eyes” as well as his military achievements and dedication to Lithuanian values.<sup>5</sup> While this description was crafted to gain American sympathy, the end of the piece presented the VLIK’s objective in clear terms: “Today Lithuania and the neighboring states of Latvia and Estonia are under Bolshevik occupation for the second time...If true freedom and stable peace for the world is to be desired, Communist tyranny must be destroyed.”<sup>6</sup>

This paper traces the evolution of the Lithuanian-American community’s efforts to present a particular version of Lithuanian identity to the American public between the years surrounding Lithuania’s independence in 1918 and its annexation into the Soviet Union in 1940.<sup>7</sup> Lithuania, a small nation on the Baltic Sea, experienced two waves of mass emigration during the late nineteenth and early twentieth centuries. These migrants came

to the United States at a time when two Western concepts, nationalism and national identity, were constantly evolving. Each of these migration groups were unified in their connection to a growing Lithuanian diaspora; they were both displaced from their homeland and retained a strong connection to it. However, the events of each world war transformed Lithuanians' understanding of themselves and their homeland, as Lithuania progressed from a mere concept to a legitimate nation-state. This evolution of Lithuanian identity caused a division in the values of each migration wave, affecting how these migrants presented the idea of Lithuania to the American public in their published political material.

I will argue that Lithuanian-American political publications between 1890 and 1950 reveal a shift in how Lithuanian Americans portrayed Lithuanian identity to the American public. It was a combination of both the evolution of Lithuanian identity and the changing social and political tides of the United States that contributed to this shift. I have chosen to explore Lithuanian-American work specifically between the post-World War I period and the World War II period for two reasons. One is to highlight the difference in the Lithuanian-American political approach at two key moments: Lithuania's first claim for independence from the Russian Empire in 1919 and its efforts to reclaim independence following its annexation into the Soviet Union in 1940. The second is to compare how Lithuanian-American political organizations operated under the influence of each Lithuanian migration wave to the United States. This paper will outline how Lithuanian-American identity evolved during this time and how this evolution influenced the Lithuanian-American political approach of each period.

Influenced by the ever-evolving nationalist values of both Lithuania and the United States, Lithuanian Americans felt they needed to adapt in their efforts to present a particular definition of Lithuanian identity to achieve their political goals. Their political publications provide a framework from which we can understand how national identity rapidly evolved during this period; it could be bent and shaped at will to serve a political purpose and achieve an international goal. This study suggests that close analysis of the political work of a migrant community, such as the Lithuanian community in the United States, can reveal a deeper conversation about the malleable nature of late-nineteenth- and early-twentieth-century nationalism.

## **The Origins of Lithuanian-American Identity and the First-Wave Pioneers**

Apart from some scattered historical evidence suggesting that Lithuanians have been arriving in the Americas in small numbers since the mid-seventeenth century, not much is known about Lithuanian migration to the United States prior to what historians of Lithuanian emigration label as the “first wave.”<sup>8</sup> It was not until the late nineteenth century that organized communities of ethnic Lithuanians began to emerge. These communities saw their largest growth in two major waves of migrants: the aforementioned first wave beginning in the late nineteenth century and the other beginning in 1939. Historians of Lithuanian emigration to the United States often refer to these waves as the “economic” and the “political” waves, in reference to the primary motivations that convinced each group to emigrate from Europe.<sup>9</sup>

This section will pay special attention to the characteristics of the first wave. A comprehensive understanding of the motivations behind these migrants’ decision to leave their homelands, as well as their common decision to return home again, can provide a deeper insight into how a diasporic Lithuanian community took root in the United States. It was from these origins that a unique Lithuanian-American identity emerged borrowing from both Lithuanian and American values. This hybrid identity characterized the methods that Lithuanian Americans used to present the idea of Lithuanian identity to the American public, especially when Lithuanian Americans sought American support for the establishment of a Lithuanian state in 1918.

Most of the first-wave Lithuanian migrants came to the United States from a large but increasingly unstable Russian Empire. Under the tsarist government, the term “Lithuanian” referred to only one of many ethnicities subject to Russian imperial rule; Lithuania as a state did not yet exist.<sup>10</sup> While the ideas that later informed the Lithuanian nationalist movement were not completely absent, they were isolated primarily within the small circles of Lithuanian intelligentsia and gentry.<sup>11</sup> The majority of Lithuanians were instead peasants who were largely unable to access education, as the Russian Empire had banned the official use of the Lithuanian language.<sup>12</sup> This ban made it impossible for Lithuanians to establish any legal schools of their own.

This uneducated peasant group comprised the majority of early Lithuanian migrants from the Russian Empire. Between 1867



and 1869, widespread crop failures in the regions of Kalvarija, Vilkaviškis, and Suwalki catalyzed a massive migration movement to the United States.<sup>13</sup> Moreover, many Lithuanian men fled their homeland to escape conscription into the Russian army, further bolstering the growth of these communities.<sup>14</sup> Most of these Lithuanian migrants sought to fill the United States' demand for unskilled labor and worked primarily as coal miners and industrial workers.<sup>15</sup> Though the number of Lithuanian immigrants to the United States was modest in comparison to other immigrant groups, it continued to grow steadily throughout this period. The first Lithuanian community was established in Danville, Pennsylvania in 1869, and others sprung up across the East Coast and the Midwest throughout the end of the nineteenth century.

Upon reflection, these two primary reasons for Lithuanian emigration—seeking economic opportunity and fleeing conscription—do not appear to suggest any strong political agenda among Lithuanian migrants. Indeed, without a sovereign state, these migrants lacked a direct attachment to a political movement in their homeland that would provide them with any motivation to have such an agenda. As evidence presented later in this section will show, however, first-wave Lithuanian migrants brought a burgeoning sense of Lithuanian nationalism with them to the United States. This connection to a growing Lithuanian identity and a stateless Lithuanian nation suggests that many Lithuanian migrants were taking part in what would become a growing Lithuanian diaspora. As a result, Lithuanian migrants retained a connection to both Lithuanian and American values, building a combined Lithuanian-American identity.

One method of measuring the connection that Lithuanian Americans had to Lithuanian identity is through analyzing the phenomenon of re-emigration. Though the statistics collected from this period are inconsistent, most historians of Lithuanian immigration estimate that about 20 to 30 percent of Lithuanian immigrants to the United States between 1899 and 1915 re-emigrated to their Lithuanian hometowns.<sup>16</sup> This number was relatively high in comparison to other immigrant groups. Lithuanian historian Alfonsas Eidintas's data shows that 8.5 percent of Jewish immigrants, 25.1 percent of Finnish immigrants, and 41.1 percent of Russian immigrants (a statistic that likely included Lithuanians, Ruthenians, other Baltic peoples, and other ethnicities from the Russian Empire) returned to their places of origin.<sup>17</sup> In addition, demographic evidence reveals that

Lithuanian migrants primarily consisted of young, able-bodied men, suggesting that many of them did not come to the United States with the goal of putting down roots.<sup>18</sup> While women started to arrive around the 1910s, entire Lithuanian families uprooting themselves from their villages to come to the United States were rare.<sup>19</sup>

In combination with this re-emigration data, the stories of Lithuanians who remained in the United States as well as the stories of their descendants provide further evidence that the first-wave community felt a strong connection to both the United States and their homeland. In Jessie Ecker Daraska's *The Lithuanian Pioneers*, Daraska shares the personal accounts of first-, second-, and third-generation Lithuanian Americans who were eager to chronicle their family history. For some migrants, the idea of becoming American was exciting and a point of pride. One respondent to Daraska's pioneer collection tells of her father Jurgis Klimkevičius who felt that "America was a paradise" and served in World War I with the US Army.<sup>20</sup> For others, a prolonged sense of homesickness prevailed. Another respondent writes of his mother, Aleksandra Pulkis Juršenas, who felt that "Chicago was hot, sticky, muggy, and the odors terrible" and longed to return to Lithuania "where the land was ever so green."<sup>21</sup>

The Lithuanian immigrant experience was thus not universal. Some longed to return to Lithuania, while others were happy with their hybrid Lithuanian-American identity. Still others wanted to assimilate and become known as simply American as soon as possible—a common desire given the prevalent pressure to assimilate during this time.<sup>22</sup> While each migrant may have had a different perception of their national identity, Daraska's pioneer collection suggests a common trend: the connection to Lithuania and Lithuanian identity was most often not completely severed. Pride for their original homeland often coincided with a love for their new home, giving rise to a unique identity made up of both Lithuanian and American qualities.

As first-wave migrants passed down the beginnings of a blended Lithuanian-American identity to their descendants, it gradually became an identity that could stand on its own, affecting the way the migrants organized. With each new Lithuanian parish, cultural organization, restaurant, tavern, and business opened in the United States, the first-wave migrants established what would become flourishing centers for the growth of an organized Lithuanian community.<sup>23</sup> Because these spaces were

founded by and catered to Lithuanians, they served as a stage for a growing conversation surrounding what constituted Lithuanian identity and what this meant in the United States and Europe.<sup>24</sup> Importantly, the ideologies embedded within these conversations would come to influence the methods Lithuanian-American political activists used to shape American opinion of Lithuanian independence in 1918.

### **Obtaining American Support for the Republic of Lithuania (1918–1922)**

At the end of the nineteenth century, Lithuanian-American political activity centered on what ostensibly appeared to be a simple goal: being recognized as Lithuanians at all. Incoming Lithuanian migrants were often listed not as Lithuanian, but instead according to their place of origin—as Russians, or occasionally in connection to their Catholic affiliation, as Poles.<sup>25</sup> It was not until 1910 that the United States Census began to record immigrants based on their native languages, allowing incoming Lithuanians to be recognized as such.<sup>26</sup> Where census records faltered in recording accurate Lithuanian numbers, Lithuanian Americans organized into budding communities where they aimed to provide more accurate data on Lithuanian immigration.<sup>27</sup>

The events of World War I, however, radically changed this political agenda as Lithuanian Americans took a greater interest in how the European conflict affected their homeland. The Versailles Peace Conference of 1918 fundamentally reshaped the map of Europe.<sup>28</sup> The former continental European empires of the nineteenth century—including imperial Austria-Hungary and Russia—disappeared entirely. Influenced by President Woodrow Wilson’s ideas regarding self-determination for national peoples, European nationalist movements also began to manifest in the form of small nation-states.<sup>29</sup> Debate ensued as each national group argued their case for sovereignty. Ultimately, these states were welcomed into the newly formed League of Nations, including the Republic of Lithuania.

Under the leadership of Prime Minister Augustinas Voldemaras, Lithuania was established as a democratic state in 1918.<sup>30</sup> Lithuanian Americans responded to this announcement with enthusiastic support, quickly organizing to bring humanitarian relief to the infant republic. Despite President Wilson’s public support of small nation-states during World War I, however, the

United States government did not immediately recognize the new Lithuanian state and would refuse to do so until 1922.<sup>31</sup> Lithuanian Americans were thus presented with an important political goal: they needed to find a way to ensure the United States stood in full support of Lithuania's postwar independence.

Lithuanian-American political activists initially responded to the United States' policy of nonrecognition by writing extensively to Washington DC. For example, Jonas Vileišis, a representative of Lithuania, wrote to Secretary of State Robert Lansing in August 1920. Vileišis requested that there be "a change of some kind in the relations between Lithuania and America" due to recent non-aggression treaties signed between Lithuania and the Soviet Union that solidified Lithuania's status as a non-Soviet state.<sup>32</sup> Secretary Lansing responded two weeks later, instructing Vileišis to refer to a letter addressed to the Italian ambassador who had inquired about America's postwar attitude toward Russia and Poland.<sup>33</sup> The letter claimed that "the United States [felt] that friendship and honor require that Russia's interests must be generously protected...especially those concerning sovereignty over the territory of the former Russian Empire."<sup>34</sup> The reason that the United States was quick to defend a nonexistent empire was clear: it did not want to admit that the new Bolshevik government was legitimate. Since Lithuania was indeed a "territory of the former Russian Empire," Lithuanian Americans were working at a strong disadvantage to gain the American government's backing for Lithuanian sovereignty.

Because the American government refused to recognize Lithuania, Lithuanian Americans turned to the American public for support. To convince the American public to endorse an independent Lithuanian state, Lithuanian Americans felt that they first needed to obtain support for Lithuanians as a distinct national group. This task was significant, as Lithuanians comprised only one small group of the many ethnic communities that had formed in the United States in the early twentieth century. Referred to as the "Great Wave," this period of mass immigration marked a shift not only in the number of immigrants arriving on America's shores, but also in the geographic regions from which these immigrants came. The number of immigrants from Southern and Eastern Europe surpassed those from Northern Europe for the first time and continued to rise dramatically.<sup>35</sup>

As the United States industrialized, immigrants from Southern and Eastern Europe were among the many that filled the growing

labor demand. Most of them worked undesirable and low-wage jobs in factories, mines, and meat-packing facilities.<sup>36</sup> Despite this fact, nativist tensions rose steadily throughout the early twentieth century. Calls to limit the number of new immigrants became widespread, with many Americans citing concerns of competing with immigrants for jobs or resenting the foreign political ideas and cultures that they brought to the country.<sup>37</sup> Public demand ultimately pressured Congress to pass a series of immigration reforms that culminated in the Immigration Act of 1917. Backed by the increasingly powerful Immigration Restriction League, this piece of legislation was the first to officially require immigrants to pass a literacy test, strictly banning the entry of individuals who were deemed “mentally unfit.”<sup>38</sup>

The Immigration Act of 1917 was a turning point in American immigration history because it established the precedent of using the concept of “mental fitness” to target immigrants of specific nationalities and ethnicities. The act did not explicitly seek to limit the number of immigrants that came to the United States but rather to regulate the “types” of immigrants that would be allowed entry.<sup>39</sup> It marked strict criteria to measure an immigrant’s “fitness” as determined by their racial background and their ability to complete a literacy test. The contemporary hypothesis was that a literacy test could be applied more generally to prevent what eugenicists referred to as “feeble-mindedness.”<sup>40</sup> In practice, the United States used legislation like the Immigration Act of 1917 to, for the first time, put greater restraints on immigration from Europe.

For Lithuanian Americans, obtaining American support in this age of nativism was not an easy task. The literacy rate of incoming Lithuanian migrants was especially problematic. In 1912, the Immigration Restriction League collected illiteracy data that was categorized by country of origin, publishing their findings in a public pamphlet. The study showed that the illiteracy rates of immigrants hailing from northwestern European countries averaged between 0.2 percent and 6.1 percent; among Southern and Eastern European immigrants, the numbers increased to 32.4 percent for Poles, 37.6 percent for Russians, and 40.3 percent for Southern Italians.<sup>41</sup> Lithuanians were recorded to have a 49 percent illiteracy rate, the highest percentage found on this list.<sup>42</sup>

Lithuanian Americans were therefore working at a strong disadvantage that required them to disprove their reputation as a supposedly “feeble-minded” immigrant community. In an era

where the idea of the “American race” could refer to a broad range of classifications based on religion, color, class, and national origin, Lithuanian Americans felt they needed to convince the American public that they were contributing to the growth of this so-called race rather than diminishing it.<sup>43</sup> The ideals of the “American race” were heavily interconnected to the later eugenics movement and came to shape the nativist immigration policies of the early twentieth century. In a 1918 publication titled *Lithuania’s Case for Independence*, Lithuanian-American political activists assumed this logic, arguing that Lithuanians were not only a historically legitimate people but the forebears of “culture” in the northeastern region of Europe.<sup>44</sup> The text utilized tradition-based rhetoric, claiming that “the Lithuanians brought the first traces of culture and knowledge of religion to the peoples living north of them,” to imply that the Lithuanian identity aligned with early twentieth-century concepts of a civilized people.<sup>45</sup> Far from being an illiterate group of immigrants as the Immigration Restriction League portrayed, Lithuanian Americans depicted their homeland identity as culturally and racially superior.

While the government maintained its policy of nonrecognition towards the Lithuanian state, Lithuanian-American political activists applied this desirable portrayal of their homeland to their efforts to gain American support for Lithuanian statehood. For example, in a 1920 pamphlet titled *To the Friends of Lithuania*, Lithuanian-American political activist J.J. Hertmanowicz drew a connection between Lithuanian and Aryan people, equating the establishment of a Lithuanian state with an Aryan victory:

[The] ancestors of all Aryan peoples were Lithuanians. The resurrection of the Lithuanian nation should be the cause of rejoicing. It should be the occasion for a reunion of all the peoples of the Aryan race. It should result in an effort to learn the reasons for the division of Aryan peoples into separate and hostile nations. It should mean the discovery of the true basis for a League of Peoples of the World, a World-Wide Brotherhood of Man.<sup>46</sup>

The intentional description of the Lithuanian people as Aryan, or a desirable race, directly correlated with the nativist ideas that dominated contemporary American socio-political discourse.<sup>47</sup> In a time when only national peoples who were deemed legitimate could qualify for statehood, Lithuanian Americans felt they needed

to emphasize their claimed historic origins as an Aryan race. In their view, utilizing this racial appeal was essential to securing the American public's support for an independent Lithuania.

As they worked to buttress public support for statehood, Lithuanian Americans also considered how Lithuania's proximity to neighboring European immigrant groups influenced American opinion of them. Lithuania was, as it is today, a small country. Unsurprisingly, the American public was largely ignorant of its existence and its people. While the number of Lithuanians arriving in the late nineteenth century was monumental by Lithuanian standards, these migrants comprised only a small portion of Great Wave immigrants. As a result, Lithuanians were often confused with other Eastern European immigrant communities. What little material about Lithuanians that circulated from non-Lithuanian sources generally painted an unfavorable image of the Lithuanian people, including the illiteracy rates published by the Immigration Restriction League. The idea of "Lithuanian" in the minds of Americans was thus nonexistent at best and negative at worst.

To their detriment, Lithuanian Americans were also grouped together with Polish and Russian immigrants who had less than favorable reputations in the United States at the time. In 1922, American eugenicist Harry Laughlin published *Eugenical Sterilization in the United States* where he detailed his Model Eugenical Sterilization Law, listing ten classes of "socially inept persons."<sup>48</sup> Of these classes, he listed the terms "insanity" and "feeble-mindedness" as top concerns, both of which relied on subjective and unclear definitions.<sup>49</sup> These traits were often attributed to Eastern European immigrants, regardless of their exact ethnicity.<sup>50</sup> With this inaccurate ethnic grouping and nativist derision, Lithuanian Americans faced yet another obstacle in their mission to obtain the American public's support.

Lithuanian-American political activists responded to this confusion by publishing anti-Polish and anti-Russian narratives. They aimed to minimize any cultural and historical similarities to these immigrant groups and emphasize Lithuanian distinctiveness. One technique they used to create this argument was by showcasing the antiquity of the Lithuanian language, just as they had done to push the idea of the Lithuanian race. For example, in a 1918 pamphlet entitled *Lithuania: Facts Supporting Her Claim for Reestablishment as an Independent Nation*, the Lithuanian National Council emphasized the ancient and Baltic character of the Lithuanian language:



The Lithuanian people speak one of the oldest languages of the world. This tongue strikingly resembles Sanscrit [*sic*], a language which in no way resembles that of their neighbors, the Slavs and Germans. Although it was surrounded by foreign (Russian, German and Polish) influences, nevertheless, it has preserved its purity and beauty. In richness the Lithuanian [language] is only equalled [*sic*] by the English language.<sup>51</sup>

Like other twentieth-century nationalists that often used language as a means to legitimize their political mission and secure international prestige, Lithuanian Americans pointed to linguistic differences to distance themselves from their European neighbors.<sup>52</sup>

Beyond making this distinction, the overall tenor of the pamphlet suggests that the council sought to achieve two primary goals.<sup>53</sup> The first was to legitimize Lithuanian identity in the eyes of the American people. Not wanting to be grouped with their Eastern European neighbors, Lithuanian Americans aligned themselves as closely as they could with American culture. Certainly, the connection the author drew between the beauty of the English language and the Lithuanian language was not coincidental. The second goal, utterly dependent on the first, centered on ideologically legitimizing the Lithuanian state. Earlier in the pamphlet, the author argued that racial and linguistic differences between national peoples create “friction between them...unless they are granted the right of self-government.”<sup>54</sup>

It remains unclear whether this method of appealing to the American public as an avenue to secure political support was effective. While one Lithuanian-American publication in 1920 boasted of a collection of newspaper excerpts from American journalists who appeared to support the Lithuanian cause, I have yet to find any non-Lithuanian sources that share such data.<sup>55</sup> What is clear, however, is that Lithuanian Americans believed that securing a strong, positive image of Lithuania and Lithuanian identity in the American mind was paramount to obtaining American political recognition of Lithuanian statehood. When they could not gain support through political lobbying, Lithuanian Americans addressed their fellow Americans directly, utilizing specific aspects of an engineered Lithuanian identity to make the idea of Lithuania appear less foreign in American eyes.

For this technique to be successful, it was important for Lithuanian Americans to balance their Lithuanian identity with a sense of American pride. It was for this reason that they presented themes of unity and friendship throughout their post-World War I Lithuanian-American political publications (and the same reason that Hertmanowicz titled his pamphlet *To the Friends of Lithuania*). Lithuanian Americans realized that by illustrating Lithuanians as a humble but strong, democratic race of people, they could capture American attention and spread their political agenda. While the Lithuanian-American communities of the 1930s and 1940s would work from these foundations, the Lithuanian-American political work of this period was specifically tailored to appeal to a post-World War I American audience, thereby requiring a shift in tactics during World War II.

### **Obtaining American Support for Reestablishing Lithuanian Independence (1939–1950)**

First-wave Lithuanian migrants came to the United States hoping to build a more secure life for themselves and their families. They often had optimistic perceptions of the United States, as seen in the stories of Daraska's Lithuanian pioneers. The "second wave" of Lithuanian migration, by contrast, was solely political. Rather than spanning over several decades as the first wave had, the second wave was a sudden influx lasting roughly between 1939 and 1945.<sup>56</sup> These migrants were forced from their homes as a consequence of the 1939 Nazi-Soviet Non-Aggression Pact.<sup>57</sup> This pact included secret protocols that divided the Baltic region and Poland between Nazi and Soviet spheres of influence, ultimately leading to the Soviet Union's control over the Baltic States. This development left many Lithuanians with two terrible options: escape Lithuania or be taken into Nazi or Soviet military custody. No more was this true than for the prominent members of interwar Lithuanian society, which included educators, politicians, and military personnel. These populations were the most vulnerable because both the Soviet Union and Nazi Germany deemed them to be threats to their power.<sup>58</sup> The circumstances under which the second-wave Lithuanian migrants came to America were thus markedly different from those that had propelled the first wave, changing the way that the community organized.

The events leading up to the Soviet Union's first occupation of Lithuania unfolded with great speed and complexity. In spite of the non-aggression pact, it soon became clear that the Soviet Union did not want to relinquish its claims on Baltic or Polish territory, as these regions had belonged to the Russian Empire prior to World War I. In 1939, the Red Army acted on this desire and occupied Vilna, a city that Lithuanians had rigorously quarreled over with Poland throughout the previous decade.<sup>59</sup> On September 28, Germany revised the non-aggression pact and granted the Soviets control over most of Lithuania. The Soviets justified the occupation of Vilna by claiming that it would restore Lithuanian control of the city.<sup>60</sup> This was not their true intention.

In 1940, the Soviet-infiltrated Lithuanian government held a mock election wherein the Lithuanian Nationalist Party and President Antanas Smetona lost to the Lithuanian Communist Party.<sup>61</sup> In reality, only 15 to 20 percent of the eligible Lithuanian constituency actually voted.<sup>62</sup> This officially transformed the Republic of Lithuania into the Lithuanian Soviet Socialist Republic. The new government, reported to hold the support of 95.51 percent of Lithuanians, promptly requested entry into the Soviet Union.<sup>63</sup> Practically overnight, the republic passed Sovietization policies that uprooted any influence of the interwar government, resulting in many interwar Lithuanian leaders being imprisoned or exiled without trial throughout 1940 and 1941.<sup>64</sup>

Unfortunately, this would not mark the end of Lithuania's troubles. Nazi Germany invaded the small Baltic state in July 1941, forcing Lithuanians to pledge loyalty to a different side of the war. In every sense, Lithuania erupted into chaos. Many Lithuanians were arrested on suspicion of being pro-Soviet. Lithuania's large Jewish population was the most vulnerable. It is estimated that over 75,000 Lithuanians, most of Jewish descent, were deported to Third Reich concentration camps.<sup>65</sup> By 1944, the Soviet Union regained control of Lithuania in a series of maneuvers that Soviet historians claim "liberated" Lithuania from Nazi power.<sup>66</sup> This was the start of the second Soviet occupation of Lithuania, which lasted until the fall of the Communist Bloc.

The refugees of the second wave of Lithuanian migration thus came from a Lithuania that had been repeatedly tossed around, torn apart, and divided up between the two major European powers of World War II. Neither pro-Nazi nor pro-Soviet, these migrants came to the United States to escape deportation to Soviet work camps in Siberia. An estimated 100,000 Lithuanians,

70 percent of which were women and children, were sent to these work camps between 1940 and 1953.<sup>67</sup> In the end, of the over 700,000 displaced Lithuanians (one-third of the population of Lithuania at the time), approximately 28,000 resettled in the United States.<sup>68</sup> Even Antanas Smetona, the former Lithuanian president, came to the United States in 1941, arriving in New York and ultimately settling in Cleveland.<sup>69</sup> Rather than aspiring to create a state like the previous Lithuanian émigré wave, these Lithuanian activists sought to restore an existing state that had been violently taken from them.<sup>70</sup>

The first step in achieving this goal was telling the Americans why they had come. While the first-wave migrants embraced both Lithuanian and American values in their political publications, the second-wave migrants did not share this connection to a hybrid Lithuanian-American identity. They instead came to the United States bearing what Lithuanian-American historian Antanas J. Van Reenan refers to as the “sacred mission,” wherein Lithuanians would “redeem an unjust past, recreate their present and through these envision their future.”<sup>71</sup> They were loyal members of the lost Republic of Lithuania, exiled to the United States “with a value system ideologically geared to oppose assimilation into a numerically superior society.”<sup>72</sup> Unlike the first wave, who held only a vague sense of belonging to a distinct Lithuanian national identity, second-wave Lithuanian migrants arrived with an agenda in hand, determined to preserve the values of their lost nation-state.

The World Lithuanian Charter is one example of Lithuanian-American material that illustrates how the second wave conceptualized the “sacred mission.” Drafted by the VLIK (the League for the Liberation of Lithuania that published Colonel Petraitis’s autobiography) in collaboration with the Lithuanian American Council, this charter served as a guide to Lithuanian culture for present and future generations of Lithuanians living in the United States.<sup>73</sup> It was significant in its ability to provide a clear view of how Lithuanian nationalists during this period defined Lithuanian identity.<sup>74</sup> Their definition was so well-conceptualized that it could be articulated in a numbered list of “thirteen points geared to providing a worldview for present and future generations living in diaspora.”<sup>75</sup> The charter encouraged Lithuanian migrants to learn about their culture by reading the Lithuanian language, studying Lithuanian history, and joining Lithuanian organizations.<sup>76</sup> Unlike their first-wave predecessors,

the “sacred mission” of second-wave Lithuanian refugees left no room to reconcile their Lithuanian identity with American values.

Armed with a shared political agenda and conception of Lithuanian identity, the Lithuanian-American community quickly moved to unite their existing organizations and appeal for Lithuanian sovereignty. For this unification to be effective, it became necessary for Lithuanians to operate almost exclusively under the authority of the Lithuanian National Council.<sup>77</sup> In a 1943 publication from the *Lithuanian Bulletin*, an English-language Lithuanian-American newspaper, the Lithuanian National Council claimed to represent the four major political parties of Lithuania (listed as “Christian Democrats,” “Liberals,” “Social Democrats,” and “Jews”) and that it thus represented 90 percent of all Lithuanians.<sup>78</sup> Whereas independent Lithuanian activists often published early Lithuanian-American work, the council and its affiliate organizations published the vast majority of political material from this period.

In addition to the organizational transformation within Lithuanian-American circles, the United States’ socio-political landscape also changed during this period. The post-World War I foreign policies of President Wilson, who championed the idea of self-determination, gave way to President Roosevelt’s more reserved policies of World War II, which left little room for involvement in the Baltic region.<sup>79</sup> Moreover, the United States now maintained an unsteady alliance with the Soviet Union—one of Lithuania’s oppressors—despite growing feelings of anti-Soviet and anti-communist inclinations among the American public.<sup>80</sup> This new American climate, combined with the influence of second-wave Lithuanians, influenced the methods that the Lithuanian-American community used to appeal to Americans for political support.

While it appeared that the US government was allied with the Soviet Union against Nazi Germany, the relationship between the two powers had been strained since the mid-1930s.<sup>81</sup> In 1935, William Bullitt, the United States’ first ambassador to the Soviet Union, condemned the USSR’s mock elections and proclaimed that “he had not met a single American who had offered a ‘good word’ for the Soviet Union.”<sup>82</sup> In 1941, the United States took a political stance against the Soviet Union’s territorial advances in Europe by incorporating the Baltic States into the Stimson Doctrine of Nonrecognition. The federal government originally adopted this doctrine in 1932 to proclaim nonrecognition of international

territorial changes made by force.<sup>83</sup> By adding the Baltic States to this doctrine, the United States broadcasted that they did not support the Soviet Union's actions in the Baltic region and would not legally recognize the incorporation of the Baltic governments into the USSR.<sup>84</sup>

Morally, the Soviet Union's annexation of the Baltic States went against the values that the United States had championed during the post-World War I period: the rights of a national people to self-determination within Europe. Under President Wilson, who had helped to establish November 1 as "Lithuania Day" in New York, the United States had ideologically stood in full support of small nation-states.<sup>85</sup> In 1922, the United States had officially recognized the reality of an independent Lithuania. It was this environment of American moral and ideological support that the Lithuanian National Council sought to galvanize. In theory, the United States stood as Lithuania's most promising ally. Convincing the United States to militarily act on these values in support of a small, war-torn nation-state was, however, quite difficult.

As a result, Lithuanian Americans felt they needed to utilize a different approach to convince the United States to support Lithuania as a legitimate political reality, not merely as a Wilsonian concept. Indeed, the language that they used in their publications highlights this distinction. In *An Appeal to Fellow Americans on Behalf of the Baltic States*, a pamphlet published in August 1944, the Lithuanian National Council urged the American public to stand against the Soviet Union's actions in the Baltic States. They argued that the Soviet Union had "accepted the principles of the Atlantic Charter," which bound it to "seek not aggrandizement, territorial or other, to respect the right of all peoples to choose the form of government under which they will live."<sup>86</sup> The council further reminded its audience of the United States' historical view of the Baltic States in the aftermath of World War I, claiming that "although these Republics [the Baltic States] are recognized as independent states by the United States and by other Democracies, they are claimed by the Soviets as part of the U.S.S.R."<sup>87</sup>

Unlike the political material of the post-World War I period, this pamphlet was not primarily concerned with presenting a desirable form of Lithuanian identity to its readers. Rather, the publication focused on the atrocities committed by the Soviet Union, depicting it as an oppressive power that was operating in violation of international law. An emphasis on legal transgressions characterized the remainder of the pamphlet, with the author

also condemning Nazi-Soviet collaboration: “[The collapse of the interwar Baltic governments] is due to the Nazi-Soviet collaboration in aggression prior to June 1941, and to forces altogether beyond their control.”<sup>88</sup> By denouncing the actions of both Nazi Germany and the Soviet Union, the council justified the legitimacy and continued existence of the exiled Lithuanian government.

*An Appeal to Fellow Americans* was published in 1944, the same year that the number of second-wave Lithuanian refugees arriving in the United States hit its peak.<sup>89</sup> It is perhaps for this reason that the Lithuanian National Council released *Supplement to the Appeal to Fellow Americans* just two months after the original. The supplement, while still focused on restoring the independence of the Baltic States, took an abrupt shift in tone:

This Appeal [the original pamphlet] received considerable attention throughout the country. In the meantime, all available information regarding the events in the Baltic States tends to point to a rapid deterioration of the situation there: the Peoples of Lithuania, Latvia, and Estonia are facing *total extinction* at the hands of our German enemies and at the hands of special detachments following in the wake of advancing troops of our Russian Ally. Unless the civilized world intervenes immediately—we fear that there will be no point in discussing an application of the noble principles of the Atlantic Charter and other solemn declarations by the United Nations to the Peoples of the Baltic States, inasmuch as *there will be no Baltic peoples left in their ancestral homelands* with events taking on a tragic aspect.<sup>90</sup>

Both pamphlets illuminated and condemned Soviet and Nazi atrocities. The council directly stated in the original pamphlet that the Baltic peoples “reject both Nazism and communism because they consider both systems totalitarian, imperialistic, and anti-democratic.”<sup>91</sup> This language suggests that second-wave political activists sought to convince Americans of what was already in the back of their minds—that they were actually entangled in a struggle between two European enemies, not one. Their mission was thus not only to gain American support for Lithuanian independence, but to convince Americans to punish the Soviet Union. Atrocity and political blame distinguished their publications, implying that Lithuanian migrants believed they needed to shock the American



public into pressuring the United States to take immediate liberative action in the Baltic States.

Lithuanian Americans also utilized their Catholic identity to gain American sympathy and further bolster their anti-Soviet rhetoric. While the Lithuanian National Council did not publish political material with explicit references to Catholicism, independent Lithuanian authors included references that suggest Lithuanian nationalists of this period wanted to portray Lithuanians as a pious, Catholic people. Because the VLIK sought to unify the Lithuanian political voice in diaspora, other Lithuanian-American publications that were not directly published under the VLIK or the council can be understood as reflections of the Lithuanian national platform more broadly. For this reason, it is worth exploring the role of Catholicism in Lithuanian-American publications to discern how Lithuanian Americans used their status as a “Christian country” to achieve their political goals in the United States, especially as the Cold War loomed.

In 1946, the Lithuanian Catholic Congress published a pamphlet directly addressed to the Lithuanian-American community, calling upon them to exert their political influence. The Catholic Congress reminded Lithuanian Americans that “the American people want decency and fair play in governments” and they “cannot acquiesce in the oppression and persecution of the overwhelming majority of the peoples [Catholic Lithuanians] by an insignificant and armed minority of the atheistic communist party.”<sup>92</sup> Furthermore, the pamphlet referred to Lithuania and its neighboring nations of Latvia and Estonia as “Christian countries.”<sup>93</sup> By doing so, the Catholic Congress hoped to remind the Lithuanian-American community that dedication to Christianity was an important American value. In contrast, it presented atheism as a communist ideology that the American public vehemently opposed.

As the United States moved into the early years of the Cold War, references depicting the United States as a pious country became increasingly vital. The American public viewed atheism as one of the Soviet Union’s most characteristic features. It therefore became essential for American anti-Soviet propaganda to bolster an image of the God-fearing American as the anti-communist antidote.<sup>94</sup> Colonel Petruitis, the pious war hero in *Lithuania Under the Sickle and Hammer*, was an early example of Lithuanian-American political activists mirroring this American social agenda. In 1947, for example, the envoys of the Baltic States cited Petruitis’s autobiography in an organized appeal addressed to the

president of the General Assembly of the United Nations.<sup>95</sup> The appeal's goal was to illustrate the violence and atrocity occurring in the Soviet Union. With Colonel Petraitis, the envoys aimed to exemplify the apparently good and pious Lithuanian victims of Soviet aggression. The autobiography was also originally published by the VLIK and translated into English for an American audience, providing further evidence that it was written with a political agenda in mind.

Such references to Lithuanians as a Christian people became essential as anti-communist Cold War sentiment continued to flourish in the United States. Though the Lithuanian National Council did not voice its connection to Catholicism directly in its official political publications, independent Lithuanian refugees utilized this appeal in their own eyewitness accounts of atrocity under Soviet rule. They provided shocking descriptions of Soviet religious persecution in Lithuania, including the burning of Catholic texts, the destruction of religious folk art and statues, and the deportation or murder of Lithuanian priests and bishops.<sup>96</sup> In effect, this depiction of Lithuanians as a Catholic people under persecution presented the plight of the Lithuanians, as well as the loss of the Lithuanian state, as the perfect American Cold War propaganda.

Similar to the first-wave migrants, it is difficult to measure how effective the second-wave migrants were in convincing the American public to side with their mission. At the beginning of the war, it appeared that President Roosevelt's support for Wilsonian values would make him a strong ally for the Baltic cause.<sup>97</sup> He had staunchly supported the Atlantic Charter and, most importantly, supported the addition of the Baltic States to the Stimson Doctrine of Nonrecognition. By extending the protection of the Stimson Doctrine to the Baltic States, the United States effectively declared that it did not endorse the Soviet Union's actions in the Baltic region as well as broader acts of territorial aggrandizement in Europe.<sup>98</sup> Through this doctrine, the United States responded to the Baltic struggle with a formal judgment that deepened tensions with the Soviet Union.

Unfortunately, the official American foreign policy toward the Baltic region betrayed the ideals of both the Atlantic Charter and the Stimson Doctrine. The issue of the Baltic States was briefly brought up at the Big Three Conference in Tehran:

The President told Stalin that there were a number of persons of Lithuanian, Latvian, and Estonian origin, in that order, in the United States. He said he fully realized the three Baltic republics had in history and again more recently been part of the USSR and added jokingly that when the Soviet armies reoccupied these areas, he did not intend to go to war with the Soviet Union on this point.<sup>99</sup>

The result was clear: the United States would not intervene militarily to liberate the Baltic States. Despite the Stimson Doctrine's moral condemnation of the Russian occupation of the Baltic States, Roosevelt's idealism, along with the political freedom of the Baltic States, failed to take on a tangible form.<sup>100</sup>

The political material that the council published during this period suggests that Lithuanian Americans, along with the exiled Latvian and Estonian communities that came with them, were not blind to the opposing American political tides. Under the leadership of the second-wave refugees, the Lithuanian National Council emphasized atrocity, loss, and anti-Sovietism. By portraying Lithuania as a nation-state deprived of its freedom and subject to political violence, the published material sought to shock the American audience into taking immediate action. Unlike the first wave's political agenda, the urgency of the second wave's "sacred mission" left little room for entertaining ideas of an emerging Lithuanian identity in combination with American pride. Instead, second-wave migrants sought to garner enough public support to persuade the United States government to act upon its stated principles of self-determination and freedom for democratic peoples.

### **Conclusion**

Despite the Lithuanian-American community's attempts to gain support for reestablishing Lithuania's independence, Lithuania remained a Soviet Socialist Republic at the conclusion of World War II. Their efforts to obtain American support for restoring the interwar government, however, only grew more active throughout the century. As the United States transitioned into the Cold War era, Lithuanian Americans continued to publish material that appeared to utilize a similar approach to the World War II method. These works showcased atrocity and a negative image of life in Lithuania under communism, including an exhibit published

in 1970 titled *Know Your Enemy, Communism* that displayed graphic photos of suffering in the Soviet gulags.<sup>101</sup> The Lithuanian American Council also published several books and booklets, with titles such as *Presenting Lithuania: Gateway between West and East* (1960s), *Lithuania Must be Free: Congressional Voices for Lithuania's Independence* (1981), and *Let's Struggle Against Colonial Enslavement* (1986). Just as they had during and immediately after World War II, Lithuanian Americans appealed to the growing anti-Soviet and anti-communist frenzy during the Cold War to capture the attention of the American public.

What set the stage for this approach, however, was the shift in the Lithuanian-American community's organization and political approach between the post-World War I and World War II periods, which has been the focus of this paper. While their core goal of mustering public support for Lithuanian sovereignty remained the same, the methods Lithuanian Americans utilized to achieve this goal differed greatly in each period. The language used in Lithuanian-American political material of the post-World War I period illustrated an attempt to unite their old and new lives into a combined Lithuanian-American identity that placed equal emphasis on both Lithuanian and American components. This emphasis is largely absent from the political work published during World War II under the influence of the second-wave refugees. Upon their arrival, the political agenda of the World War II era took a dramatic shift to focus squarely on the Soviet Union's violation of human rights as well as its failure to abide by international law. The tone shift with respect to the United States is significant, with the Lithuanian-American community championing the American values of Wilsonian self-determination in one period and condemning the failure of the United States to uphold these same values in the next.

Lithuanian Americans were also not blind to a second changing factor—the shifting opinions and political tides of the United States. In both eras, Lithuanian Americans utilized particular appeals and language in an attempt to rally the American public to their side. In the post-World War I period, this approach meant differentiating Lithuania and Lithuanian identity from neighboring European nationalities and instead depicting Lithuanians as suitable members of the “American race.” During the World War II period, these appeals changed, emphasizing Lithuanians as a persecuted Catholic people in order to meet rising American Cold War fears. It remained crucial for Lithuanian Americans in each of

these eras to be constantly aware of the United States' ever-shifting socio-political landscape. They needed to portray Lithuania in a way that Americans would find palatable, even if this meant presenting slightly different versions of Lithuanian identity and the Lithuanian historical narrative.

What this shift in the Lithuanian-American political approach in the United States can provide, therefore, is an example of how the values of a twentieth-century nationalist movement in diaspora could be bent and changed to serve a specific political purpose. To successfully gain American support for the Lithuanian state, yet still maintain the nationalist platform of their homeland, the Lithuanian-American community needed to delicately balance Lithuanian and American values in a manner that would satisfy each side. The intricate design of the Lithuanian political movement in diaspora proves that a wealth of thought, planning, and discourse went into writing and publishing their political work. Close analysis of these publications therefore reveals a larger argument about twentieth-century diaspora politics in the United States, perhaps suggesting that this method could be applied to other diasporic populations that came to the United States during this time.

1. Col. Jonas Petraitis, *Lithuania Under the Sickle and Hammer* (Cleveland: The League for the Liberation of Lithuania, 1950), p.15.
2. Petraitis, *Under the Sickle and Hammer*, p. 15.
3. Petraitis, *Under the Sickle and Hammer*, p. 15.
4. Petraitis, *Under the Sickle and Hammer*, p. 15.
5. Petraitis, *Under the Sickle and Hammer*, p. 15.
6. Petraitis, *Under the Sickle and Hammer*, p. 14.
7. When referencing “Lithuanian migrants” and “Lithuanian Americans” in this article, I am discussing the political material published from the most prominent and allegedly official Lithuanian-American political organizations. These organizations operated primarily under the leadership of Roman Catholic Lithuanian nationalists. It is important to note that many other migrants from Lithuania who did not fall into this category also came to the United States during the two waves of migration. These groups included Lithuanian Jews, Lithuanian Protestants, and Lithuanian Socialists.
8. Algirdas M. Budreckis, ed. and comp., *The Lithuanians in America, 1651–1975: A Chronology & Fact Book* (Dobbs Ferry, NY: Oceana Publications, 1976), pp. 162–63.
9. Budreckis, ed. and comp., *Lithuanians in America*, pp. 162–63.
10. Alfonsas Eidintas, *Lithuanian Emigration to the United States: 1868–1950*, trans. Thomas A. Michalski (Vilnius, LT: Mokslo ir enciklopedijų leidybos institutas, 2003), p. 58.
11. Antanas J. Van Reenan, *Lithuanian Diaspora: Königsberg to Chicago* (Lanham, MD: University Press of America, 1990), pp. 5–10.
12. Van Reenan, *Lithuanian Diaspora*, pp. 5–10.
13. Eidintas, *Lithuanian Emigration*, p. 58.
14. Eidintas, *Lithuanian Emigration*, p. 60.
15. Eidintas, *Lithuanian Emigration*, p. 75.
16. Eidintas, *Lithuanian Emigration*, p. 67.
17. Eidintas, *Lithuanian Emigration*, p. 67.
18. Eidintas, *Lithuanian Emigration*, pp. 60–61.
19. Eidintas, *Lithuanian Emigration*, pp. 60–61.
20. Jessie Ecker Daraska, *The Lithuanian Pioneers: A Study of Lithuanian Immigration to the United States Before World War I* (Chicago: John R. Daraska, 2000), p. 92.
21. Daraska, *Lithuanian Pioneers*, p. 89.
22. William Loren Katz and Laurie R. Lehman, eds., “From Lithuania to Chicago,” in *The Cruel Years: American Voices at the Dawn of the Twentieth Century* (Boston: Beacon Press, 2003), pp. 182–200.
23. Eidintas, *Lithuanian Emigration*, p. 89.
24. Budreckis, ed. and comp., *Lithuanians in America*, pp. 79–90.
25. Van Reenan, *Lithuanian Diaspora*, p. 41.
26. Van Reenan, *Lithuanian Diaspora*, p. 43.
27. Van Reenan, *Lithuanian Diaspora*, p. 44.

28. Michael D. Richards and Paul R. Waibel, *Twentieth-Century Europe: A Brief History, 1900 to the Present* (Hoboken: John Wiley & Sons, 2014), pp. 3–15.
29. Richards and Waibel, *Twentieth-Century Europe*, pp. 82–87.
30. Raimundas Lopata, “Lithuanian-Polish Cooperation in 1918: The Roniker-Voldermaras Treaty,” *Journal of Baltic Studies* 24, no. 4 (1993): 350.
31. Eidintas, *Lithuanian Emigration*, pp. 117–18.
32. Tyler Dennett and Joseph V. Fuller, eds., *Papers Relating to the Foreign Relations of the United States, 1920: Russia*, vol. III (Washington: Government Printing Office, 2010), pp. 659–60.
33. Vileišis was also instructed to refer to two other letters neither of which have been made public. Dennett and Fuller, eds., *Papers Relating to the Foreign Relations of the United States*, pp. 659–60.
34. Dennett and Fuller, eds., *Papers Relating to the Foreign Relations of the United States*, p. 463. Note that the October 15 letter has also not been made public.
35. “The ‘New Immigration’ and Its Effects,” in *An Immigrant Nation: United States Regulation of Immigration, 1798–1991* (Washington, DC: US Department of Justice, Immigration & Naturalization Service, 1991), p. 9.
36. Eidintas, *Lithuanian Emigration*, p. 60.
37. “The ‘New Immigration’ and Its Effects,” p. 11.
38. Concerns over the mental and physical fitness of an individual immigrant emerged long before the passing of the Immigration Act of 1917. For example, in 1898, one bill was proposed which called for greater protection against the admission of those deemed to be insane, wherein the immigrant would only be allowed entry if they possessed a certificate from an American surgeon that verified their own sanity along with having no relation to anyone who had been deemed insane. *A Bill to Amend the Immigration Laws of the United States Relative to the Insane of 1898*, S.B. Res. 10342, 55th Cong., 2nd session (1898), accessed via Harvard College Library Digital Imaging Group.
39. “The ‘New Immigration’ and Its Effects,” p. 11.
40. Immigration Restriction League, *Immigration Figures for 1912* (Boston: Immigration Restriction League, 1912), p. 3. For a definition on “feeble-minded,” see Nancy Ordover, *American Eugenics: Race, Queer Anatomy, and the Science of Nationalism* (Minneapolis: University of Minnesota Press, 2003), p. 4.
41. Immigration Restriction League, *Immigration Figures for 1912*, p. 3.
42. Immigration Restriction League, *Immigration Figures for 1912*, p. 3.
43. Ordover, *American Eugenics*, p. 4.
44. Ordover, *American Eugenics*, p. 4.
45. T. Norus and J. Zilius, *Lithuania’s Case for Independence* (Washington, DC: B.F. Johnson, 1918), p. 7.
46. J.J. Hertmanowicz, *The Lithuanians: To the Friends of Lithuania* (Lithuanian Council of Chicago, 1920), p. 5.



47. Ordover, *American Eugenics*, p. 29.
48. Ordover, *American Eugenics*, p. 29.
49. Ordover, *American Eugenics*, p. 29.
50. Ordover, *American Eugenics*, p. 29.
51. J.J. Bielskis, comp., *Lithuania: Facts Supporting Her Claim for Reestablishment as an Independent Nation* (Washington, DC: Lithuanian National Council, 1918), p. 8.
52. Liah Greenfeld, *Nationalism: A Short History* (Washington, DC: Brookings Institution Press, 2019), p. 26.
53. There is an exception to this linguistic nationalism, however, in Lithuanian claims for drawing Lithuania's national boundaries. A conscious effort was made to declare individual Lithuanian princes the founders of historically "Lithuanian" cities. This was done in much part to prevent Lithuanians from undermining nationalist efforts as they disputed claim over Vilna, a predominantly Polish-speaking city, with Poland in 1920. For more on this specific dispute, see Alfred Elrich Senn, *The Great Powers, Lithuania and the Vilna Question, 1920–1928* (Leiden: E.J. Brill, 1966).
54. Bielskis, comp., *Lithuania: Facts Supporting Her Claim*, p. 5.
55. P. Molis, *The American Press on Lithuania's Freedom* (Brooklyn: T. Fondas, 1920).
56. Eidintas, *Lithuanian Emigration*, p. 204.
57. Eidintas, *Lithuanian Emigration*, p. 204.
58. Eidintas, *Lithuanian Emigration*, p. 204.
59. Senn, *Lithuania in 1940*, p. 12.
60. Senn, *Lithuania in 1940*, p. 17.
61. Leonas Sabaliūnas, *Lithuania in Crisis: Nationalism to Communism 1939–1940*, (Bloomington: Indiana University Press, 1972), p. 187.
62. Robert A. Vitas, *The United States and Lithuania: The Stimson Doctrine of Nonrecognition* (New York: Praeger, 1990), p. 12.
63. Vitas, *United States and Lithuania*, p. 12.
64. Eidintas, *Lithuanian Emigration*, p. 205.
65. Daiva Dapkutė, "Lithuanian Diaspora: From Displaced Persons to Diaspora Politics," in *Population Displacement in Lithuania in the Twentieth Century: Experiences, Identities and Legacies*, ed. Tomas Balkelis and Violeta Davoliūtė (Leiden, Neth: Koninklijke Brill, 2016), p. 237.
66. Dapkute, "Lithuanian Diaspora," p. 237.
67. Dovilė Budrytė, "We Call it Genocide: Soviet Deportations and Repression in the Memory of Lithuanians," in *The Genocidal Temptation: Auschwitz, Hiroshima, Rwanda, and Beyond*, ed. Robert S. Frey (Dallas: University Press of America, 2004), p. 80.
68. Budreckis, ed. and comp., *Lithuanians in America*, p. 41.
69. Budreckis, ed. and comp., *Lithuanians in America*, p. 37.
70. There has been discussion on whether the deportation of Lithuanians, Latvians, and Estonians under Soviet occupation should be considered a genocide, and whether the Baltic States should receive reparations from

Russia as a result. For further reading on this topic, see Budrytė, “We Call it Genocide,” pp. 79–100.

71. Van Reenan, *Lithuanian Diaspora*, p. 146.

72. Van Reenan, *Lithuanian Diaspora*, p. 146.

73. Van Reenan, *Lithuanian Diaspora*, p. 142.

74. The VLIK also operated as the Lithuanian government in exile.

75. Van Reenan, *Lithuanian Diaspora*, p. 142.

76. Van Reenan, *Lithuanian Diaspora*, p. 143.

77. In Lithuanian-American publications, the Lithuanian National Council and the Lithuanian Council of America refer to the same institution; the Lithuanian Council of America is the American branch of the Lithuanian National Council. All other committees of different names I discuss in this section operated in close cooperation with the council, with the exception of Lithuanian-American communist organizations. For further reading, see Eidintas, *Lithuanian Emigration*, p. 210.

78. “Lithuanian Political Parties and the Lithuanian National Council,” *The Lithuanian Bulletin*, April 28, 1943.

79. Carol Silverman, “The American Jewish Community, the Roosevelt Administration, and the Holocaust,” in *Franklin D. Roosevelt and the Formation of the Modern World*, ed. Thomas C. Howard and William D. Pederson (London: Routledge, 2003), p. 204.

80. Lithuania was also occupied by Nazi Germany. This is not absent from Lithuanian-American political material during this period; however, atrocities by the Soviet Union were emphasized to convince the American public that the Red Army was not liberating the Baltic States as they had claimed but was instead occupying the region. For more on the dual-occupation of Lithuania, see Sabaliūnas, *Lithuania in Crisis*.

81. William E. Kinsella, “Franklin D. Roosevelt and the Soviet Union,” in *Franklin D. Roosevelt and the Formation of the Modern World*, ed. Thomas C. Howard and William D. Pederson (London: Routledge, 2003), p. 81.

82. Kinsella, “Franklin D. Roosevelt,” p. 81.

83. Kinsella, “Franklin D. Roosevelt,” p. 81.

84. Kinsella, “Franklin D. Roosevelt,” p. 81.

85. Display text, “No Home to Go To: The Story of Baltic Displaced Persons from 1944–1952,” *President Wilson Declares A Lithuanian Day*, Balzekas Museum of Lithuanian Culture, Chicago, IL.

86. Lithuanian American Information Center, *An Appeal to Fellow Americans on Behalf of the Baltic States by United Organizations of Americans of Lithuanian, Latvian and Estonian Descent* (New York: Lithuanian American Information Center, 1944), p. 3. The Lithuanian American Information Center was a service of the Lithuanian National Council.

87. Lithuanian American Information Center, *An Appeal to Fellow Americans*, p. 3.

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90. Lithuanian American Information Center, *Supplement to the Appeal to Fellow Americans on Behalf of the Baltic States by United Organizations of Americans of Lithuanian, Latvian and Estonian Descent* (New York: Lithuanian American Information Center 1944), p. 3.
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# Religious Patronage as a Woman's Power

The Regency of Countess Blanche of Navarre

*Madeleine Gaynor*

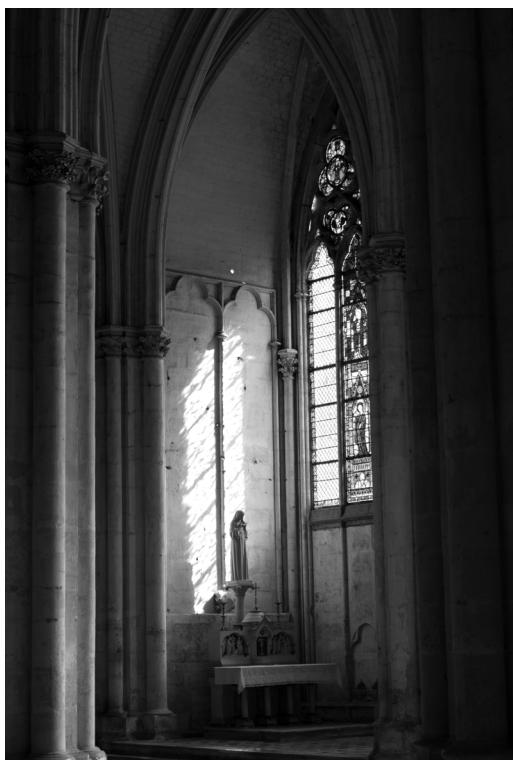


Image: *Statue of Maria in Troyes Cathedral France* (Troyes, France: Bennekom/Shutterstock.com, 2018), accessed [online](#).

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Madeleine Gaynor is a junior at Princeton University from Chicago, Illinois, concentrating in history with a certificate in medieval studies. She is particularly interested in France during the High Middle Ages. Next year, Madeleine plans to continue her research on women and Christianity in medieval Europe. This paper was written for Dr. Randall Pippenger's junior seminar "Privilege and Power: Elites in Premodern Europe" in Fall 2020.

Near the conclusion of a persistent civil war, Blanche of Navarre, Countess of Champagne (r. 1201–1222), sought the guidance of a local monk named Gerard. She asked him to find a holy man to assist her through prayer in her moment of crisis. Gerard pointed Blanche to Arnulf, lay brother of Villers, as a spiritual advisor. Goswin of Bossut, the cantor of Villers and author of “Life of Arnulf,” chronicled this interaction. According to Goswin of Bossut, Arnulf was graced with a heavenly revelation, providing him the answer to Blanche’s troubles: if she would form a “monastery for Cistercian nuns, even as soon as she but conceives in her heart the will to do it, all that dispute going on between her and her detractor will be put to rest, and concord will ensue.”<sup>1</sup>

Writing about Blanche, Goswin of Bossut introduced the countess as a noble and faithful ruler who was “practically destitute of both human aid and human counsel” at the time of her request.<sup>2</sup> Goswin’s description indicated a contemporary perception of the countess as both trusting in the religious community and personally faithful, as she received Arnulf’s advice with great joy.<sup>3</sup> Confirming Goswin’s account, Blanche indeed founded and endowed the Cistercian convent of Argensolles and ultimately prevailed in the war.<sup>4</sup> By founding the convent, Blanche engaged in religious patronage—financial or other aid given to a religious institution—as a critical component of her political strategy. Goswin’s implication that Blanche would not have turned to religious patronage as a strategy unless directed to do so, however, creates a misleading impression of Blanche’s capacity as a ruler. She in fact demonstrated both her devout religiosity and tenacious political leadership through religious patronage years before Arnulf supposedly came to her aid.

Understanding how Blanche’s religious patronage intersected with her political leadership requires historical contextualization. Blanche of Navarre became regent countess of the French county of Champagne in May 1201 after her husband, Thibaut III (r. 1198–1201), passed away during preparations for the Fourth Crusade. In the time of the crusades, this was not an uncommon occurrence as husbands increasingly left and risked their lives for religious glory. Entrusting their domestic duties to their wives, husbands often died before their sons reached twenty-one years old, the designated age of succession.<sup>5</sup> When her husband passed, Blanche was only weeks away from giving birth to her son, Thibaut IV. Because Thibaut would not assume personal rule over

Champagne until 1222, Blanche was required to assume a maternal regency.<sup>6</sup> Between 1181 and 1256, maternal regencies such as Blanche's, when a mother ruled in her young son's stead, became increasingly important. These maternal regencies ruled the county about half of the time.<sup>7</sup>

The focal point of Blanche's rule was the War of Succession throughout her second decade as countess. During this period, she remained steadfastly vigilant, despite repeated challenges to her regency and her son's succession. These challenges were a result of the complicated web of succession rights that Blanche's late husband and brother-in-law had created. Before his death, Thibaut III had acquired the county as expected when his older brother, the previous count, passed away during the Third Crusade in 1190.<sup>8</sup> But, while the previous count was in Jerusalem, he had sired two daughters: Alice and Philippa.<sup>9</sup> This gave Philippa and her eventual husband, Erard of Brienne, a legitimate claim over Champagne, keeping Blanche on high alert for most of her regency. The daughters were too young at the time of Thibaut III's death to interfere, but they began to pursue what they believed to be a well-founded right to the county a decade later when Philippa married Erard of Brienne.<sup>10</sup> Erard and Philippa's persistent and violent quest for the county of Champagne challenged Blanche at every moment until her final victory in 1218. Nonetheless, Blanche resolutely defended the rights of her descendants throughout her twenty-one-year rule, from her first homage to the king in 1201 to the final quitclaim of the county by Erard and Philippa to Blanche and her son in 1222.<sup>11</sup>

Although discussion of the War of Succession is essential to her rule, existing historiography on Blanche of Navarre focuses overwhelmingly on the conflict. Historians Theodore Evergates and Katrin E. Sjursen have devoted significant analysis to the war, insightfully examining Blanche's role as a military and political leader. Still, they treat Blanche's first decade in power and religious life as merely background to the civil war's main conflict. Discussions of Blanche have neglected a detailed treatment of her religious patronage, a necessary element of any comprehensive account of her regency. In discerning the extent to which religious patronage coincided with Blanche of Navarre's leadership and decision-making, I will draw upon the significant primary source evidence available from Blanche's rule. Theodore Evergates's edited compilation of the charters involving the countess in *The Cartulary of Blanche of Champagne*, as well as Henri d'Arbois de

Jubainville's 1863 translated compilation of charters from Blanche's regency in *Histoire des ducs et des comtes de Champagne*, provide ample documentation of Blanche's legal action and patronage.<sup>12</sup> A comparison of Blanche's charters to existing historiography of the War of Succession will allow me to evaluate the intersection of her religious patronage and the unfolding events of the conflict.<sup>13</sup>

In this paper, I will reveal how Blanche of Navarre implemented religious patronage as strategic policy, arguing that Blanche applied her preexisting religious inclinations to secure victory not only for herself but for her son and descendants as well. An analysis of Blanche's religious patronage, beyond its cruciality to a comprehensive view of her regency, contributes to a broader understanding of female rulership in the thirteenth century. This analysis will include a comparison of Blanche of Navarre to other contemporary women in power to show how patronage was one strategy for aristocratic women to expand their authority.<sup>14</sup> However, it is important to note that Blanche's religious patronage was not just political. "The Life of Arnulf" and similar accounts demonstrate that Blanche's personal faith existed independent of political policy and political expediency. Even as thirteenth-century women such as Blanche publicly patronized the Church, their religion was not merely a manipulative tool. Patronage could be an expression of faith and a powerful device for aristocratic women.

### **Acquiring Salvation, Amassing Strength: Patronage of the Religious Institutions of Champagne**

The county of Champagne at the turn of the thirteenth century was a fundamentally religious world. The clergy possessed as much, if not more, political influence than the laity. Within the feudal framework of the county, ecclesiastical lords held land alongside their secular counterparts, and bishops and monasteries created fiefs from their own lands.<sup>15</sup> Relationships with religious institutions—monasteries, hospitals, and the secular clergy—mattered to the individual inhabitants of Champagne both because of the feudal role of the clergy and because such relationships were a vital means for people to secure passage to heaven through patronage. While the protection of the soul may seem like a personal or intimate matter, individuals interacted with religious institutions through legal means. Their exchanges were thus unavoidably public. In her cultivation of a relationship with the religious community, Blanche's outreach and patronage



encompassed all types of religious institutions. Each relationship served a different purpose. Not every interaction in Blanche's charters, of which there were hundreds, had a single definite objective—secular, spiritual, or otherwise. However, analysis of her patronage over a twenty-one-year period shows that political benefits were sought intentionally and were not just a reflection of her religious piety.

Blanche's abundant patronage was a spiritual necessity in the religious landscape of Champagne, and many interpreted her support as an example of piety, a virtue particularly expected of women. This connection between female patronage and piety was not confined to the boundaries of medieval Champagne, for a distinct feminine piety similarly appeared in other female rulers like Countess Jeanne of Flanders and Hainaut. Jeanne, a contemporary of Blanche, acquired sudden political control of her counties when King Philip Augustus imprisoned her husband after the Battle of Bouvines in 1214. Though Jeanne was countess for over forty years, her period of governance during her husband's imprisonment from 1214 to 1226 is easiest to compare with Blanche's regency. As historian Erin L. Jordan writes, "In many ways, Jeanne's position during Ferrand's incarceration was similar to that of a widow, freed by the absence of a husband to act autonomously."<sup>16</sup> In his absence, Jeanne frequently engaged in religious patronage, donating most of her financial resources to spiritual communities. According to thirteenth-century chronicler Philippe Mouskes, her propensity to support these institutions ultimately forced her husband "to rescind many of the donations made by his imprudent and overly pious wife" upon his return.<sup>17</sup> Mouskes's portrayal paints Jeanne as a pious but ineffectual figure.<sup>18</sup> Such assessments misrepresent the impact of conspicuous generosity to ecclesiastical communities, as well as underestimate the ability of female rulers to recognize and make use of patronage's political power. Aristocratic women in the thirteenth century patronized monasteries to support legitimate political strategies, and Blanche was no exception.<sup>19</sup> Over the course of her regency, Blanche of Navarre engaged in some legal capacity with seventy-eight unique monasteries of all major orders in and around Champagne with both male and female members.

Religious patronage to monasteries was one avenue for Blanche to exercise her religiosity and political strategy, and Blanche created a habit of donating to these institutions. She received favorable attention early in her regency from two monasteries that



had not previously appeared in her charters—an indication that the abbeys of France took notice of Blanche's charity not contained in legal proceedings. The abbess of Ligueux, a Benedictine convent in Dordogne, allowed Blanche to enjoy the same spiritual benefits the abbey afforded to its members and established a mass and prayers for her family.<sup>20</sup> Suggestive of a favorable religious perception of Blanche beyond Champagne, the monastery of Cluny in the diocese of Autun joined Ligueux in granting Blanche religious privileges in 1205.<sup>21</sup> The prior of Cluny issued a similar charter "in recognition of Countess Blanche's devotion," including "prayers before and after her death and the inscription of her name in the mortuary roll that is circulated among Cluniac monasteries" as specific benefits.<sup>22</sup> Though such charters lacked any explicit impetus, Blanche of Navarre established a pattern of ingratiating herself with monastic communities.

Closer to home, the growing percentage of monasteries in Champagne that belonged to the Cistercian order meant her frequent patronage of the order was inevitable, even if Blanche's charters did not indicate a favoritism towards them. The Cistercians had breathed new life into monasticism in the thirteenth century, surpassing other orders both in the number of new abbeys opened and in the share of total patronage.<sup>23</sup> Blanche patronized several of these monasteries around Champagne, including the abbeys of Quincy, Longpont, Clairvaux, and the original house of the Cistercian order, Cîteaux. Patronizing Quincy in 1206 and 1215, she first donated one hundred acres of woods for the repose of Thibaut III's soul and later gave the abbey property at Bar-sur-Aube.<sup>24</sup> To the monks of Longpont, Blanche agreed to warrant the 1300 *livres* owed by Jean, lord of Montmirail and Oisy, in 1209 and donated a house at Oulchy in 1219.<sup>25</sup> To Clairvaux, she gave a house at Morin in 1208.<sup>26</sup> To the original Cistercian monastery, Blanche gave a rent of thirty *livres* to feed the monks in 1216.<sup>27</sup> These actions demonstrated Blanche's dedication to patronage with a variety of deliberate monetary and physical gifts. Moreover, these actions fostered relationships that would yield future benefits to her. Mirroring the sentiment of the declarations given by Ligueux and Cluny earlier, Cîteaux promised in 1216 that, "as soon as her death is announced to the general chapter, [the Cistercians] will do for her what they would for a member of the order."<sup>28</sup> Years of thoughtful patronage from Blanche to the Cistercian order undoubtedly inspired Cîteaux's eventual celebration of her piety.

Blanche was so connected to the Cistercian order that she founded and endowed the Cistercian convent of Argensolles in what became her most notable act of monastic patronage.<sup>29</sup> Her decision to found the abbey accompanied her retirement from public life in 1222. The charters relating to Argensolles, from August 1221 through early 1225, coincide with the very end of her regency after she had formally abdicated to Thibaut IV. After founding the convent for “the protection of her soul and that of her son Thibaut...as well as in memory of her husband and all of his predecessors,” Blanche retired to Argensolles, her son having succeeded her as ruler of Champagne.<sup>30</sup> In 1224, under Blanche’s direction, the Cistercian order incorporated the chapter in the presence of the abbots of Cîteaux and Clairvaux.<sup>31</sup> The endowment of the abbey marked the last major act of monastic patronage during her regency and thus the final public sign of her pious conduct as countess. Blanche of Navarre’s abundant patronage to the monasteries described above solidified her image as a holy woman and produced a vast network of religious allies that would undoubtedly be politically beneficial, an important factor that will be discussed in detail later in this analysis.

Such large-scale monastic patronage was not limited to female regents with smaller dominions of authority like Blanche of Navarre. In the cases of women with greater dominion, like Blanche of Castile, Queen regent of France (r. 1226–1234 and 1248–1252) and cousin of Blanche of Navarre, such patronage proved to be a vital part of effective rulership. As a member of the Capetian dynasty, Blanche of Castile was responsible for positioning her family as the rulers chosen by God.<sup>32</sup> In 1227, while acting as regent for her not-yet-of-age son Louis IX, Blanche of Castile founded a Cistercian monastery named Royaumont for the soul of her late husband, King Louis VIII.<sup>33</sup> While her religious patronage demonstrated her piety, her benefactions had direct political implications because of their contribution to her pious reputation. This reputation garnered respect from the larger religiously centered political world. Beyond strengthening the religious image of Blanche’s family, which was implicit in such an act of largesse, the abbey’s location supported the borders of their new land in Normandy.<sup>34</sup> According to historian Constance Hoffman Berman, its foundation was ultimately a “great political success, reinforcing the power and authority of the crown early in the regency.”<sup>35</sup> Blanche of Navarre did not have the financial resources or widespread authority of a queen, but her religious

patronage and foundation of an abbey were indeed consistent with the patterns of another ruling woman at the time. The two women's challenges and political objectives differed, yet both women implemented patronage that would prove beneficial in secular affairs.

While Blanche of Navarre and Blanche of Castile engaged in patronage to monasteries, this was not the only path for a female leader to demonstrate commitment to her community. Though charity to monasteries was important, hospitals in the thirteenth century were thought to be even worthier recipients of patronage, particularly capable of performing "the seven corporal works of mercy."<sup>36</sup> In a medieval context, the hospital was not only a medical institution but also a religious establishment, a shelter, and a hostel.<sup>37</sup> Hospitals appear under three categories in Blanche of Navarre's charters: the *hôtel-Dieu*, the hospital, and the leprosarium. While all forms of her patronage served spiritual purposes, Blanche's charity towards hospitals especially established her pronounced reputation for largesse.

Blanche's interactions with hospitals in her early years as regent suggested that she hoped to build a loyal and reciprocal relationship with her local community. This relationship remained secure largely because of Blanche's repeated attention to the *hôtel-Dieu-le-Comte*, which began when she resolved a dispute involving the hospital in 1202.<sup>38</sup> Even long after its founding, the *hôtel-Dieu*, a term for a hospital for the poor and needy run by the Church, "received a wide range of privileges and exemptions from the counts, and it also enjoyed papal protection, beginning with Pope Celestine III in 1197."<sup>39</sup> As a countess, Blanche exercised her authority to intervene in the administrative affairs of the county's hospitals, ensuring the success and stability of each. For example, Blanche founded a mass at the hospital in honor of the late Clarembaud of Chappes in 1209 and contributed financially to the salary of the priest.<sup>40</sup> Blanche also granted certain political benefits to hospitals, such as when she alleviated the *hôtel-Dieu-le-Comte* from the tax on its tenement in Payns in 1212.<sup>41</sup>

Mirroring her endowment of Argensoles, Blanche founded her own hospital to truly demonstrate her commitment to the religious citizens of Champagne. The establishment of the hospital of La Barre began in 1212. In March of that year, Blanche and Gui de la Barre, chaplain of Saint-Thibaut in Chateau-Thierry, intended to establish the hospital for the service of the poor on Gui's lands.<sup>42</sup> Blanche renounced all of her rights to Gui's donated property at

that time; in September of the next year, she placed the hospital under her protection and built a small chapel on the grounds.<sup>43</sup> By July 1214, the lack of charity given to her newly-founded hospital frustrated Blanche, and she appealed to her subjects to do their part to protect the poor and sick within the hospital.<sup>44</sup>

Blanche's charity held significant prominence in Champenois society given her degree of authority and her identity as a woman. In her own discussion of medieval philanthropy, Anne Lester posits that "care for the sick at the local level was a defining aspect of paternalism inherent in aristocratic identity," attributing physical aristocratic charity to a lordly duty rather than any particular merciful inclination.<sup>45</sup> Though Blanche's personal motivations to donate cannot be precisely interpreted, the public implications of her charity are substantially more important from a historical perspective. Those implications were heavily dependent on the fact that Blanche was a woman. Women were religiously associated with bodily suffering and particularly suited to the physical labor of charity.<sup>46</sup> Blanche of Navarre's charity was only evident in legal documents, making it difficult to determine whether she engaged in the personal service described by Lester. However, given the ample documentation of Blanche's patronage, administration, and foundation of hospitals—along with historical evidence of other high-status women who engaged in this type of charity—physical penance did not seem to be beyond her capacity. Engaging in this type of charity further informed Blanche's reputation as a spiritually strong female leader.

While monasteries and hospitals made up the majority of Blanche's conventional charity, her patronage also encompassed the secular clergy. The secular clergy refers to a category of non-monastic organizations including collegiate churches, bishops, and cathedrals in Champagne and the surrounding counties. Blanche, certainly cognizant of the war brewing in October 1209, founded a mass at Saint-Etienne of Troyes, a local collegiate church, "in consideration of the late queen of France Adele's friendship and affection for her."<sup>47</sup> Blanche's charters with Saint-Etienne of Troyes outnumbered those of other collegiate churches. The founder, Count Henry I of Champagne (r. 1127–1181), intended it to be a "dynastic sanctuary."<sup>48</sup> Hoping to establish her family's ongoing connection with the collegiate church, Blanche commissioned "an elaborate tomb for her husband that she had placed in the center of Saint-Etienne of Troyes."<sup>49</sup> Beyond Troyes, Blanche's charters

show that she involved herself in the affairs of secular clergy, particularly during the first decade of her regency.

Blanche was dually intertwined in the secular chapters, both patronizing them in the traditional sense and attending to administrative matters. In May of 1203, she gave revenues to be "used in perpetuity for the light of the church" to Saint-Nicolas of Sezanne for the protection of Thibaut III's soul.<sup>50</sup> Between donations, Blanche managed the secular clergy as regent countess. In an agreement with the dean of Notre-Dame of Bray, Blanche and her successors reserved the right to name the treasurer and cantor of the chapter.<sup>51</sup> Her involvement with collegiate churches diminished between 1210 and 1215, yet her patronage resumed in 1215. She all the while maintained engagement with senior members of the secular clergy.

The cartulary evidence recording Blanche's dealings with Church officials emphasized the complex political relationships characteristic of the Champenois political landscape so dominated by ecclesiastical authorities. Blanche's disputes with the bishops of the county shaped her political standing as much, if not more so, than the spiritual connections she forged through patronage. In 1211, Blanche chose to free William of Joinville, bishop of Langres, from a significant debt.<sup>52</sup> But the bishop initiated a dispute with Blanche to reclaim feudal dependency over Chaumont in 1213.<sup>53</sup> Four years later, their relationship appeared to improve, as the bishop associated "his faithful Blanche" in lordship over the village of Montigny.<sup>54</sup> Blanche's limited legal dealings with the religious authorities of Soissons similarly illustrated the distinct capacities in which the countess dealt with secular clergy. In 1220, an accusation that one of the Jews living in Blanche's county had struck a cleric forced Blanche to reach a resolution with the bishop of Soissons. Despite this unpleasant case, another charter showed the provost and dean of Soissons expressing gratitude towards Blanche. The clergy of Soissons "thank[ed] lady Blanche, countess of Troyes, for her generous benefactions," intending to celebrate an anniversary mass for her and Thibaut III.<sup>55</sup> These various political dealings demonstrate Blanche's ability to negotiate and communicate as a political equal.

Several contemporary figures of Blanche have already been highlighted to illustrate the role of female leadership in medieval France throughout this overarching discussion of Blanche's patronage. Adela of Blois offers a final comparison. The daughter of William the Conqueror, Adela was born in mid-eleventh-

century Normandy. She engaged in similar relationships with the French secular clergy a century before Blanche of Navarre. Acting as regent of Blois while her husband was away on the First Crusade and later during her son's minority, contemporaries "praised Adela's proficient exercise of full comital authority" during the duration of her rule.<sup>56</sup> She maintained a significant relationship with Bishop Ivo of Chartres, and their mutual cooperation supported Adela's regency. In return for her generous backing during his early years as bishop, Ivo cooperated with Adela during peace legislation, which critically reinforced Adela's authority as regent countess.<sup>57</sup> Documentation of their relationship, as historian Kimberly LoPrete describes, indicates that "Ivo was both willing and able to tap his legal acumen while using his position in the church hierarchy to promote Adela's political agenda at critical junctures."<sup>58</sup> The generosity Adela displayed to the secular clergy fostered a loyal relationship in which bishops went out of their way to politically assist the countess. For Blanche of Navarre, her negotiations with bishops and widespread patronage of various religious institutions similarly cultivated a mutually beneficial environment. This environment would prove powerful for her given the turbulent political circumstances she faced throughout her reign.

### **Perceptions and Consequences of Patronage in the War of Succession**

In his *Histoire des ducs et des comtes de Champagne*, Arbois de Jubainville documented the numerous ways Blanche asked King Philip Augustus for support during her regency: monetary payment, control of land, and, most interestingly, a gift of two hundred cheeses.<sup>59</sup> Blanche's creative donation of cheese did not radically change the course of the War of Succession, but her impassioned and frequent appeals to Philip Augustus kept her close to the king's mind. Jubainville noted that the king responded to Blanche's gift only by providing her with a weak army, concluding that "the support of Philip Augustus was above all moral, and the moral support of kings was much less powerful than that of the papacy."<sup>60</sup> While Blanche gifted neither Pope Innocent III nor Honorius III cheese, their moral support for Blanche's cause never abated—undoubtedly a product of her conspicuous faith.

Despite few direct interactions between Pope Innocent III and Blanche of Navarre during the first decade of her regency, the

positive reputation Blanche built through her patronage resonated throughout the ranks of the Church. Affirming the Church's active acknowledgment of patronage, Innocent III's treatise on charity emphasized his appreciation of prudent and thoughtful almsgiving. In the treatise, Pope Innocent III emphasized that almsgiving should be joyful and considerate, going first to the worthiest recipients.<sup>61</sup> Of all of her charitable works, the Church would have particularly recognized Blanche's participation in the hospital reform movement. As Anne Lester writes, "Through caregiving and begging alms religious women became linked physically and spiritually to God's chosen people: the poor and the leprous."<sup>62</sup>

As an aristocratic woman committed to her faith, Blanche used her considerable authority to give charity to hospitals and endow her own. This commitment to faith and largesse benefited her when the pope became involved in political matters. In medieval France, which was composed almost entirely of faithful and fearful Christians, the pope held massive political power. His threat of excommunication or papal interdict could often decide the outcome of a war, so his support for Blanche over her adversaries was critical. Between 1201 and 1213, the papacy's open admiration of Blanche had grown, not because of any extensive appeals from Blanche to the pope himself, but through a widespread recognition of Blanche's patronage and, by extension, piety.

During a papal inquest in October 1213, Robert Courson, the papal legate, wrote a memo to religious authorities advocating for Blanche, illustrating the connective power between Blanche and the papacy:

One of the duties of our charge is to take the defense of orphans and widows, because the Apostolic See envelops them in a special protection. Blanche, countess of Troyes, our dear daughter in Jesus Christ, is not content to follow in the footsteps for her predecessors but exceeds them in devotion and respect for the papacy. So, we want to provide for her peace and tranquility with a paternal concern.<sup>63</sup>

Courson's memo clearly emphasized Blanche's femininity as it related to her acts of mercy. Blanche's positive relationship with the pope depended upon her image as an incredibly pious *woman*. Beyond patronage, Amy Livingstone suggests that "nobelwomen were frequently called upon to act as mediators between the



clergy and their male kin.”<sup>64</sup> This idea supports Anne Lester’s earlier contention that women were viewed as more naturally connected to religious charity and the monastic life. The crusade movement heightened this gendered perception of religious life, as men demonstrated their religious devotion through crusading rather than through charity at home. Lester describes the family dynamic during this time, writing, “For those who remained at home—primarily women—prayer, processions, crusader liturgies, and works of mercy characterized a piety of penance.”<sup>65</sup> The public perception that women were uniquely suited to religious patronage did not necessarily imply major effects on female agency. However, for Blanche, a countess with massive secular responsibility and a brewing crisis, her perception by the public and influential papal authorities mattered a great deal. The Church’s view of Blanche as a model of the pious widow had the potential to directly alter her political success. As such, her authority was undeniably gendered.

Blanche’s charity to hospitals encouraged the papacy to form a positive opinion of her while her direct patronage to monasteries and members of the secular clergy motivated those institutions to politically ally with her. The acknowledgment and expectation of secular benefits from religious patronage extended through the ecclesiastical hierarchy. In Pope Innocent III’s treatise, he articulated the three main reasons to give alms: the capacity for receiving grace, the reduction of eternal punishment, and the obtainment of temporal wealth.<sup>66</sup> The pope recognized the material benefits of almsgiving without denouncing them as sinful, allowing Blanche to reap the substantial political benefits of charity without compromising her relationship with the Church. The potential for secular gain was particularly meaningful to Blanche because of the insecurity of her son’s succession.

The combined force of Blanche’s patronage to monasteries, hospitals, and the secular clergy cultivated a personal network of ecclesiastical support at a time when the Church held nearly insurmountable political power. This network was invaluable as the dispute of succession in Champagne dangerously festered. In 1213, the issue of Thibaut IV’s succession escalated to a full-scale crisis. Philippa, the younger daughter of the previous count of Champagne, planned to marry Erard of Brienne, who was well aware of the prime position he would obtain with their marriage.<sup>67</sup> Fearing any challenges to the throne that a union might produce, Blanche requested two papal inquests to prevent their marriage. The initial inquest sought to determine if the marriage would



violate the Church's law on consanguinity.<sup>68</sup> Roland, abbot of Montiéramey, Olivier, abbot of Quincy, and Gautier, abbot of Vauluisant—all recipients of Blanche's patronage—made the first decision on this inquest in 1213. The three abbots decided in favor of Blanche, confirming that there was "kinship to a prohibited degree between Erard of Brienne and Philippa."<sup>69</sup> Robert Courson, the papal legate who so praised Blanche's protection of orphans and widows, oversaw the inquest and equivalently concluded that the marriage could not proceed due to Erard and Philippa's familial relation.<sup>70</sup> Consequently, Pope Innocent III ordered the patriarch of Jerusalem and archbishop of Tyre to prevent Erard and Philippa from marrying under threat of excommunication.<sup>71</sup>

The second inquest Blanche requested challenged Philippa's legitimacy by questioning the validity of her parents' marriage. In processing this inquest, the papal legate once again sided with Blanche in October 1213. Producing the previously mentioned effusive memo about Blanche's faith, Courson recommended the excommunication of any who troubled Blanche and her son.<sup>72</sup> With the evidence of Courson's conclusion and the supplementary testimonies collected by the bishop of Soissons, the pope ultimately decided in favor of Blanche in December.<sup>73</sup> These inquests firmly endorsed Blanche of Navarre's familial right to Champagne and blocked Erard from any papal support, thereby solidifying Blanche's strong legal position at the outset of the War of Succession.

The papacy's decisions emphasized the loyalty of ecclesiastical authorities to Blanche. While Blanche certainly knew that Philippa and Erard could be legitimate adversaries, the Church indicated its commitment to defending the pious countess from such dogged opponents. The abbots of Montiéramey, Quincy, and Vauluisant, as well as the bishop of Soissons, had dealt directly with Blanche and saw firsthand her capacity for charity; Courson and Innocent III recognized her piety from her patronage. It is important to remember that the Church's support of Blanche was not a foregone conclusion when she became regent with her unborn son in 1201. Blanche earned this support and intentionally cultivated meaningful political relationships through her charity and piety. Her remarkable patronage in the years leading up to 1213 brought her the assurance that the highest ecclesiastical authorities defended her cause.

As crucial as papal support was, it did not immediately resolve the conflict over the political future of Champagne. Erard and

Philippa continued to challenge Blanche despite her early legal victories, reinforcing the necessity of the countess's religious alliances. The two married against papal directive in 1215, and Erard carried on his mission to claim the county from Blanche. He amassed allies in the years that followed, including some of Blanche's own vassals. Several of those vassals subsequently renounced their homages to the countess.<sup>74</sup> Blanche nonetheless sought further political support as Erard's aggression mounted. Before this escalation, after Thibaut IV had spent four years in Philip Augustus's custody, Blanche took advantage of the king's positive temperament in 1214 and convinced him to accept Thibaut's homage for Champagne several years ahead of schedule.<sup>75</sup> With Blanche once again preempting legal challenge to her son, Erard needed to rely on his allies in the region even more. They began to plan for war.

Elsewhere, Erard continued to be denied. Philip Augustus rejected Erard and Philippa's request to circumvent Thibaut IV's homage in 1216. Prompted by Erard's attacks on Blanche and her son, Pope Innocent III added insult to injury and repeated his orders of excommunication for Erard and Philippa to several major abbots and bishops around Champagne.<sup>76</sup> Innocent III, hoping to thoroughly investigate the matter, assigned the bishop of Soissons and the abbots of Cluny and Longpont to hear the testimony of Erard and Philippa regarding the legitimacy of Philippa's claim to Champagne.<sup>77</sup> With the matter still unresolved when Honorius III replaced Innocent as pope, Honorius III renewed the order in November 1216.<sup>78</sup> Neither Erard nor Philippa responded to the summons, so the two abbots and the bishop were forced to inform the pope of their absence.<sup>79</sup> While no judgment was made, Blanche's previous charity towards all three parties likely would have resulted in another favorable decision had the opportunity arisen. Arbois de Jubainville made the direct connection between Blanche's generosity towards Cluny and Longpont and their defense of her. In reference to her past patronage to the two abbeys, he wrote, "And yet we can believe that Blanche had spared nothing to stimulate their zeal."<sup>80</sup> But the papacy's support did not ensure that all religious figures allied with Blanche or obeyed the pope's orders. Some had their own outstanding conflicts with the countess.

While Blanche's patronage certainly won her many allies, not every ecclesiastical authority was inclined to side with her purely because of her patronage. Simon and William of Joinville,

cousins of Erard of Brienne, were examples of such dissenters. Simon was seneschal of Champagne under Blanche, and William was the bishop of Langres who appeared in Blanche's charters. Not entirely satisfied with Blanche's authority, the two brothers had settled a separate minor political conflict with Blanche in 1214 but continued to politically challenge her in the context of Erard's claim to succession. Simon later joined Erard's faction, and William, as bishop, repeatedly disregarded Pope Honorius III's order of excommunication for Erard and Philippa.<sup>81</sup> William was not alone. For various reasons, the bishops of Auxerre and Troyes also resisted Erard's excommunication.<sup>82</sup> Still, despite Erard's substantial allyship within the Champenois religious community, his allies could not prevail against the vast base of ecclesiastical support behind Blanche.

Erard and Blanche fought through Champagne from 1216 to 1218. While Erard's rambunctious band of allies ravaged the countryside, his continued excommunications gradually chipped away at his resolve. The abbot of Longpont, along with the archbishop of Reims and bishop of Senlis, excommunicated Erard in April 1217 and forced him to sign treaties later that year.<sup>83</sup> Pope Honorius III extended the excommunications to several of Erard's allies, including William of Joinville. The military conflict was finally resolved in 1218.<sup>84</sup>

Although the conflict seemed to be a collision of Erard's military efforts and Blanche's religious defense, the countess's path to victory required a substantial military force, an aspect of rulership not expected of women. While this paper has placed significant emphasis on Blanche's wielding of feminine power, her military force was anything but typically feminine. Blanche's effective political use of patronage enhanced rather than replaced the qualities expected of a successful leader, regardless of gender. Theodore Evergates argues that "the prospect of a lengthy regency by a foreign-born woman...must have unsettled some barons in 1201."<sup>85</sup> But Blanche left no doubt of her worthiness as Champagne's ruler when she defied expectations for female countesses through two years of impressive military leadership.

Blanche indeed stands out in her military might among other figures of her time. The regency of Jeanne of Flanders and Hainaut, as previously discussed, resembled Blanche's reign in many respects. Jeanne's case suggests that patronage might have been a tool particularly helpful to female rulers who lacked military skill. During a rebellion of her subjects, Jeanne was "forced to flee

in fear and humiliation.”<sup>86</sup> Her military weakness inevitably became publicly associated with her gender and barred her from wholly successful leadership, even with the help of support garnered through her patronage. For many female leaders, patronage was a more viable source of political strength than military power. While Jeanne and Blanche both accessed authority in similar ways, Blanche’s military fortitude allowed her a greater degree of overall power and success.<sup>87</sup> In this, Blanche trounced not only her enemies in the War of Succession, but gender expectations as well.

With Blanche’s political success as a ruler cemented, the peace negotiations that followed the war reduced Blanche’s need for ecclesiastical support. She retired contently in 1222, knowing her son’s authority was secure. Per Blanche’s request, Pope Honorius III lifted all past excommunications. The abbots of Cîteaux, Clairvaux, and Quincy—all members of the Cistercian order that enjoyed Blanche’s frequent attention—also participated in the negotiations.<sup>88</sup> At Molesme abbey in 1222, Erard and Philippa finally and formally surrendered their claim to Champagne.<sup>89</sup> In the end, Blanche’s political world was inextricably tied to the monks, nuns, bishops, and priests of her county, and, generally speaking, the clergy remained loyal to their generous countess. The Cistercian abbots of Clairvaux and Cîteaux were present at the incorporation of Blanche’s abbey, Argensolles, into the Cistercian order. This event signaled the effective conclusion of Blanche’s political dependence on religious institutions and marked her entry into retirement at which time the genuine spiritual core of her patronage became indisputable.

## The Retirement of a Regent

Despite the secular benefits she reaped from her patronage, Blanche’s piety was never a façade. This paper has stressed that patronage was a political tool for Blanche. It is important, however, to consider that Blanche’s patronage was multi-layered, spiritual as well as strategic. When Thibaut IV succeeded her in May 1222, Blanche retired to Argensolles feeling more confident in her son’s position than at any other point in the previous two decades.<sup>90</sup> Her son would face his own political struggles, but Blanche had fulfilled her responsibility. With her own conflicts behind her, Blanche’s religious patronage now only needed to serve its pure, spiritual purpose. While her patronage was necessarily public, Blanche also practiced her faith in private moments.

During her regency, she wrote to Adam, abbot of Perseigne, requesting copies of his sermons for her personal enjoyment and prayer.<sup>91</sup> Her actions as countess were not those of an irreligious and opportunistic politician, but of a leader with natural religious inclinations and the wisdom to successfully defend her comital authority.

Confirming the strong faith she had practiced throughout her life, Blanche continued her abundant patronage even when it had little political relevance. According to Arbois de Jubainville, donations from Blanche appeared in her son's charters twenty-four times from 1222 to 1229. Many of the charters document her ongoing endowment of Argensolles, but she also continued to patronize many of the abbeys that she had during her regency, including Clairvaux, Saint-Denis, and Champbenoit.<sup>92</sup> Little information exists describing Blanche's life at Argensolles until her death in 1229. Even so, brief glimpses from monastery records reveal a commanding and ambitious countess who even in retirement could not shed her identity as a leader. Blanche carried her political alliances into her retired life, using her friendship with the Cistercians to bring ninety more women into the abbey.<sup>93</sup> The countess's patronage enabled her future generosity. Blanche's contemporaries had no reason to doubt the religious authenticity of her patronage. As Theodore Evergates notes, Blanche was known to the people of Champagne as a woman with a "strong religious temperament."<sup>94</sup> Her personal correspondence with religious clergy indeed supports this perspective.

Although a portion of Blanche's life at Argensolles remains a mystery, her cartulary provides the ample historical evidence of Blanche's regency that historians now have. Theodore Evergates describes the source as "unique among medieval cartularies in being drawn up as a personal, commemorative volume," for it was delivered in its complete form to Blanche at Argensolles in 1225.<sup>95</sup> Blanche's own diligent preservation and documentation efforts throughout her regency culminated in this memorial of her incredible success. In her last years of life, Blanche could examine the cartulary and reflect on her bumpy yet constant path to victory with a sense of satisfaction.

Blanche of Navarre intentionally used religious patronage to foster alliances which proved time and again essential to her total victory over a legitimate challenger. The countess's patronage to monasteries created a vital support network in her county during moments of legal conflict. Her patronage to hospitals convinced

the papacy of her piety and garnered the pope's respect. Finally, her patronage to secular clergy firmly cemented her coexisting spiritual and political fortitude. The regencies of Jeanne of Flanders and Hainaut, Blanche of Castile, and Adela of Blois show that religious patronage remained a powerful and accessible tool for thirteenth-century aristocratic women. Incorporating this powerful patronage among her other impressive qualities, Blanche of Navarre embodied the ideal medieval ruler—male or female. She demonstrated that gender was neither an absolute obstacle to success nor a primary cause of failure. The person, and that person's decisions and relationships, mattered too.

1. Goswin of Bossut, *Send Me God: The Lives of Ida the Compassionate of Nivelles, Nun of La Ramée, Arnulf, Lay Brother of Villers, and Abundus, Monk of Villers*, trans. Martinus Cawley (Turnhout, Belg: Brepols, 2003), p. 173.
2. Goswin of Bossut, *Send Me God*, p. 172.
3. Goswin of Bossut, *Send Me God*, p. 174.
4. For a full account on the foundation of Argensolles over the years of 1221–1222, as well as description of its future operations, see A. Kwanten, “L’Abbaye Notre-Dame d’Argensolles,” *Mémoires de la Société d’agriculture, commerce, sciences et arts du département de la Marne* 84 (1969): 75–76.
5. Theodore Evergates, *The Aristocracy in the County of Champagne, 1100–1300* (Philadelphia: University of Pennsylvania Press, 2007), p. 156.
6. Theodore Evergates, “Countess Blanche, Philip Augustus, and the War of Succession in Champagne, 1201–1222,” in *Political Ritual and Practice in Capetian France: Essays in Honour of Elizabeth A.R. Brown*, ed. Marienne Cecilia Gaposchkin and Jay Rubenstein (Turnhout: Brepols, forthcoming), p. 3.
7. Evergates, *The Aristocracy*, p. 156.
8. Evergates, “Countess Blanche,” p. 2.
9. Evergates, “Countess Blanche,” p. 2.
10. Evergates, “Countess Blanche,” pp. 8–9.
11. Evergates, “Countess Blanche,” p. 20.
12. Henri Arbois de Jubainville compiled and translated hundreds of charters from the period of Blanche’s regency in volume V (published in 1863) of his series, *Histoire des ducs et des comtes de Champagne*. The charters from volume V appear as numbered documents in the source. Jubainville then wrote a long summary of Blanche’s life and regency in volume IV of the same series, which was published in 1865. Henri d’Arbois de Jubainville, *Histoire des ducs et des comtes de Champagne*, 6 vols. (Paris: A. Durand, 1859–1866).
13. For Blanche’s role in the War of Succession, see Evergates, “Countess Blanche,” pp. 1–38; Arbois de Jubainville, *Histoire*, vol. IV, pp. 101–97; Katrin E. Sjursen, “Weathering Thirteenth-Century Warfare: The Case of Blanche Navarre,” *The Haskins Society Journal* 25 (2013): 205–22. For alternative perspectives on the war, see Sara McDougall, “Scandal in Jerusalem: Royal Succession and Illegitimacy,” in *Royal Bastards: The Birth of Illegitimacy, 800–1230* (Oxford: Oxford University Press, 2017), pp. 236–53; Bernard Hamilton, “Queen Alice of Cyprus,” in *The Crusader World*, ed. Adrian J. Boas (London: Routledge, 2016), pp. 225–40.
14. I particularly focus my comparisons on Jeanne of Hainaut and Flanders, Adela of Blois, and Blanche of Castile. For a description of Jeanne’s regency, see Erin L. Jordan, *Women, Power, and Religious Patronage in the Middle Ages* (New York: Palgrave MacMillan, 2006). On Adela of Blois, see Kimberly A. LoPrete, *Adela of Blois: Countess and Lord (c. 1067–1137)* (Dublin: Four Courts Press, 2007). On Blanche of Castile,

see Sean L. Field, *Courting Sanctity: Holy Women and the Capetians* (Ithaca: Cornell University Press, 2019); Constance Hoffman Berman, "Two Medieval Women's Property and Religious Benefactions in France: Eleanor of Vermandois and Blanche of Castile," *Viator* 41, no. 2 (2010): 151–82; Constance Hoffman Berman, *The White Nuns: Cistercian Abbeys for Women in Medieval France* (Philadelphia: University of Pennsylvania Press, 2018).

15. Theodore Evergates, trans. and ed., *Feudal Society in Medieval France* (Philadelphia: University of Pennsylvania Press, 1993), p. xx.

16. Erin L. Jordan, "Exploring the Limits of Female Largesse: The Power of Female Patrons in Thirteenth-Century Flanders and Hainaut," in *Women and Wealth in Late Medieval Europe*, ed. Theresa Earenfight (New York: Palgrave MacMillan, 2010), p. 149.

17. Jordan, "Exploring the Limits," p. 160.

18. Jordan, "Exploring the Limits," p. 149.

19. In this article, I focus on the works of Erin L. Jordan and Kimberly LoPrete. For reference, see Jordan, "Exploring the Limits," pp. 149–69; Jordan, *Women, Power, and Religious Patronage in the Middle Ages*; Kimberly LoPrete, "The Gender of Lordly Women: The Case of Adela of Blois," in *Studies on Medieval and Early Modern Women: Pawns or Players?*, ed.

Christine Meek and Catherine Lawless (Dublin: Four Courts Press, 2003), pp. 90–110. For an example outside of the region, see Helen A. Gaudette, "The Spending Power of a Crusader Queen: Melisende of Jerusalem," in *Women and Wealth in Late Medieval Europe*, ed. Theresa Earenfight (New York: Palgrave MacMillan, 2010), pp. 135–48.

20. Arbois de Jubainville, *Histoire*, vol. V, p. 28, no. 562.

21. Theodore Evergates, ed., *Littere Baronum: The Earliest Cartulary of the Counts of Champagne* (Toronto: University of Toronto Press, 2003), pp. 96–97, no. 57.

22. Evergates, ed., *Littere Baronum*, pp. 96–97, no. 57.

23. Erin L. Jordan, "Gender Concerns: Monks, Nuns, and Patronage of the Cistercian Order in Thirteenth-Century Flanders and Hainaut," *Speculum* 87, no. 1 (2012): 62.

24. Arbois de Jubainville, *Histoire*, vol. V, p. 44, no. 652; Theodore Evergates, ed., *The Cartulary of Blanche of Champagne* (Toronto: University of Toronto Press, 2010), p. 346, no. 392.

25. Evergates, ed., *Littere Baronum*, p. 91, no. 51; Evergates, ed., *The Cartulary of Blanche*, p. 94, no. 70.

26. Evergates, ed., *The Cartulary of Blanche*, p. 277, no. 309.

27. Arbois de Jubainville, *Histoire*, vol. V, pp. 99–100, no. 973.

28. The original French text, as quoted in the paper: "A[rnaud], abbé de Cîteaux, promet a Bl. que, lorsque sa mort sera annoncée au chapitre général, on fera pour elle ce qu'on ferait pour un membre de l'ordre." Arbois de Jubainville, *Histoire*, vol. V, p. 100, no. 974. The translation provided is my own, and all subsequent translations will be so as well. All featured quotes in this article will be accompanied by the original French



text via a corresponding note.

29. Goswin of Bossut, *Send Me God*, p. 174.

30. Original French text: "Ayant fondé cette abbaye 'pour le salut de son âme et celle de son fils Thibaut, comte palatin de Champagne et de Brie, ainsi qu'en souvenir de son époux et de tous ses prédécesseurs.'" Kwanten, "L'Abbaye Notre Dame d'Argensolles," 77.

31. Kwanten, "L'Abbaye Notre Dame d'Argensolles," 76; Anne E. Lester, *Creating Cistercian Nuns: The Women's Religious Movement and Its Reform in Thirteenth-Century Champagne* (Ithaca: Cornell University Press, 2011), p. 32.

32. Field, *Courting Sanctity*, p. 5.

33. Berman, "Two Medieval Women's Property," 170.

34. Berman, "Two Medieval Women's Property," 170.

35. Berman, *White Nuns*, p. 111.

36. Adam J. Davis, *The Medieval Economy of Salvation: Charity, Commerce, and the Rise of the Hospital* (Ithaca: Cornell University Press, 2019), p. 18.

37. Davis, *Medieval Economy of Salvation*, pp. 3–4.

38. Arbois de Jubainville, *Histoire*, vol. V, p. 29, no. 564.

39. Davis, *Medieval Economy of Salvation*, p. 93.

40. Arbois de Jubainville, *Histoire*, vol. V, p. 54, no. 714.

41. Arbois de Jubainville, *Histoire*, vol. V, p. 62, no. 759.

42. Poquet's collection of translated charters from the Abbey of La Barre appeared in the journal, *Annales de la Société Historique et Archéologique de Château-Thierry*. Alexandre-Eusebe Poquet, "L'Abbaye de La Barre et Son Recueil de Chartres," *Annales de la Société Historique et Archéologique de Château-Thierry* (1884): 132, no. I.

43. Poquet, "L'Abbaye de La Barre," 132, no. I; Poquet, "L'Abbaye de La Barre," 135, no. V.

44. Poquet, "L'Abbaye de La Barre," 132, no. I; Poquet, "L'Abbaye de La Barre," 136–37, no. VI.

45. Lester, *Creating Cistercian Nuns*, p. 122.

46. Lester, *Creating Cistercian Nuns*, p. 143.

47. Original French text: "Bl, considérant la familiarité et l'affection qu'avait pour elle feue Adèle, reine de France, fonde pour cette princesse une messe quotidienne à Saint-Etienne de Troyes." Arbois de Jubainville, *Histoire*, vol. V, p. 54, no. 715.

48. Patrick Corbet, "Les collégiales comtales de Champagne (v.1150–v.1230)," *Annales de l'Est* 29 (1971): 199.

49. Theodore Evergates, ed., "Aristocratic Women in the County of Champagne," in *Aristocratic Women in Medieval France* (Philadelphia: University of Pennsylvania Press, 1999), p. 82.

50. Original French text: "Bl, pour le salut de l'âme de Th. III, consent à ce que les revenus de la première prébende vacante au chapitre de Saint-Nicolas de Sézanne soient à perpétuité employés au luminaire de l'église." Arbois de Jubainville, *Histoire*, vol. V, p. 32, no. 583.

51. Arbois de Jubainville, *Histoire*, vol. V, p. 30, no. 570.

52. Arbois de Jubainville, *Histoire*, vol. V, p. 63, no. 769.
53. Evergates, *The Aristocracy*, p. 235. Charters describing the dispute are found in Evergates, ed., *The Cartulary of Blanche*, pp. 103–4, 114, 204–5, nos. 83, 96, 215.
54. Evergates, ed., *The Cartulary of Blanche*, p. 384, no. 429.
55. Evergates, ed., *The Cartulary of Blanche*, p. 119, no. 102.
56. LoPrete, “Gender of Lordly Women,” p. 93.
57. Kimberly LoPrete, “Adela of Blois and Ivo of Chartres: Piety, Politics, and the Peace in the Diocese of Chartres,” in *Anglo-Norman Studies XIV*, ed. Marjorie Chibnall (Woodbridge: The Boydell Press, 1991), p. 141.
58. LoPrete, “Adela of Blois and Ivo of Chartres,” p. 152.
59. Arbois de Jubainville, *Histoire*, vol. IV, p. 140.
60. Original French text: “L’appui de Philippe-Auguste fut surtout moral, et l’appui moral des rois était alors bien moins puissant que celui de papauté.” Arbois de Jubainville, *Histoire*, vol. IV, pp. 140–41.
61. Davis, *Medieval Economy of Salvation*, pp. 41–43.
62. Lester, *Creating Cistercian Nuns*, p. 142.
63. Original French text: “Un des devoirs de notre charge, est de prendre la défense des orphelins et des veuves, car le siège apostolique les entoure d’une protection spéciale. Blanche, comtesse de Troyes, notre chère fille en Jésus-Christ, ne se contente pas de suivre les traces de ses prédécesseurs, mais elle les dépasse en dévouement et en respect pour la papauté. Aussi nous voulons pourvoir à sa paix et à sa tranquillité avec une sollicitude paternelle.” Arbois de Jubainville, *Histoire*, vol. IV, p. 141.
64. Amy Livingstone, *Out of Love for my Kin: Aristocratic Family Life in the Lands of the Loire, 1000–1200* (Ithaca: Cornell University Press, 2010), p. 67.
65. Lester, *Creating Cistercian Nuns*, p. 152.
66. Davis, *Medieval Economy of Salvation*, p. 69.
67. Erard of Brienne had seen John of Brienne, his cousin, marry Marie of Montferrat, queen of Jerusalem. Through the union, John of Brienne had become King of Jerusalem. Evergates, “Countess Blanche,” pp. 8–9.
68. Consanguinity refers to the degree of kinship between two people. More specifically, the degree at which it becomes unacceptable for two people to marry.
69. Arbois de Jubainville, *Histoire*, vol. V, p. 73, no. 824. For detail on their genealogy, including relative King Louis VI, see Arbois de Jubainville, *Histoire*, vol. IV, p. 114.
70. Arbois de Jubainville, *Histoire*, vol. V, p. 74, no. 827.
71. Arbois de Jubainville, *Histoire*, vol. V, pp. 76–77, nos. 839–42. Also see Evergates, “Countess Blanche,” p. 11.
72. Arbois de Jubainville, *Histoire*, vol. V, p. 75, nos. 832–33.
73. Evergates, “Countess Blanche,” p. 11; Arbois de Jubainville, *Histoire*, vol. V, p. 76, nos. 839–40.
74. For a full list of Erard’s allies, see Arbois de Jubainville, *Histoire*, vol. IV, pp. 128–32.
75. Since he had not reached age twenty-one, Thibaut IV remained in

Blanche's custody despite having given his homage to the king. Evergates, "Countess Blanche," p. 12.

76. Arbois de Jubainville, *Histoire*, vol. V, pp. 94–95, nos. 938–41.

77. Arbois de Jubainville, *Histoire*, vol. V, p. 98, no. 965.

78. Arbois de Jubainville, *Histoire*, vol. V, p. 108, no. 1027.

79. Evergates, "Countess Blanche," p. 17; Arbois de Jubainville, *Histoire*, vol. IV, p. 147.

80. Original French text: "Et pourtant on peut croire que Blanche n'avait rien épargné pour stimuler leur zèle." Arbois de Jubainville, *Histoire*, vol. IV, p. 147.

81. Evergates, *The Aristocracy*, pp. 235–36. On William's resistance to the pope's order, see Arbois de Jubainville, *Histoire*, vol. IV, p. 146.

82. Evergates, "Countess Blanche," p. 17.

83. Evergates, "Countess Blanche," p. 18.

84. Evergates, "Countess Blanche," pp. 18–19.

85. Evergates, *The Aristocracy*, p. 37.

86. Jordan, *Women, Power, and Religious Patronage*, p. 49.

87. Sjursen, "Weathering Thirteenth-Century Warfare," 221.

88. Arbois de Jubainville, *Histoire*, vol. V, p. 135, nos. 1172–73.

89. Evergates, "Countess Blanche," pp. 20–21.

90. Evergates, ed., *The Cartulary of Blanche*, p. 10.

91. "A Letter from Adam, abbot of Perseigne (after 1201)," in *Epistolae: Medieval Women's Latin Letters*, accessed December 15, 2020, <https://epistolae.ctl.columbia.edu/letter/749.html>.

92. Arbois de Jubainville, *Histoire*, vol. V, pp. 181–249.

93. Evergates, "Aristocratic Women," p. 84.

94. Evergates, "Aristocratic Women," p. 81.

95. Evergates, ed., *The Cartulary of Blanche*, p. 3.

# “Our Strength is in Loyalty”

Identity Formation Within America’s Colonial Army,  
the Philippine Scouts

*Hayden Kolowrat*

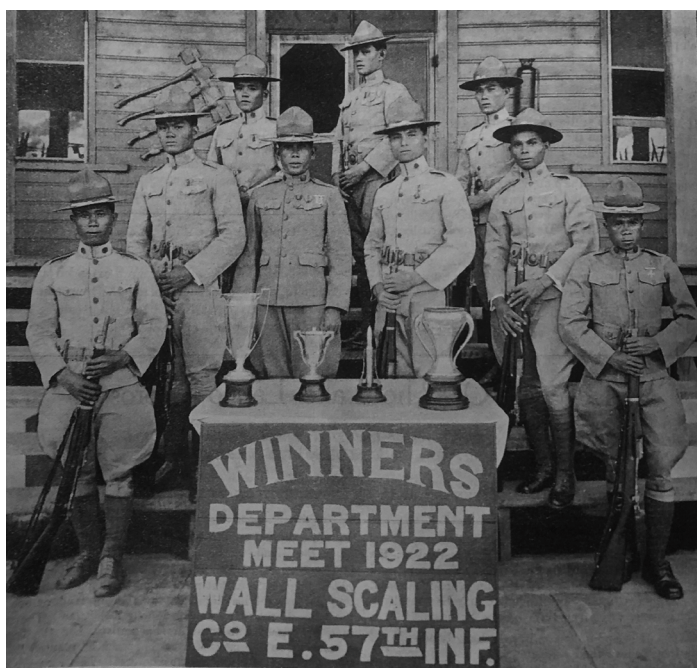


Image: “Champion Wall Scalers,” *The Fifty-Seventh Infantry Review* 1, no. 3 (April 1922), US Army Heritage and Education Center, Carlisle, PA.

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Hayden Kolowrat graduated from the University of Wisconsin–Madison in December 2020 with a BA in History. He is currently a master’s student at UW–Madison majoring in Southeast Asian studies and is an opinion editor of the *Badger Herald*. His research interests include modern US foreign relations and diplomatic history, post-1890 US imperial history, and US history in a global context. This article is an abridged version of his senior honors thesis, which was advised by Professor Alfred W. McCoy. Its research was made possible by the Hilldale Undergraduate/Faculty Research Fellowship, the Davis/Gerstein Undergraduate Research Award, and the Philip Levy Research Award in History.

For centuries, colonial armies guarded the expansive boundaries of European empires. These soldiers were colonial subjects, but their experiences contrasted sharply with the white European colonizers who ruled over them. As natives of these colonies, most of these soldiers were of different races and cultural backgrounds than the Europeans who conquered their lands. Despite such clear differences, colonial soldiers steadfastly served their European officers and often fought against other indigenous peoples that resisted colonial rule. Historians depict famed indigenous soldiers, such as Britain’s Indian Army or France’s Tonkinese Tirailleurs, as loyally serving their imperial rulers for decades before faltering amidst the rise of nationalist movements during the twentieth century. Based on these narratives, many historians argue that both colonial subjects and indigenous soldiers largely rejected European rule by the end of World War II.<sup>1</sup>

At the same time, one aging group of World War II veterans silently donates many of their wartime mementos to a museum in San Antonio, Texas, offering a different interpretation from their forgotten colonial military experience. Members of the local Philippine Scouts Heritage Society collect surviving artifacts from their service in the Pacific Theater to add to the displays at the Fort Sam Houston Museum. Here, they showcase an array of antique militaria, including Philippine bolo knives and carabao-headed insignias alongside traditional American M1 Grands and olive-green service jackets. Although this might seem like a perplexing mix of artifacts to a conventional military historian, this equipment was standard issue for America’s colonial army: the Philippine Scouts. The Philippine Scouts were regiments of the US Army composed entirely of Filipino soldiers and white American officers who served the United States during the first half of the twentieth century between the Philippine-American War and World War II. Unlike those serving in European colonial armies, these Filipino soldiers never expressed a desire for their country to become independent. Scouts instead migrated en masse to the United States after World War II. While soldiers of other colonial armies abandoned their military loyalties in the wake of their country’s independence, many of these Filipino veterans founded associations like the Philippine Scouts Heritage Society to proudly commemorate their military service to the United States.<sup>2</sup>

Traditional histories of imperialism largely neglect the experiences of the Philippine Scouts. In 1934, Colonel Charles H.

Franklin was the first to write about the Scouts in detail, noting his surprise to find that “none have written a comprehensive history of this unique military force” before him.<sup>3</sup> To this day, no one has published a complete study of the Scouts’ history. This episode in US colonial history deserves attention because the ambiguity of the Scouts’ military service disrupts the traditional anti-imperialist narratives of both Philippine and US nationalist historians. This leaves the Scouts’ history in a no-man’s land that historians on either side of the imperial divide are loath to traverse. From the small amount of scholarly work done, some historians wish to include the Scouts in the standard anti-colonial narrative and incorrectly describe the soldiers as “nascent nationalists.”<sup>4</sup> But these sources fail to examine the Scouts’ long history of loyalty that starkly contrasts with other more rebellious colonial armies. This study’s conclusions will offer new explanations of how colonial armies encouraged the formation of loyal imperial identities within colonial soldiers like the Scouts.

By comparing the processes of identity formation in the colonial militaries of four major imperial powers—Great Britain, France, the Netherlands, and the United States—this paper will highlight the development of two entirely different approaches Western officers used to influence colonial soldiers’ identities. Europe’s colonial armies ultimately failed to develop lasting imperial identities because officers could not maintain their strategy of using “martial race” theory to nurture loyal ethnic identities as recruitment expanded during the world wars.<sup>5</sup> In contrast, the US Army used the methods of selective recruitment, ethnic diversity, and socialization in Scout regiments to effectively foster Filipino-American identities among soldiers and ensure that Scouts loyally served the United States.

### **European Colonial Armies and Their “Martial Races” in Southeast Asia**

Hundreds of years before the creation of “martial race” theory, the European powers solicited support from indigenous mercenaries as they gradually colonized Southeast Asia. The Dutch were the first major European colonizer to arrive in the region, landing on the island of Java in the sixteenth century. They immediately competed with local princes for control of the region’s valuable trade routes and hired indigenous mercenaries to aid them. These Javanese princes saw the economic advantage

of siding with the Dutch and believed the Europeans could help them combat their traditional political rivals on the island.<sup>6</sup> By the nineteenth century, the British Empire emerged as the most dominant geopolitical player in India. The British succeeded by building a vast colonial force composed largely of indigenous Indian mercenaries called sepoy. British officers also recruited Burmese and Malay soldiers from their newly acquired Southeast Asian possessions.<sup>7</sup> By the 1850s, the French Empire expanded into modern day Vietnam, Cambodia, and Laos to create the colony of Indochina. Throughout their rule in Southeast Asia, the French attempted to form various colonial armies with indigenous people, but they ultimately placed greater trust in their more established African colonial army.<sup>8</sup>

After many years of depending on the fragile loyalties of various local militias, each imperial power eventually suffered from a crisis—such as mutiny, rebellion, or war—that strained their alliances with indigenous soldiers. These conflicts made European officers rethink their recruitment strategies in order to prevent further destabilization within their armies. Although the Dutch had recruited indigenous mercenaries in the East Indies for several centuries, the Java War (1825–1830) caused Dutch officers to distrust their Javanese recruits because the Dutch were forced to fight against several hostile armies of Javanese soldiers during the war.<sup>9</sup> Dutch officers, therefore, relied more on their Ambonese recruits and other indigenous soldiers from the outer islands of the East Indies to counteract the Javanese population’s sheer demographic power.<sup>10</sup> The British also restricted their recruitment to select indigenous groups—like the Sikhs, Nepali Gurkhas, and Muslims—after a sepoy mutiny in 1857 nearly destabilized Britain’s grasp of power in India. British officers chose these minority groups because they had all stayed relatively loyal to British forces during the Mutiny of 1857.<sup>11</sup> Since this new British Indian Army successfully suppressed future rebellions, the British decided against further experimentation with recruiting new indigenous armies. They also abandoned the recruitment of Burmese and Malay soldiers in favor of their more reliable Indian army.<sup>12</sup> Likewise, the French dealt with continuous insurrections in Indochina throughout the second half of the nineteenth century.<sup>13</sup> The administration of Indochina haphazardly raised four separate bodies of indigenous soldiers, all for the same purpose of quelling these insurrections.<sup>14</sup> The Jean-Louis de Lanessan administration assumed command in 1891 to organize the chaotic



mismanagement of indigenous soldiers and created a more solid colonial army by the turn of the century.<sup>15</sup> The French still relied heavily on their more established African colonial army, but they selectively recruited certain indigenous Asian soldiers as well.<sup>16</sup> As rebellions plagued their colonies, European officers chose to narrow their recruitment options to only certain ethnic groups that were believed to be most loyal.

Due to these changing recruitment methods, the British army developed a “martial race” theory to justify its actions. This theory claimed that certain ethnic groups had biological and cultural characteristics that made them inherently better-suited for soldiery than other ethnic groups. At the time, the British described various ethnic and religious groups as different races, each with their own traits. British officers taught this ideology to shape indigenous soldiers’ perceptions of their cultural identities and encourage loyalty to the British army. In an attempt to manipulate indigenous culture, the British Indian Army incorporated indigenous dress styles, weapons, and other symbolism into colonial regiments’ official uniforms. By convincing soldiers of their ethnic groups’ long military history, British officers indoctrinated indigenous soldiers with perceptions of their race’s “martial” superiority to foster unit solidarity.<sup>17</sup> For example, when dealing with Sikh soldiers, “the British insisted on outward signs of the Khalsa Brotherhood, the wearing of the kirpan or dagger, keeping uncut hair in a turban and carrying the Guru Granth Sahib or holy book at the head of the unit on march.”<sup>18</sup> By forcing soldiers to adhere to certain cultural practices while in the army, the British influenced soldiers to perceive their heritage as being especially militant and obedient to their European officers.

Once the British implemented their “martial race” theory, other European powers also adopted this recruitment model. The Dutch, for instance, labeled the Ambonese and other Moluccan people as inherently more “martial” than the majority Javanese population. As historians Karl Hack and Tobias Rettig point out, “The Ambonese became so closely identified with Dutch service that they were sometimes referred to as black Dutchmen.”<sup>19</sup> In fact, the Dutch nearly depleted the Moluccas of its able-bodied male population due to the pervasiveness of colonial enlistment within that region.<sup>20</sup> Meanwhile, the French Empire relied on African soldiers as its “martial race” because the French army never fully committed to one Asian race to replace them.<sup>21</sup>



The racial distinctions between who was and was not eligible for military service created a privileged subset of the population who could reap the benefits of employment in the colonial army. Outside of this subset, other ethnic communities also wished to create a “martial” tradition for themselves and participate in the colonial military. Oftentimes, because these groups lacked a military tradition before imperialism, Europeans deemed them too “effeminate” or “child-like” to serve as effective soldiers.<sup>22</sup> These neglected groups only redeemed themselves in imperial eyes as “martial races” once Europeans began considering them for recruitment later in the twentieth century.

While the Europeans’ strategy of creating militant ethnic identities helped them maintain loyal colonial armies until World War I, their colonial militaries needed more soldiers with advanced skills as military technology progressed. In addition, the world wars demanded fielding a larger number of soldiers than ever before. Consequently, the British Indian Army abandoned its racial restrictions for enlistment and recruited more Hindu and Malay soldiers than it had previously.<sup>23</sup> This expanded recruitment utterly failed. Since the British army had previously taught its colonial soldiers that some ethnic groups were inherently well-suited for combat, its traditionally “martial” populations often resented the army for recruiting from “unmartial” majority groups instead of themselves. Some colonial soldiers even switched their imperial loyalties to anti-colonist sentiments when the British denied soldiers’ privileges.<sup>24</sup> Similarly, renewed Malaysian and Burmese recruitment was unsuccessful because both groups were already building indigenous armies to fight for independence. Participation in these local organizations contributed to constructing Malaysian and Burmese nationalist identities rather than British imperial ones.<sup>25</sup> Clearly, even among traditionally “martial” soldiers, hardened allegiances could crack under the pressure of nationalist promises and imperial mismanagement.

“Martial race” theory similarly broke down in the Dutch East Indies. Since many Javanese revolts and wars had eroded Dutch faith in the populace’s loyalty, Dutch officers largely neglected the Javanese majority for recruitment.<sup>26</sup> The Dutch Empire’s reliance on European immigrants and Moluccan tribesmen, however, could not sustain the increasing demands for manpower required to control their vast East Indies possessions.<sup>27</sup> Therefore, the Dutch allowed more Javanese participation in military institutions, such as the *Marechaussee* units and the *Permuda* youth corps.<sup>28</sup> These

concessions gradually reinvigorated Javanese pride in their military history and challenged preconceived notions of their “martial” inferiority. Unfortunately for the Dutch, the Javanese eventually found acceptance in President Sukarno’s vision of an independent Indonesia and felt more welcomed than they ever had under the Dutch colonial state.<sup>29</sup>

For the French, intensified enlistment of African and Southeast Asian soldiers during World War II only worsened colonial living standards and fueled rising support for nationalist movements. The French already had few devoted colonial soldiers because their constant distrust and unwillingness to effectively indoctrinate recruits distanced indigenous people from French military culture.<sup>30</sup> By the end of World War II, Indochina and French Africa began their struggles for independence, and French colonial forces dramatically decreased in size until they were absorbed into the Proto-National Vietnamese National Army.<sup>31</sup>

Through convincing soldiers of their race’s supposed military characteristics, European armies used “martial race” theory to successfully create loyal colonial soldiers. Specifically, officers taught their soldiers that they were entitled to jobs and benefits in the military because their race was best suited for military service. But diversified recruitment during the world wars exposed the lie of “martial race” theory that colonial soldiers had believed. In fact, the Europeans showed their soldiers that people of any other race could serve in their positions if European officers wished it. By the end of World War II, this realization contributed to the collapse of loyalties within European colonial armies, and their nationalist adversaries ultimately won the hearts and minds of many former colonial soldiers.

### **The Philippine Scouts: Local Police or Imperial Soldiers? (1899–1917)**

Simultaneously, a vastly different colonial military experience was occurring in the Philippines. The United States had claimed the Philippines after its victorious war against Spain but continued to battle a strong Filipino independence movement in the years that followed.<sup>32</sup> In September of 1899, US Lieutenant Matthew Batson traveled three days through the marshes of the Pampanga Providence to the village of Macabebe, intending to recruit young men into a new colonial militia. Batson had observed the US Army’s difficulty navigating through the unfamiliar jungles

of the Philippines and proposed hiring indigenous Filipinos to guide American soldiers and possibly fight insurgents.<sup>33</sup> The US command had approved his plan because the citizens of Macabebe expressed a unique interest in joining the US Army. Batson told one reporter that when US soldiers first entered Pampanga: “The Macabebes welcomed our troops, furnished them with what provisions were to be had, and swore allegiance to the United States. They have remained loyal ever since.”<sup>34</sup>

The US Army also believed the Macabebes would make reliable soldiers. Most Macabebe men were highly experienced veterans of the Spanish army, and many had served for over fifteen years.<sup>35</sup> In addition, they opposed the current independence movement led by a different ethnic group, the Tagalogs.<sup>36</sup> After two months of living with the Macabebes, Batson felt confident that “they would render loyal and faithful service.”<sup>37</sup> He believed the Filipinos were the ideal candidates for founding a new colonial army and reiterated that “the experiment is well worth trying.”<sup>38</sup> After the US Army recruited them in limited numbers, the Macabebes continuously proved their combat expertise, causing the Americans to quickly establish several more companies.<sup>39</sup> Rather than being used as *scouts* as their name suggested, the new companies prepared for combat as light infantry where they would continue to serve for the rest of the organization’s history.<sup>40</sup>

Although US commanders mainly tasked the Filipino companies with combat roles, they did not trust Filipinos to be officers and entrusted white Americans with leading Scout units. As in other colonial armies, many officers questioned if indigenous soldiers would remain loyal and feared that Filipino recruits could be insurgents attempting to acquire more guns.<sup>41</sup> Many believed that their colonial soldiers might rebel against them once given arms, like during the infamous 1857 mutiny in India. These fears were amplified when initial reports of Macabebe units included graphic accounts of murder, rape, and torture of civilians and rebels alike.<sup>42</sup> Even Batson personally described the ruthlessness of the Macabebes in battle, saying that “little mercy will be shown to those who are carrying on guerilla warfare, or giving aid to them.”<sup>43</sup> News outlets and anti-imperialist politicians quickly broadcasted these horrors to the American public, hoping to discourage the US Army’s collaboration with indigenous people and reduce public support for the Philippine War.<sup>44</sup>

Instead of abandoning the recruitment of Filipino soldiers, American officers harshly punished guilty Macabebe soldiers

with long jail sentences and hefty fines.<sup>45</sup> The Americans realized they needed Filipino auxiliaries for their campaigns and could not afford to lose them. So, they expected strict adherence to their policies of proper conduct if soldiers wished to maintain their employment. By banning these brutal tactics, the US Army virtually eliminated cases of misconduct in the Scouts after these first few instances. Amending his earlier statement, Batson later commented that the Macabebes were “very well-behaved men” and “not by any means the innate devils that you read about.”<sup>46</sup>

The benefits of employment in the US Army were too lucrative for most Scouts to pass up. Despite being paid only half of the fifteen-dollar-a-month wage that white soldiers were given, their salary was over double what most young Filipino men made at the time. Few other occupations offered such high salaries.<sup>47</sup> The employment was also stable once it became evident that the United States planned to remain in the Philippines and would continue to fund a standing colonial army.<sup>48</sup> Amidst the uncertainty of a wartime economy and rising population levels, well-paying jobs were scarce, and military service was often the best option for many young, able-bodied men.<sup>49</sup> The US Army also provided useful services that many Filipinos did not otherwise have access to, such as elementary education and English-language training. Through these opportunities, many soldiers acquired useful skills that they could transfer to other occupations. These numerous benefits quickly became common knowledge, and admission was highly competitive. The Scouts received many applications which meant that the Army could be very selective, accepting only the most experienced and devoted soldiers for multiple enlistment periods.<sup>50</sup> Joining the Scouts became a status symbol and soldiers were proud of their imperial service because of their well-paying and competitive positions.<sup>51</sup>

Due to the Army's well-documented focus on Macabebe soldiers, many historians make spurious comparisons between the Americans' early recruitment of the Macabebes and other colonial armies' recruitment of “martial races.”<sup>52</sup> However, immediately after the Americans' initial successes using Macabebe soldiers, US commanders expanded indigenous recruitment to include many other ethnic groups throughout the archipelago.<sup>53</sup> During the Philippine-American War, various US Army garrisons throughout the islands used different strategies to pacify each region. They recruited their own indigenous units composed of men from local populations. Thus, the US command did not establish one

defined approach to indigenous recruitment, and each general enlisted diverse groups of indigenous people.<sup>54</sup> For example, even though the Filipino revolutionary movement consisted mostly of ethnically Tagalog people, the second indigenous unit established after Batson's was a Tagalog infantry unit.<sup>55</sup>

In the hostile southern islands, Americans recruited Muslims and experimented with units composed of several ethnic groups.<sup>56</sup> By mid-1902, over 5,500 Filipinos had joined the Scouts from all over the archipelago. Only about a quarter of them were Macabebes since the Americans had recruited thousands of men from a dozen other Philippine ethnic groups.<sup>57</sup> From the beginning of their experimental recruitment of indigenous soldiers, US commanders did not target specific races of Filipino soldiers but combined different ethnic groups into some of the most diverse units in US military history to that date. The companies' diversity negated the development of ethnic identities common in European colonial armies and encouraged a military identity constructed around a soldier's service to the imperial state.<sup>58</sup>

After the Scouts helped capture the last significant rebel bands by 1902, the organization faced an identity crisis. Despite the soldiers' initial oath to “faithfully serve the United States,” the Philippine civilian government argued that the highly trained Scouts were needed to help local police forces capture any remaining *ladrones*, or criminal bands, still roaming the countryside.<sup>59</sup> Confident in their abilities, Batson claimed the Scouts “would be just the troops for keeping the Island policed.”<sup>60</sup> However, the US Army preferred to keep the Scouts as an official part of its organization because hiring Filipinos lowered the cost of defending the archipelago. Officers also thought the Scouts were valuable soldiers and did not want to lose the colonial army they had built over the past three years.<sup>61</sup>

Governor-General William Howard Taft overrode the Army's objections and successfully lobbied Congress to pass a law requiring the Scouts to assist the local constabulary in policing duties.<sup>62</sup> As a result, thirty of the fifty Scout companies acted as quasi-military policemen alongside local constabulary units.<sup>63</sup> The two organizations' roles became so identical over time that many debated whether they should be officially combined.<sup>64</sup> In response, the US Army lobbied Congress to keep the Scouts as a distinct military organization and achieved legislation mandating the Scouts' separate role.<sup>65</sup> From 1907 onwards, the soldiers' separation from the police dramatically affected their identity formation.

Engineered socialization between Filipino soldiers further prevented ethnic identity formation within Scout regiments. Service in the Scouts required long-term deployments at various military bases which separated the soldiers from their home communities and encouraged the development of imperial identities. The US Army granted Scouts the unique privilege of living with their families off base to ease their transition into military life.<sup>66</sup> These Scout neighborhoods, called *barrios*, arose around every American military base in the Philippines. Within these neighborhoods, soldiers intermingled with other Scouts' families and recreated communities that closely resembled their traditional homes. While *barrios* allowed Scouts to live among other Filipinos, only other Philippine Scouts could live in them. As exclusive military communities, these neighborhoods also limited Scouts' interactions with non-US soldiers.<sup>67</sup> Their neighborhoods helped create a sense of community amidst the other Scouts' families where soldiers displayed pride in their service and inspired their children to enlist when they became old enough.<sup>68</sup> Isolating Scouts within *barrios* restricted their exposure to local influences that could alter their emerging military identities. In isolation, the Scouts and their families continued to believe in their importance to the US war effort, and soldiers passed along this tradition to their children.

While in this transitional period, it was unclear whether the Scouts would become policemen or carry on as soldiers. In the end, remaining a US military organization helped the Scouts maintain an aura of respect for their service. Moreover, the Army still needed the Scouts as soldiers in the years that followed when several Muslim sultanates in the southern Philippines continued to rebel against US rule. The Scouts fought effectively in the battles of Bud Dajo (1906, 1911) and Bud Bagsak (1913), and their experiences were often intense. On one occasion, Moro rebels ambushed a Scout patrol and nearly wiped it out. Scout Jose Nisperos was stabbed several times, almost losing his left arm. With his remaining arm, Nisperos continued to fire his rifle and dispersed the attacking party before it could completely annihilate his squadron. He survived the battle and became the first Asian American to receive the Congressional Medal of Honor for his bravery.<sup>69</sup> Stories like Nisperos's added to the Scouts' growing reputation as an exemplary military body that the Americans could trust. In another instance, Lieutenant Batson discovered documents from rebels offering Scouts hefty rewards for killing

their American officers, “but notwithstanding all these offers, I never yet had a desertion.”<sup>70</sup> The Scouts came to be respected for frequently showing as much willingness to die for the United States as white American soldiers, primarily because of examples like Nisperos and Batson’s men. As a result, the American military community gradually accepted the Scouts as a regular organization rather than as second-class auxiliaries.

Over the first two decades of the Philippine Scouts’ existence, they struggled to determine what type of organization they would become—whether they would strictly be a local police force, a supporting scout unit, or a skilled colonial army. No matter what role they were assigned, the Scouts consistently proved that they were loyal, elite soldiers with combat skills that equaled their white American counterparts. Their growing prestige undoubtedly helped the US Army argue in favor of maintaining them as a distinct military organization rather than devolving into more localized units. Their reputation permeated their military culture and made soldiers proud of their combat history within the US Army. In addition, the inclusion of all Philippine ethnic groups within Scout regiments further negated tribal loyalties. Scout identities therefore developed intertwined with their military service to the United States rather than with the emerging Philippine nation. Regardless of their reasons for entering or remaining in the US Army, Filipinos were proud to recognize themselves as Scouts, and their continued service only cemented their imperial identities.

### **Becoming American Soldiers (1917–1941)**

As in other colonial armies, the world wars demanded larger American forces, and many white soldiers left the Philippines for Europe. The lack of white soldiers in the Philippine garrisons required new Scout appointments to fill those positions and caused the number of Scouts to increase from about 5,500 to nearly 8,000 soldiers.<sup>71</sup> Accompanying this expansion, the Scout battalions were reorganized into regular US Army divisions by 1921.<sup>72</sup> President Woodrow Wilson’s policy of “Filipinization” in the US Army led to many Filipinos taking jobs traditionally held by white soldiers.<sup>73</sup> This policy would have been unthinkable only eight years prior, when the US Army was still actively engaged in combat against Filipinos. However, the defense of the Philippines remained a responsibility of the US Army for the time being. The Jones Act



of 1917 had guaranteed Philippine independence “as soon as a stable government can be established therein” but otherwise left the situation unresolved with no exact date for independence in sight.<sup>74</sup> With fewer white soldiers in the archipelago than ever before, the Scouts were the most logical replacement. US officers expressed little concern whether the Scouts were qualified for the job, as they were already trained as regular infantry battalions.<sup>75</sup> The reorganization expanded their responsibilities by offering training in field artillery regiments, medical details, and signal corps—all of which the Army had previously barred Filipinos from joining. It also updated their training, uniforms, and weaponry to match other infantry divisions on the US mainland. The Scouts were now virtually identical to all other American infantry divisions. For the first time since their creation, the Scouts appeared to be treated equally to their white counterparts.<sup>76</sup>

To fill new vacancies, the US Army accepted a more diverse pool of applicants than ever before. Among the relatives of Scouts and other typical applicants, veterans of the Philippine National Guard and Philippine Constabulary successfully applied to the Scouts given their prior military experience. Many of these new applicants were younger men raised under American colonial rule who had entirely different life experiences from Scouts of the previous generation. Younger soldiers were often highly educated and knew more English compared to the older Scouts, which was necessary as the Scouts’ tasks had grown increasingly more advanced after the reorganization.<sup>77</sup> These newer and more educated Scouts increasingly questioned the persisting inequalities in Scout regiments that the Army did not address despite the soldiers’ now equal duties. Their main complaint regarded Scouts’ pay, which had not deviated from the one-peso standard established in 1901. In fact, their salary was less than half of what a white soldier made and certainly did not reflect the wave of “Filipinization” policies from previous years.<sup>78</sup> Younger soldiers were also more politically educated and heard Philippine Commonwealth President Quezon give speeches promising that the Scouts would be treated more equally in an independent Philippines.<sup>79</sup> For these reasons, some new Scouts began to discuss how they might enact internal change. They devised a plan to protest the wage inequality by marching out of their camps and refusing to drill. While the march was meant to be a simple display to raise awareness of the existing issues in the US Army, it

backfired and incited intense retaliation from the US high command.<sup>80</sup>

What became known as the Scout Mutiny of 1924 was utterly unsuccessful in its aims and had dire consequences. American officers immediately suppressed the mutiny, and a military tribunal, headed by General Douglas MacArthur, tried the leaders of the movement. The court martial was unsympathetic to the mutineers' motives and gave them all five- to twenty-year prison sentences. After 1924, the Scouts never staged a mutiny again and displayed unfaltering loyalty for the rest of the organization's existence.<sup>81</sup> The US Army's harsh punishment was partly responsible. By jailing any dissenters and only hiring new soldiers willing to abide by the Army's policies, the Americans fostered a culture friendly to US Army life, thereby preventing any competing loyalties from surviving among the Scouts. According to one officer present, the best outcome of the mutiny was the “stiffening up of discipline” among the Scouts.<sup>82</sup> Afterward, “his battalion performed their duties in...an above average manner.”<sup>83</sup> Beyond punishment, the ever-present reality remained that, despite disparities, the benefits of service in the Scouts still outweighed those offered by other Philippine employers. After the mutiny, the Scouts indeed received a surge in applications to fill vacant spots, and this steady stream of applicants continued over the next few decades.<sup>84</sup> Never fearing a shortage of recruits, American officers had the flexibility to choose the most qualified—and potentially most loyal—candidates. By 1934, when Colonel Charles Franklin wrote his history of the Scouts, he said that the Scouts' devotion “need not be mentioned here, as their faithful and efficient services are a matter of common knowledge.”<sup>85</sup>

The US Army had the privilege of creating a body of soldiers that were not only loyal but exceptionally talented as well. After the end of the Philippine-American War, the Scouts saw little action. They spent most of their time training and preparing for future conflicts—something the Scouts took very seriously. In several marksmen competitions among US infantry regiments during the interwar period, Scout regiments consistently beat American regulars and received many awards. Often, US officers only knew of the Scouts as being exceptional marksmen, for it was not uncommon for every Scout in a regiment to have shooting scores qualifying them as sharpshooters.<sup>86</sup> Constant training likewise built a very athletic body of soldiers, and they frequently competed in friendly sporting competitions with white regiments.

Scout regiments routinely took home trophies from team events such as baseball, football, soccer, and polo.<sup>87</sup> In one such competition, the Forty-Fifth Infantry (Philippine Scouts) finished the day's meet with a total score of 237.5, while the nearest white regiment scored a distant 109. One Scout named Jikirum Adjaluddin finished first in every event he competed in and qualified to represent the United States in the 1932 Olympics in Los Angeles.<sup>88</sup> Other Scouts also proved their athletic prowess and went on to represent the United States in several Olympic games.<sup>89</sup>

These events only solidified the Scouts' loyalty to the United States by allowing enhanced training and socialization with other American soldiers. Life in the *barrios* and on military bases continued to distance Scouts from their local communities, bonding them closer to American soldiers. In the Forty-Fifth Infantry (PS), for instance, popular regimental songs such as "On a Bicycle Built for Two" and "I've Been Working on the Railroad" were sung by Filipinos and Americans alike.<sup>90</sup> Filipino representatives of the YMCA also traveled to Scout bases and provided soldiers with American magazines, radios, and phonographs. Records played contemporary American pop songs alongside "The Star-Spangled Banner."<sup>91</sup> Military life—and all its byproducts—thus helped to Americanize the Scouts. Since the Army continued to dismiss race requirements when recruiting, officers encouraged identity formation through the Scouts' military experiences as US soldiers. By encountering experiences apart from their race, Scouts began to form Filipino-American identities.

Although the Army cultivated the loyalty of the Scouts, this devotion continued to be tested. In 1934, Congress passed the Tydings-McDuffie Act, which promised the Philippines independence in ten years.<sup>92</sup> President Quezon tasked General Douglas MacArthur with building a national army to protect an independent Philippines, but MacArthur never had sufficient resources or congressional support to complete this goal entirely.<sup>93</sup> Though the Philippine Scouts were one of the most established officer corps available to help train this new army, few Scouts were interested in joining the Philippine Army, and most were satisfied with their commissions in the US Army.<sup>94</sup> Similar to two decades earlier when the Scouts resisted merging with the Philippine Constabulary, the Scouts did not wish to join a less prestigious and underpaying organization. They were proud of their accomplishments as US soldiers and enjoyed their privileges in the colonial army.

Despite this, the United States rarely reciprocated the Scouts’ commitment, and inequalities continued to persist. In 1931, Santos Miguel, who had joined the US Army in 1900, became the first Scout to serve for thirty years and qualify for the Army’s retirement benefits.<sup>95</sup> Unfortunately, the US Comptroller General’s office denied his pension claim, stating that it was “not authorized even by the remotest implication of the laws.”<sup>96</sup> After a two-and-a-half-year legal battle, his case reached the Supreme Court, and the justices ruled unanimously in favor of Miguel. With unqualified support, Justice George Sutherland wrote that “statutory provisions so clear and precise do not require construction.”<sup>97</sup> Miguel was awarded his pension and collected it until the Japanese invasion of the Philippines in 1941. Shortly after, Miguel rejoined his Scout unit and died in Bataan the following year.<sup>98</sup> Miguel’s case demonstrates how the Philippine Scouts responded to their continued struggle for equality with unfaltering loyalty.

### **America’s First Line of Defense (1941–1945)**

At 12:30 a.m. on December 8, 1941, hours after the bombing of Pearl Harbor, Japanese aircraft bombed Clark Air Base and the surrounding military installations. The waterfront headquarters of the US Asiatic Fleet in Manila received word of the attack on Pearl Harbor at 2:40 a.m. that same morning with a message stating: “Air Raid on Pearl Harbor. This is no drill.”<sup>99</sup> American commanders did little to prepare for the attack on Clark Air Base that destroyed all the US Air Force in East Asia, and this event is considered one of the worst military blunders in US history.<sup>100</sup> The first military engagement in the Philippines of World War II represented decades of neglected US military preparation for an impending conflict in East Asia and became the first of a series of losses to the superior Japanese invasion force. Outdated strategy, incomplete training, and meager supplies were all factors that weakened the American defense of the Philippines.<sup>101</sup> However, one exception to this disheartening narrative that exemplified the potential of what a strong US military could become was the Philippine Scouts. Outmatched and outgunned, MacArthur defaulted to the antiquated Battle Plan Orange and retreated with all United States Army Forces in the Far East (USAFPE) to the Bataan Peninsula. To save the remaining US-Filipino forces from a quick destruction, his primary task for the Scouts was to create a perimeter north of Bataan to stop the advancing Japanese army.

MacArthur hoped this would allow time for his remaining forces to retreat to the more defensible position on the Bataan Peninsula until American reinforcements arrived.<sup>102</sup> Thus, the Scouts became America's very first line of defense in World War II.

After landing in the Lingayen Gulf on December 21, the Japanese Imperial Army, battle-hardened from its Chinese campaign, advanced through Central Luzon unopposed until it met the Fifty-Seventh Scout Infantry dug in at Mabatang. On January 9, Japanese forces attacked Scout lines but were repulsed for five consecutive days with heavy casualties. Several weeks passed with little change. Eventually, the Japanese attempted to flank the defensive line and met the Scouts in three separate engagements called the Battle of the Points where only fifty soldiers survived from the original Japanese force of 1,200. The Scouts continued to successfully stop Japanese regulars, surprising the invading army which had not encountered such fierce resistance anywhere else in Southeast Asia. The Scouts' exceptional achievements earned them many decorations. The 2,100 Filipinos in the Fifty-Seventh Scout Infantry earned nine Distinguished Service Crosses, seventy-four Silver Stars, and at least 2,000 Bronze Stars.<sup>103</sup> In addition, the first three Congressional Medals of Honor in World War II were all awarded to Philippine Scouts.<sup>104</sup>

As the Scout regiments defended the Philippine Division's retreat, MacArthur transferred groups of sixty Scout officers to lead each of the ill-trained Philippine Army divisions. Their experience was desperately needed. While the Philippine Army reserve units had at most six months of basic training, one Scout unit, the Fifty-Fifth Infantry's Third Battalion, had 520 soldiers whose average experience in the regular army was seven years. MacArthur also called on retired Scouts to rejoin their units, which added much-needed experience to the defending force. Approximately 375 retired Scouts joined the Philippine Army's First Regular Division, but even these were not enough to lead the massive Filipino reserves. Since the Scouts generally reenlisted and held their positions for many years, few had retired, and only a small reserve of veterans was available to assist the USAFFE.<sup>105</sup>

The Scouts led the Philippine Army for nearly four months in defense of Bataan until widespread disease and supply shortages forced General Wainwright to surrender in April 1942.<sup>106</sup> The Japanese army forced the survivors to march to Camp O'Donnell some sixty miles away. This event, which became known as the "Bataan Death March," was infamous for the Japanese's

torture, starvation, and murder of 14,000 soldiers along its route.<sup>107</sup> Over half of the Scouts perished during the march and the following months of suffering in equally brutal Japanese concentration camps.<sup>108</sup> Those lucky enough to evade capture joined local resistance movements around the archipelago and formed guerilla units to prevent further Japanese occupation of the islands. Despite the Scouts’ exceptional qualifications to lead these units, either white American soldiers or politically savvy Philippine reserve officers usually assumed command.<sup>109</sup> Once again, American officers questioned the Scouts’ loyalty, but dedicated Scouts nonetheless participated in the resistance with no reported defections to the occupying Japanese government. When MacArthur returned to the Philippines, he called upon the remaining Scouts to join the liberation forces.<sup>110</sup> “Hardly one-half of the 12,000 loyal Scouts answered the roll call,” remembered one Scout.<sup>111</sup> The rest had either died at Bataan or in the suffering that followed.<sup>112</sup> It appears that premature sacrifice was the only limit to the Scouts’ devotion.

The US Army originally established the Scouts for the grand purpose of defending the Philippines. In this mission, the United States mostly failed. The ill-prepared defense of Bataan was of the Americans’ making because of decades of postponing necessary defense preparations and their unwillingness to provide the funds to make such improvements. As a result, the Japanese quickly occupied all the major cities in Luzon and destroyed the largest Philippine-American defense forces across the islands. The Scouts, however, should certainly not be blamed for the United States’ failure. The Scouts simply inherited an impossible task, which they successfully executed with the resources at their disposal. Their experience marked an extraordinary demonstration of courageous service and sacrifice. The Scouts used their elite training to slow a seasoned Japanese army for months and grant the United States its first victories of the war.

### **A Colonial Army in a Post-Colonial World (1945–Present)**

On September 2, 1945, the Japanese surrendered and officially ended World War II after a costly American victory in the Philippines. Reconquering the islands cost nearly 1.6 million war deaths on both sides.<sup>113</sup> Similar to the United States’ invasion of the Philippines almost fifty years earlier, the US Army called upon the Scouts to help reclaim the archipelago again during

World War II. Though many Scouts did not survive the war, those that remained questioned whether they would continue to serve the United States after the Philippines became independent. Many decided to reenlist.<sup>114</sup> Consequently, the United States began to rebuild its colonial army in the Philippines at the same time it advocated for global decolonization elsewhere. After reconquering the Philippines, even more Filipinos were needed to replenish American ranks and provide much-needed manpower to occupy Japan. On October 6, 1945, Congress happily passed the Armed Forces Voluntary Recruitment Act, which authorized the expansion of the Scouts recruitment capacity from 12,000 to 50,000 soldiers.<sup>115</sup> The US Army dubbed the expanded organization the New Scouts to differentiate it from the older, prewar regiments.<sup>116</sup> The bill's sponsor, Senator Carl Hayden, reflected on "what a magnificent body of troops the Philippine Scouts" was and boasted how the enlistment of Scouts would allow the US Army to "reduce the number of our own men."<sup>117</sup>

Due to the Scout regiments' enduring loyalty and sacrifices at Bataan, the US Army recruited a higher number of Filipinos than any other minority group from the continental United States. Many of the surviving Old Scouts joined the new organization and led the younger recruits on their first overseas deployments. The Old Scouts were united from their wartime service and superimposed their developed military identity onto their more inexperienced counterparts. Tens of thousands of Filipinos subsequently applied to join the Scouts, but the Army maintained the rigor of the traditional Scout application process, accepting only about 44 percent of applicants.<sup>118</sup> With the Army recruiting 38,000 soldiers into the New Scouts, Filipinos comprised a substantial fraction of the 262,000 soldiers in US forces occupying Japan and Okinawa.<sup>119</sup> America's colonial army had indeed been revived.

Shortly after the creation of the New Scouts, however, the US Army and other government officials developed reservations about the organization's longevity. Following World War II, the United States pressured the European empires to liberate their colonies and dissolve their colonial armies as the world entered a post-colonial age. Although the United States led by example in declaring its Philippine colony's independence, the government ignored its rhetoric regarding its own colonial army, which the US Army officially maintained for four years after the end of the war. The US military still heavily relied on the Philippine Scouts,



who were eager to apply and replace the dwindling number of white recruits. But this paradoxical army could not last forever. Under the Tydings-McDuffie Act, the Philippines would become an independent nation on July 4, 1946. The Army's policy “of not receiving and using organized foreign troops as a part of the American military establishment” raised questions about the legality of maintaining the Scouts past that date.<sup>120</sup> Soon, the US Army in Asia would be composed of 38,000 foreign nationals. Nonetheless, the need for postwar manpower and a lingering attachment to the organization momentarily saved it from dissolution.

When American soldiers returned to the United States after the war, most Scouts wished to go with them. Through their years of service in the US Army, grueling wartime experiences at Bataan, and history of fighting side by side with other US soldiers, the Scouts' sustained devotion to America dissolved any lingering nationalist identity within themselves. A Filipino-American identity was all that remained.<sup>121</sup> Many Scouts therefore hoped to reenlist in the Army, and almost all longed to immigrate to the United States once the Philippines became independent. Many other Americans agreed. The Nationality Act of 1940 allowed noncitizen soldiers to become naturalized citizens, and President Truman approvingly stated, “I consider it a moral obligation of the United States to look after the welfare of the Filipino Army veterans.”<sup>122</sup>

Despite the president's approval, other American officials discouraged Filipino naturalization in fear of large-scale Asian migration to the United States. As Attorney General Clark said, “It would be a political embarrassment and a drain of manpower to have a mass exodus of the young Filipino ex-fighting men and women going to the United States on the eve of the independence of the new nation.”<sup>123</sup> Thousands, if not hundreds of thousands, of Filipino veterans were subsequently denied naturalization. For years afterward, these veterans lobbied Congress to dispense their wartime benefits and recognize their service.<sup>124</sup> Of the 4,000 Filipinos who were naturalized, all were Old Philippine Scouts. Almost the entire surviving organization chose to become American citizens and migrate to the United States alongside their American brothers-in-arms.<sup>125</sup> The New Scouts, who were not nearly as decorated and Americanized as the Old Scouts, also served in the hope that they could someday gain naturalization.<sup>126</sup>

Hence, a colonial army persisted in a post-colonial world, with dreams of living to see the imperial homeland.

For decades, former Scouts lived in the United States, but the US Congress ignored the veterans' pleas for citizenship, retirement benefits, and recognition of their service. In an interview from 2009, veteran Franco Arcebal said: "We were loyal to the United States. Even up to now, we are loyal to the United States, except that the United States has forgotten us in many ways."<sup>127</sup> These soldiers became some of the first people of Asian descent allowed into the United States, and they helped found the first Filipino-American communities along the West Coast. The family traditions of Scout service lived on in following generations, as younger Filipino-Americans continued to join the US military. For example, Antonio Taguba, the son of a former Scout, became the second major general in the US Army of Philippine birth. In a speech to veterans of the Philippine Scouts and other major American wars, he expressed his collective gratitude to all of America's veterans, telling them that "you too are the pillars of inspiration for our nation and we remain indebted to your remarkable service and sacrifice."<sup>128</sup> Taguba's words reflected both his and the Filipino-American community's desire for Americans to recognize all veterans' service to the United States. Taguba and his father are examples of how the Scouts ultimately rejected Philippine independence by immigrating to the United States.

## Conclusion

By the end of World War II, the colonial soldiers of Southeast Asia had largely shifted their allegiances to independence movements and abandoned any remaining loyalty to their former imperial armies. The Philippine Scouts were an exception to this trend. Throughout the United States' colonial rule in the Philippines, the US Army successfully fostered a resilient imperial identity in its colonial soldiers, while other armies in the region failed to maintain their soldiers' loyalty.

As the twentieth century dawned, European officers struggled to maintain their recruitment standards, while American officers preserved their own meritocratic selection of Scouts. For Europeans, participation in the two world wars and other localized conflicts required fielding an unprecedented amount of indigenous soldiers. Such a strain forced imperial officers to recruit from ethnic groups that had long been excluded from

each empire’s colonial military culture. These recruits had already been exposed to anti-colonial ideologies, thereby limiting their proclivity towards loyal service. Despite conflicts of their own, the Americans continued to selectively recruit Filipinos for the Scouts and were able to admit only the most dedicated soldiers. Recruitment quotas for the Scouts never sufficiently increased enough to weaken the US Army’s intensive selection process. Unlike other colonial armies that needed many soldiers, American officers were not afraid to remove any Scout that did not adhere to the collective ideology. Misconduct and mutiny were quickly extinguished in the Scout regiments to prevent harming morale. While there were surprisingly few instances of misbehavior in the Scouts, US Army officers responded to those that occurred with long prison sentences. These harsh punishments showed soldiers that the United States only tolerated unwavering support. As the Scout motto put it, “Our Strength is in Loyalty.”<sup>129</sup> Other colonial armies had to augment their forces with soldiers inundated with nationalist sentiments, whereas the US Army’s exclusive membership shielded the Scouts from such rebellious influences.

European colonial soldiers’ loyalties deteriorated as the lies of “martial race” theory were exposed—a problem completely foreign to US officers that had always recruited from diverse indigenous populations. Established units in European colonial armies had formed collective identities around their race’s supposed “martial” abilities and the privileges that military service allowed them. As other races suddenly became “martial” and gained privileges that had once been exclusive, formerly loyal soldiers questioned their “martial” identities and became wary of their imperial employers. The promises of independence often captivated these soldiers in imperial states that had come to disappoint them. By the end of World War II, the Europeans’ lack of trust in their colonial armies gradually degraded their soldiers’ loyalties. In contrast, the Philippine Scouts remained unified around a collective-unit ideology for the entirety of their service. American officers encouraged an imperial identity that made soldiers proud of their service as Filipino-American soldiers rather than as Tagalogs or Macabebes. Although weak ethnic identities held European colonial armies together, the Americans’ choice to include all ethnicities in the Scouts prevented identity formation around a specific race or nation and allowed Filipinos to fully integrate into the military culture.

Furthermore, while other colonial armies were auxiliaries to the leading imperial force, the Philippine Scouts was always an official organization in the US Army. American officers' relentless efforts to keep the Scouts in the Army separated the soldiers from localized institutions and fully immersed them in US military culture. Other colonial armies struggled to socialize their soldiers over time, but the US Army successfully socialized soldiers between different races to create a singular regimental identity constructed around their military service. Moreover, the Scouts' separation from the rest of Philippine society and their work in secluded *barrios* encouraged the development of imperial identities, unlike their civilian compatriots. Despite unfair conduct towards the Scouts, the US Army still treated Scouts as regular US infantry soldiers and increasingly trusted them with roles previously reserved for white soldiers. Ultimately, the Scouts' relatively equal status in the Army was singular among the second-class colonial soldiers of other empires who never felt truly part of their military's culture.

The history of colonial armies mainly records soldiers who discarded their imperial loyalties and became nationalists who fought for their country's independence. Diverging from this narrative, the Philippine Scouts never became nationalists but instead remained staunch supporters of American imperial rule—even after the Philippines became independent. In one of the few accounts from a Filipino veteran of the Scouts, Antonio Tabaniag explained, "They performed their duties loyally and faithfully because they believed in America and the things America represents."<sup>130</sup> The Scouts' experiences were certainly unique in comparison to other colonial armies because the Filipino soldiers only fought alongside others who self-identified as Americans. A significant portion thus chose to abandon the Philippines and immigrate to the United States. Indeed, all 4,000 Filipinos naturalized by the US government after World War II were Philippine Scouts. The Scouts' final act of favoring imperial loyalty over national identity exemplifies the Scouts' proud heritage of serving in America's colonial army and their desire to become new citizens of the United States.

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2. For more on the Philippine Scouts Heritage Society, see John E. Olson, *The Philippine Scouts* (San Antonio: The Philippine Scouts Heritage Society, 1996). To access their website, see <https://www.philippinescouts.org>.
3. Charles H. Franklin, comp., *History of the Philippine Scouts, 1899–1934* (US Army War College, 1935), p. 65.
4. Two historians discuss the Scouts’ role as “nascent nationalists,” see Christopher Capozzola, “The Secret Soldiers’ Union: Labor and Soldier Politics in the Philippine Scout Mutiny of 1924,” in *Making the Empire Work: Labor and United States Imperialism*, ed. Daniel E. Bender and Jana K. Lipman (New York: New York University Press, 2015), p. 86; Richard Meixsel, “The Philippine Scout Mutiny of 1924,” *South East Asia Research* 10, no. 3 (November 2002): 358. While Meixsel explicitly states that the Scouts “were not nascent nationalists,” he also questions their loyalty and compares their experiences with other colonial armies in Hack and Rettig, eds. *Colonial Armies in Southeast Asia*, pp. 162–184.
5. For an in-depth discussion on “martial race” theory, see Heather Streets, *Martial Races: The Military, Race and Masculinity in British Imperial Culture, 1857–1914* (New York: Manchester University Press, 2004).
6. C.A. Bayly, “Two Colonial Revolts: The Java War, 1825–30, and the Indian ‘Mutiny’ of 1857–59,” in *Two Colonial Empires: Comparative Essays on the History of India and Indonesia in the Nineteenth Century*, ed. C.A. Bayly and D.H.A. Kolff (Dordrecht: Martinus Nijhoff Publishers, 1986), pp. 111–13.
7. G.J. Bryant, “Indigenous Mercenaries in the Service of European Imperialists: The Case of the Sepoys in the Early British Indian Army, 1750–1800,” *War in History* 7, no. 1 (2000): 2–28.
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9. Karl Hack and Tobias Rettig, eds., “Demography and Domination in Southeast Asia,” in *Colonial Armies in Southeast Asia* (New York: Routledge, 2006), pp. 51–52.
10. Gerke Teitler, “The Mixed Company: Fighting Power and Ethnic Relations in the Dutch Colonial Army, 1890–1920,” in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge, 2006), pp. 149–50.
11. Imy, *Faithful Fighters*, pp. 4–5.
12. For details on Burmese recruitment, see Robert H. Taylor, “Colonial Forces in British Burma: A National Army Postponed,” in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge,

- 2006), p. 185. For details on Malay recruitment, see Karl Hack, "Imperialism and Decolonisation in Southeast Asia: Colonial Forces and British World Power," in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge, 2006), pp. 228–30.
13. Sarah Womack, "Ethnicity and Martial Races: The Garde Indigene of Cambodia in the 1880s and 1890s," in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge, 2006), p. 100.
14. Henri Eckert, "Double-Edged Swords of Conquest in Indochina: Tirailleurs Tonkinois, Chasseurs Annamites and Militias, 1883–1895," in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge, 2006), p. 119.
15. Eckert, "Double-Edged Swords," pp. 139–41.
16. Ruth Ginio, "African Troops in the Wars of Decolonization: Indochina, 1946–1954," in *The French Army and Its African Soldiers: The Years of Decolonization* (Lincoln: University of Nebraska Press, 2017), pp. 77–104.
17. For further discussion on "martial race" theory, see Streets, *Martial Races*, pp. 1–13.
18. Karl Hack and Tobias Rettig, eds., "Imperial Systems of Power, Colonial Force and the Making of Modern Southeast Asia," in *Colonial Armies in Southeast Asia* (New York: Routledge, 2006), p. 25.
19. Hack and Rettig, "Imperial Systems of Power," pp. 11–12.
20. Teitler, "Mixed Company," p. 150.
21. Ginio, "African Troops," pp. 77–104.
22. Hack and Rettig, "Imperial Systems of Power," p. 12.
23. Kevin Blackburn, "Colonial Forces as Postcolonial Memories: The Commemoration and Memory of the Malay Regiment in Modern Malaysia and Singapore," in *Colonial Armies in Southeast Asia*, ed. Karl Hack and Tobias Rettig (New York: Routledge, 2006), p. 288.
24. Imy, *Faithful Fighters*, pp. 24–51.
25. For details on Malaysian recruitment, see Blackburn, "Colonial Forces as Postcolonial Memories," p. 305. For details on Burmese recruitment, see Taylor, "Colonial Forces in British Burma," p. 195.
26. Bayly, "Two Colonial Revolts," pp. 111–13.
27. Teitler, "Mixed Company," p. 150.
28. Teitler, "Mixed Company," pp. 153–59.
29. Teitler, "Mixed Company," pp. 146–57.
30. Womack, "Ethnicity and Martial Races," pp. 114–15.
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33. Matthew Batson to the Adjunct General of the 8<sup>th</sup> Army, 1 September 1899, Box 1, Batson Papers, United States Army Heritage and Education

## “Our Strength is in Loyalty”

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34. Batson quoted in newspaper clipping, “The Macabebe Scouts,” 1900, Box 1, Batson Papers, USAHEC.
35. Headquarters to Batson, 6 October 1899, Box 1, Batson Papers, USAHEC.
36. Typed copies of Batson’s Letters, 17 September 1899, Box 2, Batson Papers, USAHEC. For more discussions on American recruitment of Tagalogs, see Franklin, comp., *History of the Philippine Scouts*, pp. 7–11; Clayton D. Laurie, “The Philippine Scouts: America’s Colonial Army, 1899–1913,” *Philippine Studies* 37, no. 2 (Second Quarter, 1989): 178–79; James Woolard, “The Philippine Scouts: The Development of America’s Colonial Army” (PhD diss., Ohio State University, 1975), 5–7, 12.
37. Matthew Batson to the Adjunct General of the 8<sup>th</sup> Army, 16 July 1899, Box 1, Batson Papers, USAHEC.
38. Batson to the Adjunct General of the 8<sup>th</sup> Army, 16 July 1899, Box 1.
39. Telegram from Schwan to Lawton, 18 October 1899, Box 3, Batson Papers, USAHEC; Headquarters to Batson, 6 October 1899; General Young to the Adjunct General of the 8<sup>th</sup> Army, 16 October 1899, Box 1, Batson Papers, USAHEC. For further discussion on early Filipino recruitment, see Franklin, comp., *History of the Philippine Scouts*, pp. 7–17; “Two More Macabebe Companies,” *New York Times*, December 2, 1899; Linn, *The Philippine War*, p. 128.
40. Telegram from Lawton to Schwan, 18 October 1899, Box 3, Batson Papers, USAHEC. Also, see Tabaniag, “The Pre-War Philippine Scouts,” 13; Christopher Capozzola, *Bound By War* (New York: Basic Books, 2020), p. 37.
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44. “New Filipino Horse,” *New York Times*, July 17, 1900; “Testified on ‘Water Cure’,” *New York Times*, April 22, 1902; “One ‘Water Cure’ Victim,” *New York Times*, May 11, 1902; “‘Water Cure’ and Wine,” *New York Times*, May 16, 1902; “Tortures and Tortures,” *New York Times*, July



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45. Clarence R. Edwards, Special Field Orders #29, 30, and 32, 2–8 December 1899, Box 1, Batson Papers, USAHEC.

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47. Batson to the Adjunct General of the 8<sup>th</sup> Army, 1 September 1899, Box 1; Headquarters Division of the Philippines, General Orders No. 25, 24 May 1900, Box 1, Batson Papers, USAHEC; Franklin, comp., *History of the Philippine Scouts*, pp. 11–14, 97–106; “New Filipino Horse,” 17 July 1900. For further discussion on Scout pay, see Laurie, “Philippine Scouts,” 182; Meixsel, “The Philippine Scout Mutiny,” 348.

48. Woolard, “The Philippine Scouts,” 241.

49. Woolard, “The Philippine Scouts,” 72–73. For further discussion on other employment opportunities for Scouts, see Meixsel, “The Philippine Scout Mutiny,” 357; Laurie, “Philippine Scouts,” 191.

50. Robert Ginsburgh, “Philippine Scouts Now An Efficient Little Army,” *New York Times*, November 8, 1931. For further discussion on benefits and admission, see Meixsel, “The Philippine Scout Mutiny,” 357.

51. I.A. Hunt, “A Sergeant in the Scouts for Seventeen Years,” *57<sup>th</sup> Infantry Review* 1 (Fort William McKinley, P.I.), no. 4 (June 1922): 4. For further discussion on Scout pride in their service, see Woolard, “The Philippine Scouts,” 65, 70, 232, 235–36, 259; Meixsel, “The Philippine Scout Mutiny,” 338–39, 357–58.

52. For comparison of the Scouts with other colonial armies, see Hack and Rettig, eds., *Colonial Armies in Southeast Asia*.

53. Franklin, comp., *History of the Philippine Scouts*, p. 119.

54. Typed copies of Batson’s letters, 12 October 1900, Box 2, Batson Papers, USAHEC; Tabaniag, “The Pre-War Philippine Scouts,” 9. For a succinct discussion on the United States Army campaign strategy in the Philippines, see Linn, *The Philippine War*, pp. 128–29; Edward M. Coffman, *The Embattled Past: Reflections on Military History* (Lexington: University Press of Kentucky, 2014), p. 71. For specific examples of the US Army’s recruitment of diverse indigenous groups, see Woolard, “The Philippine Scouts,” 17, 56–58, 72–74, 236–38; Laurie, “Philippine Scouts,” 182–83.

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56. *Yearbook of the Forty Fifth Infantry (Philippine Scouts)*, 4 June 1929, USAHEC, 16–17, 21–22; Woolard, “The Philippine Scouts,” 73–74.

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58. Batson speaks about this to a reporter in “Batson’s Opinion of Native Troops,” 1900, Box 1, Batson Papers, USAHEC.

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62. Woolard, "The Philippine Scouts," 90–98.

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73. Capozzola, *Bound By War*, p. 87.

74. Capozzola, *Bound By War*, p. 87.

75. Woolard, "The Philippine Scouts," 178–81.

76. Edward M. Almond, Oral History, Box 1, Almond Papers, USAHEC, 40–45; Franklin, comp., *History of the Philippine Scouts*, pp. 27–39; Tabaniag, "The Pre-War Philippine Scouts," 13–15. For further discussion on the Scouts' new roles, see Capozzola, *Bound By War*, p. 88; Olson, *Philippine Scouts*, p. 17.

77. Olson, *Philippine Scouts*, p. 270; Meixsel, "An Army for Independence?," 185.

78. Meixsel, "The Philippine Scout Mutiny," 348–49; Capozzola, "Secret Soldiers' Union," p. 89.

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88. "Despite Shanghai Events," Box 16.
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# Personalizing the Pandemic

A Documentary History of UW–Madison Student Experiences in  
the Year of COVID-19

ARCHIVE *Editorial Board*



Statue: Douwe Blumberg, *Well Red* (Madison, Wisconsin, 2017).

Image: Taylor Madl, *Masked Bucky Badger Statue* (Madison, Wisconsin, 2021).



## Introduction

The sudden onset of the COVID-19 pandemic in 2020 turned the world upside down. Nations worldwide grappled with the effects of the virus and struggled to provide safe solutions for the everyday operations of businesses, schools, and government services. As university students, our educational experiences were fundamentally transformed. The pandemic engendered changes that have had, and continue to have, a profound impact on the daily lives of people around the world.

The unprecedented nature of this global event inspired our editorial board to create a project centered around the pandemic, with two particular goals in mind. First, we wanted to contextualize the complicated undergraduate student experience that has characterized the past three semesters. In consideration of the transition to online learning, we wished to capture the trials and tribulations of student life during the pandemic. Second, as undergraduate history students at UW–Madison, we wanted to engage with a new aspect of historical research—collecting, preserving, and curating primary source material. With these goals in mind, we strove to compile a documentary history of student experiences at our university in the year of COVID-19, recording the personal stories of various students and highlighting the challenges they have faced.

The project consists of three parts. The first focuses on the communication UW–Madison students received from university administration between March 2020 and March 2021. This section contains a collection of key emails, some published as images in their full original format and others as excerpted text, which highlight significant moments in the university's pandemic response. The second portion centers around what UW–Madison students reported in student newspapers about the events of the past year. These newspapers were selected from the *Daily Cardinal*, a student-run UW–Madison newspaper, to supplement the preceding emails and exhibit student writing in response to the pandemic. Finally, the third section contains the transcripts of five oral histories which showcase what students recalled from their own pandemic experiences. These oral history interviews were conducted by fellow *ARCHIVE* Editor Alex Moriarty with members of our editorial board and the previous editor-in-chief. The conversations document a wide range of student perspectives. The first spotlights a student who traveled home in the spring

and returned to campus in the fall. The second follows a student who was living in the university's residence halls at the onset of the pandemic. The next two feature a student who was studying abroad in March 2020 and an international student, respectively. The journal then concludes with an interview from the former editor-in-chief who published Volume 23 of *ARCHIVE* in the midst of the pandemic.

By combining what students saw in official university correspondence, what they wrote for student newspapers, and what they remembered through oral histories, this project provides a small but diverse documentary history of UW–Madison student experiences during the year of COVID-19. We aimed to personalize and humanize the pandemic, carefully treating what was, for many people, an incredibly difficult period. In the end, we hope this project will serve as a collection of valuable primary source material for future historians and students of history.

*As a note, the following email communications and newspaper articles have been reproduced as they appeared in their original form. We have occasionally placed “[sic]” after writing that may be grammatically or syntactically confusing in order to preserve the writer’s words while acknowledging the potentially unclear nature of the text. Additionally, some of the emails and oral history transcripts contain only excerpts of the original text. The location of missing material is indicated by centered freestanding ellipses whether the text that has been removed originally came before, after, or in the middle of the published excerpts. With respect to the oral history interviews, all of the transcripts label the interviewer, Alex Moriarty, as “Interviewer.” The transcripts have been edited for reading clarity.*

# What the Students Saw

*University of Wisconsin–Madison Email Communications*

## **“Updates to Campus Operations,” March 11, 2020, Chancellor Rebecca Blank to UW–Madison Students, Faculty, and Staff**

*On Wednesday, March 11, 2020, Chancellor Rebecca Blank sent an email to students, faculty, and staff outlining significant changes to classroom instruction, student housing, and university-sponsored travel. Although the number of cases in Dane County at the time was relatively small, the university enacted these changes, similar to other schools’ decisions across the country, in response to the spread of COVID-19. This email, reproduced in full below, marked a transition to an entirely new format of life and collegiate learning that ultimately extended far beyond the spring semester.*



*This message is being translated into multiple languages and will be posted on the UW–Madison COVID-19 website.*

To our students, faculty and staff,

COVID-19 continues to spread and affect many parts of the U.S. and the rest of the world. UW-Madison is working to mitigate the effects of the disease on our campus population, in consultation with local, state and federal partners.

The health of our community is our most important priority.

While there are relatively few confirmed cases of COVID-19 in Dane County, the number of cases nationally continues to grow. Our health partners tell us that now is the best time to act in ways that slow the spread.

## ARCHIVE

Let me share several major decisions about the rest of the semester.

We appreciate your flexibility and understanding in advance. At this moment, we can't account for every possibility and scenario, but will continue to communicate about this situation and answer your individual questions as best we are able via [chancellor@wisc.edu](mailto:chancellor@wisc.edu).

### **Instruction**

To lessen the risk to our community as much as possible, UW-Madison will suspend Spring Semester face-to-face instruction effective Monday, March 23, the date that classes would typically resume after next week's Spring Break.

Alternate delivery of classes will begin on March 23 and continue at least through Friday, April 10. A decision on when and whether in-person instruction will resume will be shared in early April. Students will receive additional information about this transition in the next few days.

### **Undergraduate residence halls**

We are particularly concerned about the safety of students in our residence halls who share bathrooms and eating facilities and live very closely together.

Residents are being asked to take essential belongings, academic materials, laptops and medications with them for Spring Break and not return to residence halls following Spring Break through at least April 10. We hope that students will return to their permanent residence and complete their coursework remotely. A follow-up communication will be sent by University Housing to all affected residents shortly.

We recognize that some students may be unable to return to their permanent residence for various reasons and will need to stay in their residence halls. For instance, some international students will not be able to return home at this time; some students may be unable to access online classes in their home location; some may need to stay in Madison for other reasons.

University Housing will provide additional guidance to students. Residence halls will remain available to these students where necessary, but we expect the majority of dorm residents to return home, leaving the residence halls much emptier and making it easier for remaining students to maintain social distance.

Students who stay in residence halls should be prepared for a reduced campus experience with limited opportunities for interaction and reduced campus services.

### **Off-campus residents**

We expect that most off-campus residents will remain in Madison and continue their studies remotely, although some may choose to remain in their permanent location past the end of spring break.

# Personalizing the Pandemic

## Employees

Campus will remain open and all faculty and staff should continue their regular work schedules unless advised otherwise by their dean, director or supervisor. The university will continue daily operations, with some exceptions around travel and events, noted below. Faculty and instructional staff will receive detailed information from the Provost's Office about the transition to alternative delivery of instruction.

## Travel

All university-sponsored travel is cancelled through April 10, with limited exceptions from academic deans or vice chancellors. People who travel regularly as part of their job (such as Extension workers covering several counties) will typically continue to do so, but should check with their deans or other unit directors.

We strongly advise you to reconsider non-essential personal travel, including travel over Spring Break. Documented cases are growing rapidly both domestically and internationally. You may face a higher risk of infection, significant delays returning, and/or the requirement to self-isolate upon your return, all of which could significantly impact your professional and personal obligations at great individual expense.

All campus community members should be aware that if you travel, you may be required to self-isolate for 14 days depending on where you're traveling to and from, even if you do not exhibit symptoms.

You can view a list of currently impacted areas that require a self-quarantine here: <https://www.cdc.gov/coronavirus/2019-ncov/travelers/after-travel-precautions.html>.

Note that this list could change at any time, including while you are on your trip.

## Events

All campus events (including Division of Extension sponsored events outside of Dane County) of more than 50 people are canceled through at least April 10, with limited exceptions to be granted by deans or vice chancellors.

## If you develop symptoms

If you develop symptoms, stay at home – please do not come to work or class if you are ill. If symptoms like fever, cough, or difficulty breathing are present, you are advised to contact your health care provider for advice.

Employees should not report to work if they are ill and should use sick leave or contact their supervisor or HR rep. Faculty and instructional staff are advised to continue to show flexibility to students around academic assignments, exams or other requirements.

## Respect for one another

We have heard of instances of slurs and profiling directed toward individuals wearing masks or those of Asian descent. Some students have told us that they feel self-conscious coughing in public, they encounter racist comments and jokes, or they experience social distancing on public transportation, in classes, and in groups.

Racist behaviors or stereotyping in or outside of the classroom are not acceptable at UW–Madison. We encourage students who experienced harassment or discrimination to file a bias incident report. Employees may file a complaint with the Office of Compliance. We need everyone's support during this challenging time and to treat each other with respect and kindness.

While students may not feel like COVID-19 will affect them if they are young or healthy, please remember that you are members of a larger community and could carry it to those with compromised immune systems or to older or higher-risk people. There is no vaccine or protection at this time. We ask everyone to consider the safety and health of our entire community.

As you know, this is a constantly evolving situation. Thank you to everyone for their patience and creativity as we deal with these changes over the next month. We'll continue to adapt our plans as information changes, keeping the health and safety of our campus community at the center of our decisions to update campus.

Please visit our website at <http://covid19.wisc.edu>, email us at [chancellor@wisc.edu](mailto:chancellor@wisc.edu) or call Campus and Visitor Relations at (608) 263-2400.

Chancellor Rebecca Blank



You are receiving this communication because you are a member of UW-Madison and included on distribution lists for official university correspondence.

Members of UW-Madison are not able to unsubscribe from these lists.



**“Updates to Housing Operations,” March 11, 2020, University Housing to UW–Madison Housing Residents**

*On the same day that Chancellor Blank released changes to campus operations, University Housing sent a supplemental email to housing residents with more information on how UW–Madison’s decision would affect resident life. The university asked students to return to their permanent addresses given the close quarters of residence halls. This announcement triggered an impromptu exodus of dorm inhabitants mere days before spring break. Various exceptions were allowed to ensure student safety. What follows is an excerpt from the beginning of this email detailing the timeline and procedure for dorm occupants to relocate.*

Dear Resident,

As announced this morning, UW–Madison has decided to suspend Spring Semester face-to-face instruction from March 14 until at least April 13 to mitigate the effects of the **COVID-19 virus on our campus**. The health of our community is our most important priority. As a result, students in University Residence Halls are being asked to take essential belongings, academic materials, laptops, and medications with them for Spring Break and not return to residence halls following Spring Break. Residence halls are tentatively scheduled to reopen the weekend of April 10. Campus will make a final decision about reopening by April 6.

**Please carefully read all the following details:**

- All residents are expected to check out of their residence hall room by **5pm on Sunday, March 15, 2020**.
- Room keys must be brought to your community desk.
- Residence hall reopening information will be sent in follow-up communications.
- Take what you need from your room (*textbooks, notes, course materials, etc.*) before leaving campus so you can continue coursework online without returning to campus.
- You do not need to remove all personal items from your room, but take whatever you may need between now and April 13. This may include medications, perishable items, personal electronics, legal documents (e.g. passports), clothing, etc.



- You will need to prepare your room to be unoccupied during this time period. Please see the checklist below for room preparation.
- For additional details, visit the **moving & breaks page** on the Housing website.

## Exceptions

We will consider limited exceptions to allow certain undergraduate students to remain in their residence hall room with official approval from Housing. If you are unable to leave campus during this time, you must log in to **My UW Housing** and submit a *COVID-19 Accommodation Request* to remain in your room. Exceptions may include:

- If you are an international student concerned that you would not be allowed to return to UW–Madison due to visa issues.
- If you are an international student who will have difficulty returning to your home country if it has been hard-hit by COVID-19.
- If you do not have a home to go to, or if going home would be unsafe given the circumstances of your home country or home life.
- If you are unable to access reliable internet for online learning.

**Note:** if you are permitted to stay you may be required to relocate to another building on campus.

...

**“Suspension of Spring 2020 Study Abroad Programming,”  
March 11, 2020, UW Study Abroad to Students Participating  
in Study Abroad Programs**

*While those in Madison learned of the decision to move classes online, students participating in study abroad programs received an urgent notice from UW Study Abroad to return home as soon as possible. The following email provided initial answers to questions raised by an immediate departure. The notice covered topics such as arranging flights, acquiring refunds, and continuing overseas credit through virtual learning. Sections about international insurance coverage and contact information for UW–Madison’s COVID-19 resources have been omitted from the original text.*

Dear Students:

In alignment with messaging from Chancellor Blank and efforts to limit risk associated with the worldwide spread of COVID-19, UW–Madison is suspending all spring semester programming and recalling all students from overseas. Our first priority remains the well-being of our students.

You should return home as soon as possible (no later than Sunday, March 22<sup>nd</sup>, 2020). Contact your airline directly to ask about changes to your booked flights and possible fees. If you purchased a round trip flight you may be able to rebook your departure date in order to leave your program location. If you are unable to purchase a flight home at this time, we will be able to assist with purchasing the ticket and having it billed to your student account (instructions below).

We have begun working with our partners overseas on the continuation of academic credit. Some programs may be able to offer courses, for full credit, via distance learning. We are working as fast as we can on this option and will share additional information as soon as possible.

We have already notified your program provider or host institution so they are aware of your required departure and can provide additional guidance and instructions as they are able. Please update your UW–Madison MyStudy Abroad portal with your return travel plans as soon as possible. We have removed

your initial travel details and ask that you please insert your new return plans for our records.

...

## **International Students**

International students should contact International Student Services (ISS) for advising about how this will impact their U.S. visa status.

## **Refunds**

We know many of you will have questions about fees and refunds. As stated on your program cost sheet, if IAP cancels a program at a point when students can receive academic credit, no refund of the IAP Program Fee is provided. In all cases, non-IAP Program Fees are the responsibility of the student.

Our first priority now is to get students home. We will follow up with all your host institutions/providers to see if there could be any recoverable costs (such as unused housing) in the coming weeks. If there are any recoverable costs, those will be refunded to your student account.

## **Independent Travel**

You may have questions on the possibility of independent travel. Our direction remains that all students should return to your home of record, as it is in the best interest of the health and safety of our students. If you do not follow this direction, UW Study Abroad offices will not sign waivers for providers, and please be advised of the following:

*You have been asked to return to your home of record by UW–Madison due to the evolving situation of COVID-19. If you decide, independent of the university's direction, to travel to other locations not associated with, sponsored, or supported by UW–Madison, you acknowledge that you are leaving the programming oversight of UW–Madison and your host program abroad, and any implied responsibility accepted by them previously, associated with your enrollment as a student abroad. This travel is undertaken by you as an independent citizen and is not part*

## Personalizing the Pandemic

*of any continuing study online or directed study associated with your enrollment as a UW–Madison student. The university will no longer be a point of contact point [sic] for you for any travel issues encountered and is not responsible for making arrangements for your personal travel.*

...

I know that you will have many questions on a variety of issues, but our main focus now is for students to return home safely as soon as possible. We will be messaging you with additional information and updates as we are able. Please share this message with your families.

Sincerely,

UW Study Abroad

**“Additional Changes to Campus Operations,” March 17, 2020, Chancellor Rebecca Blank to UW–Madison Students, Faculty, and Staff**

*Though students hoped to eventually return to campus, Chancellor Blank sent an email on March 17, 2020 informing the UW–Madison community that classes would remain online through the end of the semester. The communication also included details on housing and essential services that would be offered through the shutdown. By mid-March, COVID-19 had already transformed daily life, and the state government’s restrictions on gatherings impacted university programming. Chancellor Blank expressed her disappointment in the situation and reassured students that the university would continue to provide updates in the email reproduced in full below.*



*This message is being translated into multiple languages.*

To our students, faculty and staff,

Our campus is continuing to monitor the rapidly changing COVID-19 pandemic, including spread of the disease and public health guidelines to mitigate its effects.

We recognize that despite the steps we have taken as a campus, there continues to be growing concern about what COVID-19 means to each of us academically, professionally and personally.

In the past day, you have likely heard new guidelines related to large events and mass gatherings. Yesterday, Governor Evers prohibited gatherings of more than 50 people in Wisconsin, and even stricter guidelines were shared by the White House.

In light of these recent announcements, we have decided to take several additional steps for the rest of the semester:

## Personalizing the Pandemic

- We will shift to alternate delivery of courses from March 23 through the end of the spring semester, including final exams. Students will receive information about instruction as plans are completed.
- In addition, we advise those who have opted to travel away from Madison for Spring Break to carefully consider whether they need to return to Madison or can continue the semester from their permanent residence.
- Students in residence halls who cannot return home or who are unable to access alternative course delivery from elsewhere may remain in the residence halls. Limited dining services will continue to be open. (Residents will be receiving a follow up message from University Housing shortly.)
- All units were asked to move all possible employees into teleworking this past Monday, March 16. Beginning March 18, campus will take steps so that the only employees (including graduate student employees) physically working on campus are those needed to deliver essential services that cannot be done via telecommuting. This will be in effect until further notice. Employees who cannot telecommute and who are not involved in essential services will be eligible to use leave.
- Essential services include public safety, academic course delivery and student support, admissions, financial aid and enrollment for new and continuing students, certain research activities and associated animal care, University Housing, communications as well as core administrative and facility services.

An employee leave policy was shared Tuesday morning, addressing employees who are not at work due to illness, self-quarantine, childcare needs, or who are employed in non-essential functions and cannot telecommute. We are providing up to 80 hours of funding for leave for these employees, in addition to existing leave policy.

We recognize this update will bring up additional questions. We will share more information that might be needed with specific communities, such as Housing residents, parents, instructors and researchers.

Should you decide to travel away from Madison in response to this update, we encourage you to make the decision that is best for your health and safety. Be sure to consider guidelines from the CDC and understand the status of the location to which you are traveling.

I share the disappointment of students and employees who were anticipating Terrace chairs, sunny days on Bascom and all of the events that make spring special at UW-Madison. This is not the semester that any of us wanted.

I especially acknowledge the disappointment of those completing their studies, whose final semester at UW has been impacted by this unprecedented situation. We will share more information on Commencement plans in the near future.

This situation continues to change rapidly, and we will continue to provide updates as soon as we have them.

## ARCHIVE

If this message raises questions about your situation that are not specifically addressed on the FAQ at [\[covid19.wisc.edu\]](https://covid19.wisc.edu) [covid19.wisc.edu](https://covid19.wisc.edu), or by a follow-up message from campus you can email back to [chancellor@wisc.edu](mailto:chancellor@wisc.edu) or call (608) 263-2400.

Please continue to take care of yourself and your family,

Chancellor Rebecca Blank



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**“COVID-19 Update: Safer at Home Order,” March 24, 2020,  
Office of the Chancellor to UW–Madison Students, Faculty,  
and Staff**

*Government restrictions only increased as the situation surrounding COVID-19 worsened. On March 24, 2020, Governor Tony Evers and the Wisconsin Department of Health Services announced a “Safer at Home” Governor’s Order. The Office of the Chancellor sent an email to university students and employees later that day to explain the order. The following passage is excerpted from the beginning of this communication and provides insight into how the university acted as a liaison between state officials and students during the pandemic.*

...

The Wisconsin Department of Health Services, at the direction of Governor Tony Evers issued a “Safer at Home” Governor’s Order today to help prevent the further spread of COVID-19 in Wisconsin. The Governor’s Order was issued due to the growing rate of infections across Wisconsin, including in Dane County. “Safer at Home” requires Wisconsin residents to stay at home and engage in social distancing; it also closes non-essential businesses and bans non-essential travel and social gatherings. The Governor’s Order also supersedes any inconsistent local orders. It will go into effect Wednesday, March 25, 2020 at 8:00 a.m. and will remain in effect until 8:00 a.m. on Friday, April 24, 2020, or until a superseding order is issued.

For your safety and the safety of the broader community, it is very important that you follow this order. This message is intended to share information about what the order means for the UW–Madison community, along with essential campus and community activities that are allowed to continue.

UW–Madison continues to maintain essential university operations, including distance learning and essential research, which is specifically permitted under the Governor’s Order. If you are expected to be on campus for these activities, you are allowed to travel.

...

**“Planning for a Safe Return to Campus,” May 18, 2020,  
Chancellor Rebecca Blank to UW–Madison Students,  
Faculty, and Staff**

*After an unprecedented spring semester at UW–Madison, the question of how to return to campus arose. Chancellor Blank sent an email to students, faculty, and staff on May 18, 2020 to assure the campus community that UW–Madison would be open for the coming fall semester. However, she expressed uncertainty about the modality of instruction and the reality of student life on campus, cautioning students about the changeability of the university’s pandemic response. The beginning and end of this email are excerpted below.*

To our students, faculty and staff,

We recently ended a very strange semester and celebrated the achievements of more than 8,500 students who received degrees as part of the Class of 2020. No one could have anticipated the incredible change and challenges presented to us by the COVID-19 pandemic and I can’t tell you enough how impressed and proud I am of our campus’ response.

As we’ve emerged from dealing with the immediate issues of this crisis, we are now looking forward. I want to tell you how we are preparing for a phased reopening over the course of the summer and what we are doing to make decisions about the fall semester.

We all want to be on campus and yearn to restart some of the in-person instruction and social interactions that make UW–Madison so wonderful; however, we are in an incredibly fluid situation with a great deal of uncertainty. Wisconsin and other states are just beginning to experiment with reopening some businesses and over the next month we will learn whether that can be done without triggering a new wave of infections. We are all still learning more about how COVID-19 is spread, and the ways to mitigate that spread. We certainly know more now than we did in mid-March when we largely closed our physical campus and we will use that knowledge as we begin to reopen.

I can also tell you that UW–Madison will be open this fall, offering a full suite of educational programming to ensure that our 45,000+ students are able to continue their education. We will certainly

make sure that our commitment to fostering a diverse and inclusive environment is as strong as ever. What I can't tell you quite yet is the mix of in-person versus online instruction that we will be able to offer.

Whatever the modality of instruction, we expect there will be thousands of students in Madison. Most of our graduate students have their permanent addresses here. And many undergraduates will choose to be in their apartments in Madison no matter how classes are delivered. The more that we can offer some face-to-face instruction in smaller discussion sections or seminar courses, the more that those students who are in Madison will benefit.

But there will be some students who want to pursue their studies and who can't be here. Some of these will be international students; some will be students with underlying health conditions that make it important that they stay in a more isolated environment. On the other hand, there are also students who must be here in order to complete the requirements for their degree. This includes students who have to do clinical, field or laboratory training. We have a group looking at these courses and how we can offer them safely.

All of this suggests that this next year we will likely be offering some hybrid mix of educational offerings. Larger lectures will almost surely be offered remotely, but we hope to offer face-to-face section meetings for students who can attend. We need to make a substantial share of the curriculum available remotely. At the same time, we should try to give as many students a small class/discussion experience as possible, whether in-person or online, to foster the learning and connections that small groups are so well-suited to provide.

In short, it won't be a normal semester next fall. And let's be clear, we're not just talking about the fall semester. As we're looking forward, we're preparing for an entire academic year where concern over COVID-19 affects our educational programming.

We can also anticipate other changes that affect student life. We are looking at all the ways we can operate residence halls and dining facilities safely. We are exploring how to offer student events in new ways, including virtually. Smaller classes would likely need to be held in larger rooms that allow greater physical

distancing, which in turn may require scheduling changes. Other events, gatherings and activities may need to be modified or reduced in size to mitigate transmission risk. And, we'll all be asked to take steps as individuals to protect our community, such as staying home if we don't feel well.

Of course, it's not just about students and classes. We will need to change the way we do business. We need to look at cleaning protocols, distances between desks in our offices, masking requirements, testing availability and many other issues. We need to keep our employees safe. For some faculty and staff who may face particular health risks, this may mean working from home for much of the next year, if that is possible.

...

We have targeted a date no later than the end of July to make a final decision on how many in-person classes we can run, in consultation with UW System and state and local health officials. I want to acknowledge the frustration that this lack of certainty causes students and parents. We're balancing everyone's desire to plan for the fall with our need to provide a safe environment for our community. We'll continue to provide updates with as much information as we are able throughout the summer months.

While we face some big challenges, so does every other college and university around the world. I believe that we are better positioned than many because we came into this on a sound financial footing, and because of the innovative and hard-working faculty and staff and the dedicated students and alumni we have at UW-Madison.

We will find a way through the many challenges presented by the COVID-19 crisis. We certainly will offer a full educational program for students next year. We will emerge from this with some new skills and knowledge that may make us a stronger institution in the long run.

And when this virus is defeated, we will all gather again on the Terrace to enjoy each other's company and celebrate our shared community.

Chancellor Rebecca Blank

**“Message from Chancellor Blank - Addressing Racial Inequities on Campus,” July 8, 2020, Chancellor Rebecca Blank to UW–Madison Students, Faculty, and Staff**

*COVID-19 was far from the only thing on people’s minds during the summer of 2020. Like several other cities across the country, Madison experienced widespread protests and increased calls for social justice following the death of George Floyd in Minneapolis, Minnesota. In an email to UW–Madison students, faculty, and staff, Chancellor Blank shared her thoughts on racial inequality and the university’s commitment to address these issues. This email is presented in full below.*



Dear students, faculty and staff,

I first heard the term White privilege in 1975, when I was part of a student group at the University of Minnesota engaged in a weekend retreat sponsored by the University YMCA. One of the 'games' we played that weekend involved negotiating with others over chips of different colors. I ended up the winner, with more gold chips at the end than anyone else. Of course, I wasn't surprised. I felt I was tougher than the other students, more determined to succeed, and negotiated harder. But then we debriefed the game and it turned out that three of us had been given a very different set of starting chips than anyone else. I hadn't been a better, tougher negotiator, I just had an unequal head start.

I've never forgotten that game. For many years, I taught classes on income inequality and the role of inherited wealth in shaping economic and social outcomes. In class discussions of discrimination, I frequently drew on my own experiences as a woman in a highly male-oriented field of study. I know what microaggressions can feel like and how tired you can get of being dismissed and ignored.

Almost all of us have experiences where we feel bullied, excluded or ignored. But for most of us who are White, these are not constant experiences that permeate all aspects of our lives. I

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have never feared for my life when I see police approaching; I am not trailed in stores or treated with suspicion by TSA or other security personnel.

The past seven weeks have seen an outpouring of millions of voices demanding justice and equity for Americans who are Black, Indigenous and people of color (BIPOC). Our university has been one focus of those demands. It is incumbent upon all of us to re-examine our commitments to racial justice and marshal the energy and resources to do more and better.

As someone who has benefitted from White privilege, my first action must be to listen with humility and empathy – to faculty and staff, to students, and to others who love UW and also recognize its shortcomings. Although the Black Lives Matter movement was the catalyst, these conversations touched on many issues and identities – Asian and Asian-American, Latinx, LGBTQ+, Native American and people with disabilities.

These conversations reinforced the need for more work inside our campus community. These are not issues that we have ignored in recent years. Our fall Diversity Forums have grown every year with attendance from across campus; this year Robin DiAngelo, author of "White Fragility," will deliver the keynote address. We have successfully recruited 30 new faculty through the Target of Opportunity Program (TOP), which provides incentives for departments to hire persons from groups under-represented in their discipline and department. This has included people of color as well as women in male-dominated science fields. We've developed programs for incoming students in identity and implicit bias, aimed at both undergrads and graduate students. If you want to know more about what we have been doing over the past five years to increase diversity and inclusion at UW, I encourage you to read this report.

But this is not enough. Our Black students, faculty and staff have consistently shared the discomfort they experience negotiating spaces on campus that are defined by White culture, and about the regular stream of microaggressions they experience – comments and behaviors that show misunderstanding (at best) and hostility and disrespect (at worst).

Today I'm sharing with you a number of additional commitments we are making in our efforts to ensure that our university welcomes and fosters the success of all members of our community. A number of these commitments require financial support and we are in extremely difficult financial circumstances right now due to the COVID-19 pandemic. Doing some of the things listed below will require cutting other programs. But it is important that we find these funds.

**Enrollment and Recruitment.** We must continue efforts to increase the diversity of campus by expanding enrollment and employment among underrepresented groups. We will do so by:

- Developing a fundraising initiative with the goal of raising at least \$10 million in new private gifts, working in partnership with the Wisconsin Foundation and Alumni Association. We will use these funds to recruit a more diverse group of students, faculty and staff, and to build a campus culture that welcomes and retains all groups, particularly people of color.



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- Continuing to invest in the TOP program, which has a proven record of success in attracting highly talented faculty who greatly enhance the quality and diversity of an academic department. Departments in 10 schools and colleges have utilized this program in the past two years. We need to keep this momentum going and expect to recruit additional faculty of color.

- Ensuring that all schools/colleges require search committees to complete training on implicit bias and recruiting for excellence and diversity. Many faculty searches already use the "Searching for Excellence & Diversity" workshops from the Women in Science & Engineering Leadership Institute (WISELI); others have developed localized expertise. The goal is to ensure that search committee members are better able to recognize how stereotypes prevalent in our society can influence our evaluations of and behavior toward others, even without our awareness or intent. Research has shown the effectiveness of the WISELI workshops.

**Campus History.** Understanding our past is important to changing our future.

- Two years ago, I committed \$1 million to a public history project, designed to explore the experiences of more marginalized groups on campus, focusing on particular events or time periods. A central part of this project involves confronting and discussing the history of racism and other forms of exclusion/marginalization on campus. A year ago, we hired a project director. While the closure of the University Archives due to the pandemic has slowed the work, it is proceeding and information is being made publicly available. I will periodically use my social media accounts to highlight the uncomfortable truths of the university's past, and work with this project to make sure that its results are publicly available, both through physical as well as virtual displays.

**Education, Training and Student Support.** We are an educational institution and it is important to engage our campus community, particularly our White community members, in learning experiences that build self-reflection about how we are all shaped by racial inequities and systemic racism in our society. This self-reflection should, if it is to have an impact, lead to changes in behavior and structure. To help us in these efforts we will:

- Make mandatory the Our Wisconsin training program for all new entering undergraduate students starting this fall. Similar to trainings that are already required on alcohol safety and sexual violence prevention, it is critical that we provide students with an understanding about culture, identity, and difference, as well as the skills and commitment to create a community that is inclusive of all people.

- Create a new Office of Inclusive Education within Student Affairs. This new office, which will work closely with the Center for Leadership and Involvement and other campus partners, will develop programming to increase our capacity to educate students around issues related to race, marginalization, identity and inclusion. Incoming leaders in student organizations will be one target group for this training. Creation of the new office comes out of conversations with diverse student leaders including the Student Inclusion Coalition, Wisconsin Black Student



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Union, and others who have shared their experiences and helped us develop strategies to improve the campus climate for BIPOC.

- Strengthen training opportunities for all graduate students, graduate programs and the research and service centers overseen by the Office of the Vice Chancellor for Research and Graduate Education. These professional development experiences will build on the work of the Office of Diversity, Inclusion and Funding in the Graduate School to address the specific challenges and needs of graduate students who function as both employees and students.

- Implement an Exceptional Service Support Award. Underrepresented faculty spend a great deal of time and energy supporting students outside the classroom. For instance, right now our Black faculty are disproportionately called upon by Black students who turn to them for mentoring, advice, and support as they deal with recent traumatic events. This puts an added burden on these faculty, reducing the time they have available to advance their own research and careers. Following a successful pilot program this past year, department chairs or mentors may nominate faculty to receive an Exceptional Service Award, which provides release time from teaching for those who have provided exceptional service.

**Research.** One of our fundamental missions is to advance research on key issues. We have a long tradition at UW of supporting faculty and researchers who work on social inequities. To name only a few, we have prominent historians, education specialists, sociologists, public health researchers, social work and public policy scholars who have national reputations in studying racial inequities. To further support this work:

- The Office of the Vice Chancellor for Research and Graduate Education will provide \$1 million in research funding in the next academic year to support faculty and PIs whose research helps us understand race in America, including the public health impacts of racism, systems which perpetuate racial inequality and the physical and social impacts of racism. Particular preference will be given to scholars who have new projects that require seed funding to make a project more competitive for outside funding; creative projects that involve interdisciplinary teams; and projects with the potential to generate real-world implications for combatting racism and its adverse effects.

- We will recognize excellence in the full range of scholarly activities. This past spring each Divisional Committee added new language to tenure guidelines that recognizes the importance of community engaged scholarship and scholarly activities in support of diversity, equity, and inclusion as noteworthy endeavors to be considered as part of tenure and promotion. These additions will help us remain a great university and underscore just how significant it is when our faculty establish meaningful engagement with these areas as part of their contribution to the campus community.

**Policing.** We want our campus police to be a national model for how campus police departments should train and perform. The University of Wisconsin Police Department recently shared how its practices and policies meet the guidelines laid out in Campaign Zero's #8Can'tWait project. In addition, over the course of the next academic year UWPD will implement its Racial Equity Initiative — a comprehensive action plan for identifying, adopting

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and continually assessing needed changes within the department in the short-and-long-term. A core part of this plan will be to specifically ensure the department demonstrates its commitment to racial justice in policing in ways that are meaningful to members of our community, particularly those from marginalized groups.

The efforts outlined above mark an important next step in our ongoing work to confront racism and advance equity and justice. We have a moment of opportunity on campus right now. I believe that more of our faculty, staff and students – particularly those who are NOT from marginalized communities – understand the need to engage in these efforts. We need to take advantage of this opportunity. This is not something that our underrepresented communities can or should be burdened with; it is on all of us to listen, read, reflect and work towards change.

We are working on some further actions, including more extensive training and professional development opportunities for our faculty and staff to engage in conversations about these issues. We expect to announce these efforts in the coming months.

Finally, I have to note that change can be slow. This is particularly true when we are talking about deep change in the ways people see the world or in the ways that institutions operate.

Change is made even more difficult by the fact that our community is constantly being recreated. Each year about 10,000 of our students leave and another 10,000 new students arrive. Hence there are always large numbers of new people arriving on campus and we must engage with them afresh. All of this means our work will never be complete. We have to marshal the will and the persistence to embed these efforts into the fabric of the institution.

Thank you to everyone for the various ways in which you are engaged in creating a campus that is welcoming, diverse, inclusive, and anti-racist. I pledge to increase our efforts to make the changes needed at our university. I hope you will join me.

Chancellor Rebecca Blank



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**“UW–Madison Will Shift to Two Weeks of Remote Instruction, Quarantine Two Residence Halls,” September 9, 2020, Chancellor Rebecca Blank to UW–Madison Community**

*Following a tentatively optimistic opening in the fall of 2020, the COVID-19 situation at UW–Madison quickly became problematic. Positive cases among students rose so dramatically in the first few weeks of the semester that the university administration decided to enact substantial changes to the initial reopening plans. On September 9, 2020, Chancellor Blank sent an email to students to announce these changes amid growing criticism from Dane County. A major part of the administrative response was to quarantine Sellery and Witte Residence Halls for two weeks to prevent further spread of COVID-19 among the student population. In addition, nearly every campus facility was closed, and in-person classes were moved online for two weeks. Chancellor Blank expressed concern for the situation and urged students to abide by state, local, and university guidelines in accordance with safety protocols. This email is reproduced in full below.*



*This message is being translated into multiple languages. More information will be posted here.*

To our UW-Madison community,

UW-Madison has taken extraordinary measures to prioritize the health and safety of our students, faculty, and staff while facilitating some form of in-person activity this fall. We partnered with public health experts to develop a method of testing, isolating and managing COVID-19.

As the number of positive test results has increased during the last two weeks, we have taken several additional actions. On Monday we restricted undergraduates to essential activities only. We worked with public health authorities to support the quarantine of students living in many fraternity and sorority houses and we mandated testing for live-in members of all fraternity and sorority chapters.

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Unfortunately, our positive test rate among students continues to rise far too rapidly. It has been 20 percent or greater for the past two days. As we saw at the end of last week, these numbers reflect a rapid rise in infection among students living off campus, but the latest numbers also show a sharp increase in certain residence halls. We will not contain this spread without significant additional action. In consultation with UW System Administration, Public Health Madison & Dane County and Governor Evers, we are taking the following actions:

- All in-person undergraduate, graduate and professional school group instruction will be paused from Sept. 10 – 25. These classes will be cancelled Thursday, Sept. 10 – Saturday, Sept. 12 and will resume remotely beginning Monday, Sept. 14 for at least two weeks. Clinical training will be permitted to continue. Classes and sections that are currently being offered remotely will continue as scheduled. Our contact tracing has not revealed any evidence of transmission from in-person instruction; however, this decision comes out of an abundance of caution for our students and employees. The Office of the Provost will provide assistance, if needed, to faculty and instructional staff making this quick transition to remote learning.
- Undergraduate research experiences that can be accomplished remotely must be conducted that way starting September 10 and continuing until September 25. The suspension of undergraduate students participating in face-to-face human subject research interactions, on and off campus, remains in effect until September 25. Graduate and post-doctoral research activities will be permitted to continue.
- Given the high number of positive test results in Sellery and Witte Residence Halls, we have directed all residents in these buildings to quarantine in place for the next two weeks effective at 10 p.m. this evening. All residents of these halls who have not already been tested this week will be required to test on Thursday and Friday. University Health Services (UHS) will conduct these tests on-site.
- Students are NOT being asked to move out of the residence halls or leave town. We have significant additional quarantine space available if necessary.
- Appointments continue to be available for on-campus testing; we are also working to further expand testing capacity.

In addition, the following changes will be made to our campus operations, effective Sept. 10 – 25:

- All in-person study spaces, including those at University Libraries, the Wisconsin Union and academic buildings will be closed.
- Dining services will shift to carry-out only for Housing residents and staff. The Wisconsin Union will provide curbside food pickup only.

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- University Recreation & Wellbeing facilities will be closed.
- University Health Services will only be open for urgent care needs, by appointment only. Telehealth and telemedicine appointments are available.
- University Libraries will revert to their summertime operations, supporting the research mission of the university.
- In-person gatherings, including all social events and work gatherings of more than 10 people, are cancelled. Employees may meet in groups of 10 or fewer for essential purposes. Whenever possible, work meetings should continue to be conducted remotely via phone or video streaming.

On-site essential operations will continue, as they have done throughout this pandemic. Employees working remotely should continue to do so. Supervisors should be flexible with employees who have returned to work on campus in non-essential functions.

I am thankful for the employees who continue to work on-site and keep our campus running. No changes will be made to Madison Metro bus schedules or campus parking operations at this time. Facility access and mail and package delivery will remain the same. Child care centers will remain open at this time.

These measures follow the precedent set by several other universities that have paused in-person instruction for two weeks in an effort to reduce the spread of COVID-19. We will continue to consult with UW System and our Board of Regents as we evaluate the situation and share more information about the rest of the semester. We remain committed to communicating our evolving plans as quickly and transparently as possible.

CDC guidance suggests that students should not travel home during this two-week period. This is to protect you, your family, and the community. If you can stay where you are, that is the safest course. If you do choose to travel, please follow these guidelines from University Health Services.

I share the disappointment and frustration of students and employees who had hoped we might enjoy these first few weeks of the academic year together. Before we started this semester, we knew that no plan would be risk-free in the current environment.

To those of you who have been following our campus-wide health protocols, I thank you for your awareness and dedication to protecting our UW-Madison community. Please continue to take steps to prevent the spread of COVID-19: monitor your symptoms daily, use a face covering, practice physical distancing, and limit gatherings. To those of you who have not yet taken these protocols seriously, I urge you to consider the consequences of your actions. Your behavior matters, and it has the potential to impact more than just your immediate circles as we are seeing with the recent growth in positive cases.

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We care about your safety and well-being. Please take care of yourself and others during this time. If you have questions, email [smartrestart@vc.wisc.edu](mailto:smartrestart@vc.wisc.edu).

Chancellor Rebecca Blank



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**“COVID-19 Clarifications and Reminders,” September 18, 2020, Dean of Students Christina Olstad to UW–Madison Students**

*Confusion spread across campus after the university announced its decision to temporarily suspend in-person classes on September 9, 2020 due to rising positive cases. In-person instruction was scheduled to resume on September 25. In the middle of this two-week suspension, Dean of Students Christina Olstad emailed students to clarify the situation and remind them of infraction policies. The following two passages excerpted from this email also addressed a particularly troubling rumor about contracting COVID-19.*

...

Positive COVID-19 cases among students appear to be trending down, but the risk remains high. Dane County has recently seen a dramatic increase in positive cases. The University continues to evaluate the data and will make more decisions about campus operations next week. A lot will depend on how things go these next several days. The most important thing you can do to keep our positive numbers down is to physically distance from people other than your roommates or immediate family and to always wear a face covering.

...

I also want to address a concerning belief we’ve been hearing – intentionally contracting COVID to “get it over with” is unsafe and irresponsible. While students who test positive can be asymptomatic or experience minimal symptoms, we’ve seen otherwise healthy young people across the country, including here in Dane County be hospitalized. The long-term effects of COVID-19 are still largely unknown. Willfully spreading the virus places everyone you meet, particularly our more vulnerable family and community members, at higher risk.

As of today, the University has completed or is currently investigating nearly 450 students and 9 student organizations for public health violations. Of these, 14 students were referred for emergency suspension. If a student repeatedly or intentionally violates the University’s public health expectations, there are real consequences that could affect their academic future.



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We've overwhelmingly heard that students want an in-person experience as much as safely possible, and we are working around the clock to make this possible for you. The best part of my work is being among students, and I'm missing that interaction as much as you are this year. We are doing all we can to give you a world-class education both inside and outside the classroom, in circumstances that are new and unsettling to all of us.

...

**“New Safety Measures for Spring Semester,” December 11, 2020, Chancellor Rebecca Blank to UW–Madison Students**

*After a tumultuous semester of COVID-19 that impacted learning, working, and programming, the university modified staff and student testing requirements. This email, sent by Chancellor Blank on December 11, 2020, informed students of the new requirements awaiting them in the spring. The plan for mandatory COVID-19 testing, every seventy-two hours, of all students living on or near campus was undoubtedly the most significant change. The new Safer Badgers mobile application was created to keep track of test results. It alerted building entrance supervisors to anyone who had either gone untested or recently tested positive. In the email reproduced below, Chancellor Blank outlined the new testing process and the repercussions of not abiding by these procedures.*



***This message from Chancellor Rebecca Blank covers:***

- ***Mandatory testing for all undergraduates in the greater Madison area starting in January***
- ***A new app, Safer Badgers, that will be your key to campus***
- ***Activity restrictions and testing process for returning to Madison after winter break***

Dear students,

As the fall semester nears its end, I want to thank all of you for the flexibility, understanding and resilience you've shown as we've negotiated the upheaval and uncertainty caused by COVID-19. The many challenges we've overcome together have made us a stronger, more caring community.

Looking ahead, the vaccine news is very encouraging. Yet we know the pandemic is far from over — the last few weeks alone show its devastating toll in hospitalizations and deaths across the country. With that in mind, we have been working on additional testing protocols to enhance the safety of the campus community during the spring semester.

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The new measures, which increase the scope and frequency of testing, are an expectation for all students and represent a significant change from the fall semester. Proof of recent negative test results will be needed in order to access campus facilities and services.

### **Required testing, more often**

Research has shown that people may become infected and spread COVID-19 to others without knowing it. As previously announced, we are partnering with Shield T3, a subsidiary of the University of Illinois System, to provide accurate and rapid saliva-based PCR testing beginning in January.

**During the spring semester, all undergraduate students living in the greater Madison area will be tested twice weekly.** We will have multiple testing sites on campus that you can use.

**Participation in twice-a-week testing is mandatory, regardless of whether you are coming to campus for instruction or to use campus facilities.**

You will need to remain up to date with your testing in order to access campus buildings in the spring. We anticipate having testing available 7 days a week, including early morning and late night hours, at sites throughout campus.

Expanded testing will identify more people who are infected and enable them to take precautions immediately to protect themselves, their friends and families, and the broader community.

### **Safer Badgers app**

You will use a mobile app called Safer Badgers to find testing locations, schedule tests, quickly obtain test results, and access additional health resources. The app will be available for download by mid-January. A campus loan program will provide limited-use smartphones to those who need them.

One screen of the Safer Badgers app, called the Badger Badge, will serve as a virtual access pass for entry into buildings where in-person classes and other in-person activities are being held.

The screen will not show any private health information – it will simply show whether you are up to date on your testing. You'll need to show your Badger Badge upon request to trained employees who will monitor access to buildings and campus services. The Safer Badgers website will also allow individuals without smartphones to print a copy of their building access status.

The app will help you qualify for incentives to thank you for participating in the new testing program and help you avoid any negative consequences triggered by being out of compliance.

The app also provides anonymous, secure notifications to anyone who has been in proximity to another participating app user who has tested positive for COVID-19. Proximity is initially set as 2 hours within about 6 to 10 feet.

By expanding testing and linking campus access to this testing, we will put additional strong curbs on the spread of the disease. However, expanded testing, while powerful, can get us only so far. We need everyone in our campus community to continue following other health protocols: Wear a face covering, maintain physical distance, avoid gatherings with people you don't live with, and wash your hands often.

### **Returning in January – activity restrictions and testing**

Students will be returning from all over the country, including many areas likely to be experiencing high infection rates. To prevent a spike in cases at the start of semester it's especially important that students returning to Madison take precautions before, during and after their return. We recommend that you test before you travel if possible, limit your out-of-home activities as much as possible for 10 days before you travel, and postpone your travel if you test positive or have symptoms of COVID-19.

**All returning students should restrict their movement to essential activities until they've complete two negative on-campus tests.** This means:

- Stay in your room/residence as much as possible
- Take part only in required academic and work activities
- Stay away from bars, restaurants and gatherings with people other than your roommates/housemates

Because students arrive back in Madison at different times, campus operations and programming will be limited for the first week of the semester to allow time for everyone to comply with the testing program. After that, operations and programming will be expanded.

• **Students living in residence halls:** Move-in will begin on Jan. 20 through a sign-up process. **You will be required to test upon arrival.** If possible, roommates should schedule their arrivals to avoid arriving on the same day.

**Once you've arrived, you will test twice a week; two negative on-campus tests will be required by Jan. 31.** University Housing will send out more information in early January.

• **Students living off-campus:** You should plan to complete two on-campus tests, at least three days apart, between Jan. 14 and Jan. 24. At minimum, you must have one on-campus test before the start of classes Jan. 25.

**Beginning Jan. 25, you will be required to test twice a week. Two negative on-campus tests will be required by Jan. 31.**

You will need to continue to test twice weekly throughout the semester to remain in compliance with campus requirements.

## Personalizing the Pandemic

### Watch for more information

As we go into winter break, multiple teams across campus are working to prepare these enhanced measures for the spring semester. **In the weeks ahead, we will be sharing many more details with you via email and a new section of the COVID-19 Response website.** In fact, we likely will need to communicate with you a little more than usual over the winter break because of these new measures. Please keep an eye out for this information, which will be important as you plan for spring semester.

Thank you in advance for your attention to these messages and for your continued patience and understanding.

Rebecca Blank  
Chancellor, University of Wisconsin–Madison



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## **Safer Badgers Mobile Application**

*While UW–Madison offered optional COVID-19 testing for off-campus students during the Fall 2020 semester, this testing was expanded for the Spring 2021 semester. Students were required to test every seventy-two hours, and non-compliance was met with administrative consequences.*

*The Safer Badgers mobile application was at the center of the university's initiative to test all students, staff, and faculty at regular intervals. Though the app received mixed reviews, it effectively tracked testing compliance and test results for both the user and the university. Each user was provided a QR code on the app's homepage that was scanned upon completing a COVID-19 test. The QR code was linked to the user, and an individual's test result was uploaded to their account within twenty-four hours.*

*The Safer Badgers app also monitored student movement in campus buildings, using the app's Badger Badge to indicate the compliance status of each student. When green, indicating a recent negative test result, the Badger Badge allowed a student to enter a campus building after being checked by building monitors. If the badge was yellow or red, indicating no recent COVID-19 test on record or a recent positive test, building access was denied. With the Safer Badgers app, the university hoped to closely monitor and trace COVID-19 cases among the larger university community in order to keep campus safe.*

*All of the following photos come from the mobile application Safer Badgers (© University of Wisconsin), developed by ROKMETRO, Inc., and are published with the permission of the University of Wisconsin.*

## Icon for Safer Badgers Mobile Application



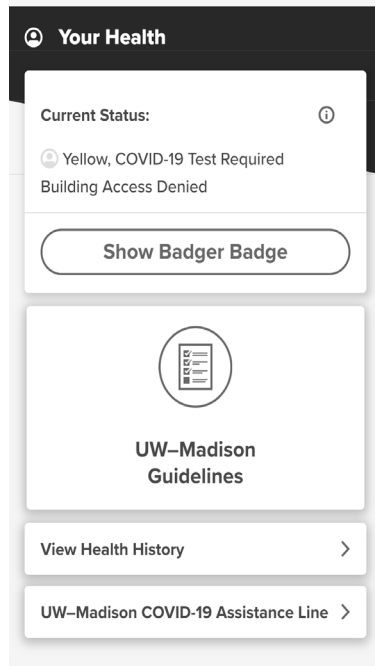
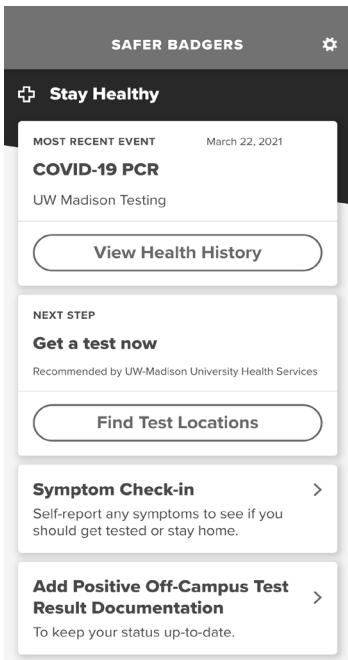
## Initial Loading Screen for Safer Badgers Mobile Application






## Top and Bottom of the Safer Badgers Homepage


*The homepage contained links to the health history page (where students viewed their COVID-19 test results and history), the testing locations page, several administrative page links, UW–Madison’s COVID-19 guidelines, and a link to the Badger Badge. The Badger Badge showed a student’s name, photo, and unique QR code that was used to enter buildings and testing sites. The Badger Badge switched between red, yellow, and green based on test frequency and results.*





## Testing Locations Page for Safer Badgers Mobile Application



*This page contained the locations, hours, and wait times for all walk-in UW–Madison COVID-19 PCR testing sites.*

 **Test Locations**


**21 N Park St, Room 1106** 


 21 N Park St, Madison, WI


 Short wait time



 **Open until 03:30pm** 


**Notes:** Site closed M-F 11:30a-12:30p. Last patient accepted 15 minutes prior to scheduled closing times.


**Carson Gulley Center, Room 205** 


 1515 Tripp Cr, Madison, WI


 Short wait time

 **Open until 04:30pm** 

**Notes:**  This testing site closed starting April 2, 2021. Site closed 12:30p to 1:30p. Last patient accepted 15 minutes prior to scheduled closing times.

**Dejope Hall, Lake Mendota Room 1165** 

 640 Elm Dr, Madison, WI

 Short wait time

**“Vaccination FAQs, Testing Site Changes, Travel Updates,”  
March 24, 2021, Office of the Chancellor to UW–Madison  
Undergraduates**

*As the spring semester of 2021 wore on, the distribution of COVID-19 vaccines increased across the country. UW–Madison University Health Services dispensed a limited number of doses to eligible students, faculty, and staff. To allay confusion, the Office of the Chancellor emailed undergraduates with answers to frequently asked questions regarding vaccinations. What follows is a series of excerpts from this communication that addressed appointments, eligibility, cost, and recordkeeping alongside updates on university-sponsored travel. Sections about insurance, appointment locations, testing sites, and vaccine registration have been omitted.*

**Vaccination FAQ**

Effective Monday, more students and employees became eligible for vaccination under state guidelines. Adding to the groups already able to make vaccine appointments throughout the state are people with certain medical conditions that increase their risks of severe illness from COVID-19.

So far, UHS has not received enough vaccine each week to vaccinate every eligible employee and student. This week, for example, UHS received just 600 first doses of vaccine. **For that reason, UW–Madison encourages all eligible employees and students interested in vaccination to seek appointments both on and off campus.**

...

*I'm eligible – why can't I get an appointment right away?*  
Although vaccine supplies are improving, they remain limited – please be patient. Some providers may be able to start vaccinating your eligibility category earlier than others. Everyone will eventually have the opportunity to get vaccinated. **You can register with the Wisconsin Department of Health Services (DHS) to be offered an appointment off campus when one is available.**

## Personalizing the Pandemic

*Is there a charge to be vaccinated?*

No, the vaccine is free and any offers to get the vaccine will come from known sources such as your local or tribal health department, health care provider, pharmacy, or a community-based clinic. You should not accept offers for vaccine from an unknown source as these are likely fraud.

...

*Does citizenship status affect where I can be vaccinated?*

No, President Joe Biden has stated that all people in the U.S. – regardless of their immigration status – can access the vaccine. The U.S. Department of Homeland Security also supports vaccine access for undocumented immigrants. Wisconsin vaccinators may not require proof of residency or state identification to get the vaccine. If you are part of a group that is currently eligible, you can get the vaccine.

*If I get vaccinated off campus, how do I let UHS know?*

**Sharing your vaccination record with UHS allows you to be excused from routine COVID testing and your Badger Badge to remain green/building access granted.**

...

*How do I get my official vaccination record so I can provide proof of vaccination for travel?*

You will receive a vaccination card at your appointment. Your vaccination card has information on when and where you received your vaccine as well as other helpful information related to the COVID-19 vaccine such as the type that you received. Keep your card in a safe place. You may also visit the Wisconsin Immunization Registry for an electronic version. When taking pictures or posting selfies about getting your COVID-19 vaccine, do not post photos of your vaccination card online. Doing so could reveal your personal health information.

...

### Travel updates

- Changes have been made to UW–Madison sponsored travel for employees, graduate students, and undergraduates participating in in-person research or instructional field

activities as well as registered student organizations (RSOs). For employees, graduate students, and undergraduates participating in in-person research or instructional field activities, the key change is that single day trips using ground transportation outside of Wisconsin do not require prior approval. For RSOs, travel overnight or outside Dane County now requires prior approval from the Center for Leadership & Involvement.

- A reminder that **the Centers for Disease Control and Prevention continues to recommend against travel**; if you must travel, learn how to reduce your risk.

...

# What the Students Wrote

*University of Wisconsin–Madison Student Newspaper Articles\**

## **“In-Person Classes Canceled for Remainder of Semester: UW–Madison Adds to Growing List of Restrictions,” March 17, 2020, Michael Parsky<sup>1</sup>**

*As public health and safety rapidly deteriorated in March 2020, the campus community adapted to new ways of learning, working, and socializing. On the same day that Chancellor Blank announced the suspension of in-person classes for Spring 2020, Daily Cardinal author Michael Parsky published an article for the newspaper’s website. The following article discussed just how drastically life had changed after March 17 with the implementation of university, local, and state restrictions. Not only would there be a complete transition to online classes for students, but all public gatherings would be restricted.*

Less than a week after UW–Madison decided to move all classes online until April 10 to contain the spread of COVID-19, the university extended its original edict Tuesday through the remainder of the semester.

Chancellor Rebecca Blank sent out a new set of guidelines in an email implementing additional measures the university would undertake to contain the spread of the virus, of which 72 cases in Wisconsin have been confirmed, according to the state’s Department of Health Services.

Nineteen people have tested positive for the novel coronavirus in Dane County as of Tuesday, including one UW–Madison faculty member in the School of Veterinary Medicine.

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\*The following articles were accessed through the *Daily Cardinal’s* website at the time of this journal’s publication. Owing to the current conventions of many online newspapers, each author used hyperlinks to cite the information and quotations that appear in their piece. To see the articles in their original online format, with their original hyperlinks, readers can visit the *Daily Cardinal’s* website or the URLs provided at the end of this section.

"I share the disappointment of students and employees who were anticipating [Memorial Union] Terrace chairs, sunny days on Bascom [Hill] and all of the events that make spring special at UW–Madison," Blank wrote. "This is not the semester that any of us wanted."

In addition to canceling face-to-face instruction for the rest of the semester, the university also advised all students who traveled for Spring Break to exercise caution of whether they need to return to Madison to continue their studies or if they could work remotely from their permanent residences.

UW–Madison also said it would allow students in residence halls who cannot return to their homes or access alternate delivery of classes to remain, but noted dining hall services would be limited.

After the university asked for all possible employees to shift to teleworking capacity Monday, UW–Madison said it would take steps to ensure all faculty and staff — including graduate students — who are physically working on campus to move online [*sic*], except for essential services.

Non-essential staff and employees unable to telecommunicate due to self-quarantine, illness or childcare may receive up to 80 hours of additional funding in an update leave policy sent out by the university.

For those set to graduate in May, Blank noted UW–Madison would provide updates regarding graduation ceremonies.

"I especially acknowledge the disappointment of those completing their studies, whose final semester at UW has been impacted by this unprecedented situation," Blank said. "We will share more information on Commencement plans in the near future."

In a separate email, Interim Dean of the College of Letters and Science Eric Wilcots said students would receive "specific information" from their L&S instructors by Friday related to their courses.

"We are committed to providing you excellent educational opportunities in the next weeks and beyond, and to supporting



you with the resources you need to best complete this semester,” Wilcots wrote. “Priority #1 is the health and well-being of our entire community. Be sure to take care of yourself and those around you.”

According to Wilcots’ email, students should expect to participate in online lectures and discussions at the same time their in-person classes would normally take place.

While students will receive similar assignments and cover the same course material, Wilcots’ email acknowledged students and staff may need to learn new technological platforms and could experience technical difficulties in communicating with one another.

UW–Madison’s decision came on the heels of an order executed by Gov. Tony Evers to close malls, bars, restaurants, churches, theaters arenas and fitness centers among others and limit social gatherings of 10 people or more.

The order — implemented immediately, beginning at 5 p.m. Tuesday — came following the spread of the virus in Milwaukee, Dane and Kenosha counties. More stringent policies were needed, according to Health Services Secretary Andrea Palm.

“We know this will disrupt your lives,” Palm told reporters. “Now is the time to make a plan to stay home.”

The state’s decision expanded on earlier mandates to limit group interactions to less than 50 people and allow bars and restaurants to stay open if they kept their occupancies to a small capacity.

As of now, eating establishments can still operate but can only offer take-out orders. Owners who violate the order could face a \$250 fine and 30 days in jail, according to Ryan Nilsestuen, Evers’ chief council.

Exemptions from the restrictions include airports, gas stations, grocery stores, jails, courts, government agencies, hospitals and clinics and polling places.

The legislature will remain exempt as well. Legislators could meet virtually for the first time as a state statute grants them the opportunity to do so. But it has never been done before, according to the Milwaukee Journal Sentinel.

Evers also announced all public and private schools would be closed past an earlier April deadline, similar to UW–Madison’s.

He also plans to enforce an emergency order set to be issued Wednesday, enabling unemployed individuals to immediately receive unemployment benefits instead of having to wait a week to access them.

“Democracy has to continue,” Evers said. “You take some chances in life but this [*sic*] one where I believe that if indeed we deem there is a necessity to meet, we will meet and do the work of the people of Wisconsin.”

UW–Madison will continue to provide more information as future measures are taken across the state — and nation.

“The situation continues to change rapidly, and we will continue to provide updates as soon as we have them,” Blank said.

**[Editor’s Note: 3/18/2020, 12:30 p.m.]** An earlier version of this story included language regarding Gov. Tony Ever’s order to close schools that the Governor’s Office has since been revised [*sic*].

**“Spread of COVID-19 Prompts UW–Madison to Postpone Spring Commencement,” March 23, 2020, Michael Parsky<sup>2</sup>**

*By the end of March, the COVID-19 crisis inevitably prevented the possibility of an in-person commencement at UW–Madison. The following article, written by Daily Cardinal author Michael Parsky on March 23, 2020 for the newspaper’s website, explained the decision to cancel the university-wide and departmental commencement ceremonies for Spring 2020. Furthermore, seniors were told they would not be allowed to take graduation photos on campus. Parsky quoted Chancellor Blank throughout the article as she expressed her sorrow at the announcement and reassured students that they would graduate on time.*

After holding out as long as possible, UW–Madison announced Monday that it would postpone its spring commencement ceremonies due to rising concerns related to the COVID-19 virus.

Chancellor Rebecca Blank sent an email and spoke in a recorded video message to inform UW community members of the university’s decision. In addition to commencement events held at Camp Randall and the Kohl Center, Blank also noted that individual graduation ceremonies hosted by UW schools, colleges, departments and campus organizations would not occur.

“Commencement is the best event of the year at UW, and I am deeply sorry about this decision,” Blank said in the video. “For the class of 2020, this is a painful loss. You should have a chance to celebrate with your teachers, friends and family, and that will not happen this May.”

In collaboration with the senior class officers, however, Blank said a virtual commencement ceremony would take place May 8.

A tribute video dedicated to the class of 2020 will headline the processions. Student’s degrees will be conferred in the video and Blank hoped that keynote speaker James Patterson and alumni speaker John Felder would provide remarks, according to her email.

Once it becomes safe for large numbers of people to congregate together, Blank said the university and senior class officers would

create an in-person event at a later date to honor those who graduated.

“The coronavirus pandemic has changed many things. But it doesn’t change the exceptional achievements of the Class of 2020,” Blank wrote. “You are Rhodes Scholar finalists, national champion athletes, inventors, entrepreneurs and dedicated students with the skills and passion to lead our nation and our world to a better place.”

Blank promised that all outgoing students will graduate on time and receive their diploma, as long as they meet their degree requirements.

In another email sent by the university, students should still apply to graduate and complete their applications by April 3 to be included in the commencement ceremony program.

The Senior Class Office will continue with its fundraising efforts with the Green Bandana Project — organized by the National Alliance on Mental Illness-UW — as the Class of 2020’s Senior Class Gift, the email said.

Additionally, students may receive their cap and gowns for commemorative pictures, but they will be unable to take pictures at Camp Randall or the Abraham Lincoln statue on top of Bascom Hill.

The email also said graduating students could participate in future ceremonies, such as the Winter 2020 or Spring 2021 commencements.

In the face of unprecedented circumstances, Blank praised the UW community for confronting “fear and uncertainty with grace, resilience and compassion,” and for supporting one another.

“That’s what being a Badger is all about,” Blank said. “Together we will get through this — and yes — we will celebrate. The Class of 2020 deserves nothing less.”

More information and updates regarding commencement can be found on its website.

**“UW System Announces Housing Refund Due to COVID-19,”  
March 30, 2020, Aylin Merve Arikan<sup>3</sup>**

*After asking students to move out of their university housing accommodations in mid-March, UW–Madison decided to compensate residents with a housing refund. Daily Cardinal author Aylin Merve Arikan discussed this decision in an article published on March 30, 2020 for the newspaper’s website. This commitment came with a major financial loss, but UW–Madison was not alone in its struggle. Even with significant stimulus packages from the federal government and financial aid from state governments, universities across the country struggled to pay back their students for terminated housing contracts.*

The University of Wisconsin System announced on March 19 it will be giving back nearly \$80 million to students who vacated their on-campus residencies early due to the rapid spread of COVID-19.

The university ordered students living in the dorms to move out earlier in March following the announcement classes would be moved online. UW–Madison has suspended access to dorms for all residents except those who have special permission to stay — like students who are unable to return to their permanent residences.

“We recognize the tremendous upheaval this pandemic has inflicted on the lives of our students,” Cross said. “This reimbursement is the right thing to do.”

Last week, UW–Madison’s University Health Services received reports of students returning from Spring Break who had tested positive for COVID-19. And while many universities only allow students to continue living in residence halls with special approval, UW–Madison has encouraged all who can to return to their permanent residences. Wisconsin also has implemented a “safer at home” order, instructing Wisconsinites to remain in their homes and forcing all nonessential businesses to close.

Amidst the state and national shutdowns, universities are still in the process of calculating the exact amount of refunds for students.

Each university will be creating their own disbursement process, UW System spokesman Mark Pitsch told the Milwaukee Journal

Sentinel. UW–Madison announced refunds will be in the form of credit, meaning the funds will first be used to pay off any outstanding balance — the rest will be returned to the student.

UW–Oshkosh Chancellor Andrew Leavitt said his campus was considering a \$5 million refund in an interview Thursday. He said universities want and need to issue refunds, but the hit is “pretty devastating.”

While the recent \$2 trillion stimulus package passed by the Senate offers higher education institutions more than \$10 million, some experts say it is not enough.

“While this legislation is an improvement from where the Senate started, the amount of money it provides to students and higher education institutions remains woefully inadequate,” President of the American Council on Education Ted Mitchell said. The council represents more than 1,700 colleges and universities.

Even before the COVID-19 pandemic, many UW System universities had been offering voluntary buyout/separation options due to loss of revenue caused by low numbers of enrollment and retention.

“Campuses are losing staggering sums,” Mitchell said. “If these needs are not met, students are going to suffer financially and may drop out.”

**“UW–Madison Calendar Modification Proposal Does Away with Spring Break,” September 15, 2020, Jessica Sonkin<sup>4</sup>**

*Due to difficulty containing the spread of COVID-19 throughout the Fall 2020 semester, the UW–Madison Faculty Senate decided to change the Spring 2021 academic calendar to avoid similar struggles. Daily Cardinal author Jessica Sonkin wrote an article for the newspaper’s website on September 15, 2020, describing these changes. The most significant alteration was the suspension of the university’s spring break that would have run from late March to early April; UW–Madison instead opted for a later start date to the Spring 2021 semester. While Sonkin mentioned that there would be scattered “wellness days” throughout the semester, the decision to eliminate spring break meant that students were expected to work through a full fifteen-week semester with little reprieve.*

The UW–Madison Faculty Senate voted in favor of altering the spring 2021 academic calendar. These changes include the removal of a usual one week spring break.

The Faculty Senate and involved university leaders believe that cancelling spring break will prevent excess travel and, hopefully, aid in restraining additional transmission of COVID-19 on campus. Proposed changes would not impact the duration of the spring semester. The academic year would still conclude on April 30, but spring semester instruction would start on Jan. 25 rather than Jan. 19.

“I realize the slog of going through a full 15 week semester with no break would be challenging, but given the vagaries of the pandemic, particularly in cold weather when people are indoors and the like...I’m enthusiastically supportive,” Provost John Karl Scholz said in response to the proposal.

Provost Scholz is not alone — the Faculty Senate backed his idea by voting 140-7 on behalf of the calendar modifications outlined in the proposal.

The proposed schedule includes a few additional class cancellations to recompense for spring recess: “Under this proposal, campus would cancel any classes scheduled for Saturday, March 27



## ARCHIVE

(Passover) as well as have one long weekend, from Friday, April 2 through Sunday, April 4, in lieu of the normal spring break.”

University leaders intend to stand by the proposed changes regardless of intended course delivery methods for the spring semester.

Other Big Ten schools — including Ohio State, the University of Michigan and Purdue — have already opted to abandon their 2021 spring breaks out of concern regarding the spread of COVID-19.

**“UW–Madison Sees Decline in COVID-19 Cases, UHS Urges Maintenance of Social Distancing,” October 14, 2020**  
**Gina Musso<sup>5</sup>**

*UW–Madison’s reopening in the fall of 2020 forced the university to suspend in-person classes for a two-week period in September. By October, however, positive tests began to decline on campus to a record low of about 1 percent. In an article for the newspaper’s website on October 14, 2020, Daily Cardinal author Gina Musso discussed the impact of recent administrative decisions. The quarantines imposed on two popular residence halls, Sellery and Witte, were one cause of the decrease in cases. University Health Services also opened up more buildings for on-campus testing and encouraged students to continue following the updated CDC guidelines for COVID-19 safety practices.*

The UW–Madison 7-day COVID-19 percent positive rate has decreased to 1.0 percent, following the university’s decision to pause in-person instruction and campus activities from Sept. 10 to the 25.

Over a month after Sept. 9, when a record 290 UW–Madison students and faculty tested positive for COVID-19 with a 12.8 percent positive rate, the 7-day on-campus positive testing rate now reached one percent, with 15 new cases reported Tuesday according to the Smart Restart dashboard.

The University Health Services (UHS) Director of Strategic Communications & Marketing Marlena Holden noted UHS’s efforts that contributed to the decline in cases.

“We continued to partner with campus to ensure the health and safety of students, staff and faculty,” Holden said. “We provided additional testing for those living in quarantined residence halls, increased testing for the remainder of the semester two [sic] weekly and saw numbers improve after campus quarantined two residence halls with high rates.”

The Sellery and Witte dorms and over 26 fraternity and sorority houses were also directed to quarantine.

“The pause in instruction and the quarantines made very clear to students what’s at stake,” Holden said. “We also put in place even

stricter campus public health protocols (for example, requiring masks outdoors as well as indoors) and more frequent testing of those living in residence halls.”

Since the outbreak, UW–Madison has implemented more testing initiatives. On Oct. 6, UW–Madison also opened up the Porter Boathouse, where the University rowing teams practice in the Winter, as an additional COVID-19 testing facility for curbside and pedestrian testing.

“Campus testing capacity continues to grow,” Holden said. “We are now testing residence hall students weekly, up from every two weeks. With the addition this week of another testing site at Porter Boathouse, we expect to be able to test as many as 14,000 people per week.”

UHS and Holden urge students to maintain efforts to stop the spread of COVID-19, including following public health guidelines, keeping a six foot distance from others, wearing face coverings and limiting contact with people who individuals do not share a residence with.

“Early research indicates that individuals can contract COVID-19 more than once,” Holden said. “It’s imperative that people are safe to protect themselves and others.”

In regards to recently-updated CDC guidelines saying that the virus can spread across distances of more than six feet indoors, UW–Madison spokesperson Meredith McGlone said the university has not altered their policies on in-person instruction.

“We’re evaluating the CDC update just as we do all updates to public health guidance,” McGlone said. “At this point they haven’t changed their specific recommendations about classrooms.”

To follow COVID-19 updates on the UW–Madison campus, check out the Smart Restart Dashboard. This is also the last week for students and faculty to get flu shots on campus.

**“A Timeline of Badger Football’s COVID-19 Outbreak,”  
November 5, 2020, Anthony Trombi<sup>6</sup>**

*The status of the UW–Madison football team was one of the most uncertain stories on campus during the fall. Anthony Trombi, an author for the Daily Cardinal, published the following article on the newspaper’s website in early November. The article outlined the football program’s COVID-19 response as well as various schedule changes. Trombi included accounts from UW Health explaining the standards that the university was required to comply with in order to compete. Unfortunately, the Badgers’ season was rather short-lived. Much to the disappointment of the program and the campus community, rising cases sidelined many key players and led to the cancellation of several games in an already abbreviated schedule.*

The University of Wisconsin football team has deployed rapid-response antigen tests nearly every day for players and staff since the beginning of the season. Deputy Athletic Director Chris McIntosh stated during a Wisconsin Alumni Association Livestream earlier in the year that UW felt good about where they were heading into the season, explaining daily testing and smart choices made by players and staff.

**Sept. 30 - Oct. 20:** Only one positive test appeared after going through their first month without a single outbreak of Covid-19. Wisconsin’s increased numbers of infection and positive rates heading in the wrong direction sparked concern. Assistant Athletic Director for Sports Medicine at UW Michael Moll voiced his concerns.

“You look at our state, look at our entire nation and across the world, as hard as people have tried, we haven’t completely solved this, we haven’t figured it out,” said Moll. “We’re just trying to do the best we can.”

**Oct. 23:** Head Coach Paul Chryst and every other test of his staff, players and game-day personnel all came back negative for Covid-19. Earlier that week one player had tested positive but the abundant negative tests showed positive signs for the upcoming Illinois game at Camp Randall Stadium. With the extensive number of negative tests, the Badgers elected to play against Illinois for their season opener.

**Oct. 24:** After the huge 45-7 victory over Illinois and breakout game by Graham Mertz, the excitement and momentum suddenly halted. Once the game was over, at least one more positive test had emerged. This sparked concerns as testing continued.

More testing occurred and the positive results kept coming. In the span of a week since the first game there were 22 confirmed cases with 12 players and 10 members of the UW staff infected. Among those players was redshirt freshman quarterback Graham Mertz.

**Oct. 27:** UW Chancellor Rebecca Blank and athletic director Barry Alvarez make the tough decision and cancel the Badgers' week 2 game at Nebraska.

"I am disappointed for our players and coaching staff who put so much into preparing to play each week," said Chryst in UW's statement. "But the safety of everyone in our program has to be our top priority and I support the decision made to pause our team activities."

**Oct. 27 - Nov. 3:** UW Athletics announces that 10 student-athletes and 11 staff members have tested positive for COVID-19. According to the university, there are 27 active cases within the football team.

**Nov. 3:** UW Director of Athletics Barry Alvarez announced that The University of Wisconsin football team will not be playing its home game against Purdue on Saturday. All team-related activities will remain paused indefinitely with some athletes quarantining in local hotels.

In order for UW to keep playing football, the team must reach a 5% maxim [sic] positivity rate. Dr. Jeff Pothof from UW Health explained that it is not difficult to achieve with a small group such as the football team. As long as players quarantine, socially distance, and wear masks, the spread will slow down significantly.

The Wisconsin Athletics program will provide another update on Saturday, Nov. 7.

**“Badger Seal Endorsed by the CDC to Slow the Spread of COVID-19,” March 1, 2021, Samantha Henschel<sup>7</sup>**

*Despite the grim nature of the 2020–2021 school year, research at UW–Madison continued to push forward. Several UW researchers came together in the spring to create the Badger Seal, an adjustable mask fitter that improved the efficacy of a mask. Samantha Henschel wrote an online article for the Daily Cardinal on March 1, 2021, outlining the design and use of the invention. Acknowledged by the CDC to slow the spread of the virus, the seal was one of the ten mask designs UW researchers created. UW–Madison immediately handed out this homegrown innovation to thousands of students upon receiving CDC approval.*

The Centers for Disease Control approved a mask fitter designed by engineers at UW–Madison to combat the spread of COVID-19 last week.

The mask fitter — called the Badger Seal — is a soft, adjustable mask frame with elastic ear loops that, when worn over a non-medical-grade disposable mask, has been proven to improve air filtration by covering gaps from regular masks.

“Adding the Badger Seal to this 3-ply mask was able to reduce the effective particle penetration by about 15 times,” Dr. Lennon Rodgers, one of the principal researchers behind the project, said. “That was a significant improvement and kind of heads toward that N-95 standard.”

The mask fitter went through 15 prototypes to reach completion, according to Fox 11 News. The idea was based on research on the levels of protection from different types of face masks.

Researchers in the UW College of Engineering found that the mask filtration system worked best when it was tightly sealed, which they observed by taping the edges of a mask to a mannequin.

“Adding the Badger Seal to a three-ply disposable mask helps contain aerosols and droplets,” Dr. Scott Sanders, another principal researcher on the team, said. “For wearers, a sign of a tight fit is when the mask material moves in and out with each breath.”

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According to the researchers, they also pioneered the project to provide a low-cost, adjustable option for a mask frame.

“It takes about five minutes to make, and we released the design, like our other COVID projects, as an Open Source design that anyone can use,” Rodgers said.

The UW Makerspace has released 10 other COVID-19 designs on their website, including a pop up face mask and surgical shields.

So far, 10,000 mask fitters have been distributed to university staff, according to Fox 11 News. However, students and staff can manufacture their own Badger Seal in the Makerspace lobby — or can go to [this link](#) to learn more details on the mask brace, including how-to-do videos and where to purchase one.



1. Michael Parsky, "In-Person Classes Canceled for Remainder of Semester: UW–Madison Adds to Growing List of Restrictions," *Daily Cardinal*, March 17, 2020, <https://www.dailycardinal.com/article/2020/03/in-person-classes-canceled-for-remainder-of-semester-uw-madison-adds-to-growing-list-of-restrictions>.
2. Michael Parsky, "Spread of COVID-19 Prompts UW–Madison to Postpone Spring Commencement," *Daily Cardinal*, March 23, 2020, <https://www.dailycardinal.com/article/2020/03/spread-of-covid-19-prompts-uw-madison-to-postpone-spring-commencement>.
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# What the Students Remembered

*University of Wisconsin–Madison Student Oral Histories*

## **An Oral History with Evan Sadlon, April 1, 2021**

*Evan was living off campus in Madison when the university went into lockdown. He faced many social and academic challenges as he finished the spring semester, many of which continued into the following academic year as the university held classes both online and in person.*

Interviewer

What is your affiliation with the university?

Evan

I'm a senior studying history and religious studies [at UW–Madison] and I'm also a member of *ARCHIVE* this semester for the first time. I've been going here for all four years and [am] finishing up graduating this May.

Interviewer

Where were you before the pandemic?

Evan

Before the pandemic, I was here on campus. I was having a good time finishing up junior year, looking forward to the next fall and senior year. I was planning on interviewing with several congressional offices at the [Wisconsin] State Capitol for the summer heading into spring break, so I was excited about that. And then—so that's pretty much where I was at.

Interviewer

Okay, okay. And did those plans get disrupted then from COVID?

Evan

Absolutely they did. Basically immediately after we got the notification, the university—well no, I'll start by saying that before we got the notification from the university, I was already feeling a little uneasy about things because I would contact these offices and they'd say like, Oh, we'll get back to you, we will get back to you.

## Personalizing the Pandemic

And then I would never hear a response. But I figured they were busy taking care of immediate things with the state and whatever's going on with this not-yet pandemic at that point. So I was already uneasy about it. But when I finally got the word that we were not going to be coming back to campus immediately after spring break, that's when I knew that, Hey, this internship opportunity probably was going to fall through.

Interviewer

What was that word? How did you get that notification?

Evan

Basically, I just kept calling and saying, Hey, can I schedule an interview with you guys? I'm happy to do something virtually. And they said, Yeah, we'll get back to you. And it kind of just petered out. I think they were preoccupied with what they had going on and I also figured it—I just didn't follow up with it continuously after about two months of following up. They never gave me an exact, Hey, we're not going to be offering you any internships. It was just kind of—we're done.

Interviewer

They just kind of ghosted<sup>1</sup> you.

Evan

Yeah, exactly.

Interviewer

How did you learn about the university's decision to close campus and cancel the activities?

Evan

Yeah, pretty much from the emails that we got. One of the worst—and this might sound bad—but one of the things that was most upsetting right at that moment was the cancelling of intramurals. My friends and I love playing intramurals. It gives us an opportunity to go outside, hang out, do a sport that I haven't played since high school—volleyball, soccer. I didn't play soccer in high school, but it was fun to try it.

Interviewer

You had volleyball in high school?

Evan

Volleyball in high school, yeah.

Interviewer

I'm jealous.

Evan

So yeah, it was just kind of those small things. Especially looking back now, we haven't had intramurals or the opportunity to go play organized sports for the past year. That's definitely one of the things that I've missed just socially and physically, stuff like that. Initially, that was the saddest part because we didn't know that we were going to go online initially, right? It was just like, Hey, we're going to go two weeks. It was easier to compartmentalize that. You'd be like, Oh, we'll be back in the beginning of April or whatever and everything's going to be perfectly fine. Essentially what I did after that was go home, outside Chicago. I basically spent the time at home taking care of classes and stuff. As the pandemic was progressively getting worse nationwide and other schools said, Hey, we're going to stay online, other friends from overseas were saying, Hey, we're being sent home and all that stuff happened. And it was basically just like, Oh, this is not going to be just a walk in the park. This isn't going to be a two-week deal. It was kind of a progression of just, Oh gosh, it's getting worse, it's getting worse. And now I'm home for the rest of the semester.

Interviewer

Do you think your reaction was different when you first heard that it was just going to be two weeks versus—what you're talking about—where you figured out that it'd be a lot longer?

Evan

I'd say yes. I think I tend to be an optimistic person, more so than some of my friends sometimes. And so I'm thinking like, Hey, we're going to be back in two weeks, it's going to be fine. And everybody else was like, Evan, this isn't—not that I was taking it lightly, you know? But it was just kind of like, I'm enjoying how school is going and everything else going on here and I kind of want that to continue. And, now that it's not going to happen, it's kind of disappointing.

## Personalizing the Pandemic

Interviewer

It's just an unprecedented thing.

Evan

Yeah, exactly. Exactly.

Interviewer

You just have to process and, well, everybody does it differently. So did your living situation change when you heard that in-person classes were canceled?

Evan

Pretty much. So my sister was a freshman at the time and I was a junior. She was a freshman here at Wisconsin as well and she was living in the dorms. Our parents just said, Hey, guys just come home, stay at home the rest of the time. The best thing about it was not having to worry about food all the time and going shopping. That was probably the best thing—getting home-cooked meals again. It was an interesting thing because for the most part, junior year going into senior year, I was planning on staying in Madison over the summer with the internship at the capitol. But going home gave me the opportunity to be with my parents again, be with my family for an extended period of time that I otherwise would not have had. So it's kind of nice to be able to be in that moment and reflect on it and say, Hey, this is time that I can get with my loved ones that I might never—I might not live extensively with them for a long time now. Maybe not at all again, after graduating. It was kind of a mix of like, I'm not at school and I'm not with my friends. I'm with my family all the time. Which, when two of us are taking college classes and my parents are both working from home, it's tight quarters, right? Everybody's in your space all the time.

Interviewer

Yeah.

Evan

Which was a little bit of something that I had to get used to when I was taking classes.

Interviewer

And do you think there's a difference in the way that you took classes at home versus in Madison?

Evan

I mean, I'd say yes it was. It's just the transition to online was very difficult initially, especially being a history and religious studies major in the humanities where a lot of classes are discussion-based.

Interviewer

Yeah.

Evan

Several classes just turned to making discussion posts all the time and responding to someone else's discussion post on the Canvas<sup>2</sup> site. Others we met synchronously, which was nice. But the teachers were still getting used to learning Zoom<sup>3</sup> and I know they struggled. We struggled. It was just because it was so quick—just a quick reaction by the university to say, Hey, try this. But we got through I think.

Interviewer

We did. It was a matter of adapting.

Evan

Right. Right.

Interviewer

You think—for your experience—do you think your classes were better or easier to take after that spring semester? Like in the fall when we had dealt with this a little bit longer?

Evan

Yeah. I'd say once we got back to the fall, I found a—I had several in-person classes at that point because they're smaller classes and most classes under fifty people were scheduled to be in person. Several different things happened. There was a spike in cases in Madison, right, and everything went online for two weeks. At that point, two of my professors that were in person decided to just have everything online from there on out just because, hey, abundance of caution. If it's working for us to be online, it's not necessary for us to be in person. That was their thought. We tried,

for one of those classes, to go back in person again. But because of the dual option of, Oh, I'm going to give an in-person lecture but also going to post it online at the same time, several students—most students—figured, I'm just going to stay at home and watch them.

Interviewer

Yeah.

Evan

And then I had one class that was continuously in person, which was a nice change of pace from all the online classes, right? I figured that it just really gave me the time—one of the things I figured out that I missed most about going to class all the time in the fall and being online was just walking to class. That time when you're going from building to building during the day, you pop your headphones in and listen to music, listen to a podcast or something. That's the thing that I miss most, just being outside and having that fifteen, twenty minute stretch to myself and just in my thoughts walking to class. So yeah, that's the kind of thing that I've come to think like, wow, that's what I missed the most.

Interviewer

Yeah, yeah. The walking definitely. I've put on more weight because of my lack of walking. Did you have any summer plans before then? Were they affected by all the changes happening in the spring?

Evan

Yeah. Apart from the internship that I was planning on doing, I went home, stayed at home for the summer, and found a virtual internship with the Lutheran Office of Public Policy in Wisconsin. And they were just—I was the first virtual intern for them, right, because they were adapting to the whole online thing too. So that was a nice learning experience and I was able to work for like two, three, four hours a day on climate change advocacy with the office. It was nice to be able to find that other option. And it was great for my supervisor, the director of the office, who was very open to whatever I wanted to do and however we can make it work, you know, because she was trying something new as well with the whole virtual option—

Interviewer

So they were adapting just like you were.

Evan

Yeah, yeah.

Interviewer

Were you thinking about taking any summer classes before the pandemic?

Evan

No. No, I didn't. I wasn't planning on taking summer classes. I wasn't planning on it, but I can only imagine having not only the transition in the spring from in-person to virtual [classes], but having to generate a whole class immediately for the summer being impossibly difficult. And I know a lot of students—we like to complain about how difficult it is taking virtual classes—but I can only imagine professors that have been teaching for several years their class their one way, and then having to change that dramatically. It's gotta be tough. So I always do try to think about that and keep that in perspective when I'm taking these online classes.

Interviewer

And do you think that the classes—you said you're [a] history and religious studies [major], right? Do you think that the type of classes in the majors you have are uniquely impacted by the pandemic in the sense that they're not in person anymore?

Evan

Different parts of different classes would be, right? So, because of the discussion factor in the humanities, it really takes a toll [not] being able to just have a back and forth with people. I took a philosophy class both last semester in the fall and this semester that's in person. And, even though our desks are six feet apart and we're all wearing masks, when people speak up and you can hear everybody a little bit better, it's easier to have that back and forth. That's one thing that really wasn't that big of [a] pain in person, but, for a biology class or an organic chemistry class, I can only imagine not being in person and having to do a lab section online. I just couldn't—I can't imagine that. That's got to be so difficult.



## Personalizing the Pandemic

Interviewer

Yeah, I prefer not to.

Evan

Yeah.

Interviewer

So where are you living now then? Are you back in Madison?

Evan

Yeah, I'm back. I'm back. Well, not [in] on-campus housing, but just off campus and going to in-person class. I still have one [in-person class] now. And, even though we've been going to class, the biggest change from last fall to this spring is the testing that we've been doing, the COVID testing, the spit testing. It's a little bit of a hassle going in there and having to drool for five minutes into a cup. While it can be difficult to say, Oh gosh, I got to go get my spit tested, my Badger Badge<sup>4</sup> expires in a couple days—or in the next two days—and I won't be able to get it tomorrow so I gotta go today. While it's a little difficult to fit that in and make time for that, it is worthwhile—especially when I'm going to class—knowing that everyone else in the same classroom has the green Badger Badge. I'm more comfortable in that environment. Going to work out at the new recreation facility, I know that everyone in there has a green Badger Badge so they haven't tested positive in the past couple days. So, not only does it actually keep control of the spread of the virus a little bit, it also helps reassure me that, Hey, if I do the right thing, we're going to make it out of this.

Interviewer

So you would say that the Safer Badger<sup>5</sup> app and that system just kind of lets you go about your daily life a little bit easier?

Evan

A little bit, yeah. It gives me a little sense, a good sense of security. I'm not going to say that it drastically changed how I felt from first semester—from the fall semester—to this semester because in the first semester we didn't have this and I was still going into class feeling okay. But I also feel fairly secure in the way that I've been managing this pandemic in terms of washing my hands, putting on hand sanitizer after touching doorknobs and all that jazz, and wearing a mask all the time going to class, back and forth and all

that. But the Safer Badger app does offer kind of another layer of security. Yeah.

Interviewer

And so other than washing hands and hand sanitizer, have you made any other adjustments to your daily routines, like your usual, whatever you're up to?

Evan

Um, not entirely. I mean, it's hard thinking back to, like, how I reacted to each level of advice from the science community back in the beginning of the pandemic. It used to be when you leave your house, you grab your wallet, your keys, your phone—and now you just throw the mask on. It's just a part of the routine now. I mean [apart] from that, my daily routine really hasn't changed too much. It's nice. It's interesting now that I keep hand sanitizer in my backpack more often than I used to or in the car more often than I used to, just being aware of what I've touched is interesting. Yeah, maybe that's just a me thing.

Interviewer

Like a backlog of all the things you've touched throughout your day in your hand.

Evan

Yeah, exactly.

Interviewer

So we're almost done. I guess the last thing I'd ask is how your classes are going right now? How are your interactions with your professors right now? And how do you see other students handling the changes right now?

Evan

My classes are going fairly well. Like I said, I have one in-person [class] right now and that's—it's a nice change of pace. My Wednesdays, I have three classes. Three two-hour lectures on the computer, sitting in this room, staring at the screen, basically back to back to back. And then on Thursdays I have my in-person class, so it's nice to get outside for a little bit before sitting in class and not having to stare at a screen the entire time.

## Personalizing the Pandemic

Interviewer

Six hours, dude? Oh my god.

Evan

Yeah, it's the one brutal day of my week. The professor that teaches that class—he's very optimistic about the situation and he's very committed to teaching in person. He knows that it's not only good for him as a teacher but also for us as students learning the information. That class is actually in philosophy of education so it's very timely for talking about the virtual class and stuff like that. Several students I've heard are not as happy with their virtual classes. I don't know much more about their "disgruntledness" with it and how or why they're upset with it, besides the learning curves that come along with being online. Maybe it's because I'm a senior and have had in-person classes before and they might be a freshman or sophomore that never had in-person classes. Knowing how to deal with professors and knowing how to interact with them—I'm also taking a lot of professors this semester that I've taken in the past so that's helpful for good relationships. Going to office hours is one of those things that I still feel comfortable doing even though they're just online. I can just hop in and say, Hey, how's it going? And, if I didn't have those relationships already, I might have a very different outlook on it, you know?

Interviewer

I guess the last thing I want to ask is, if you were a freshman during all of this, how do you think that would be different than you having the experience of being in person for the first two, almost three years?

Evan

Yeah, I don't know. That'd be tough. That'd be really tough. Because I remember the dorm life was so different. I mean, I don't know exactly all their protocols they have to go through, but just being able to go into my friends' rooms down the hall was just like second nature for me. We all had intramural teams that we would hang out with and go play sports with. We would go to the dining hall and sit down and eat together. And it's interesting to think about what my freshman experience would be like if I had to go through it in the pandemic. I don't know. I feel like I'm in a good position where at least I'm lucky that the pandemic happened during my junior year. I think it would have been best

## ARCHIVE

for sophomore or junior year, just because at this point I'm going to get graduation in person. I couldn't imagine having this happen at the end at my graduation, like if I were graduating last spring. I couldn't imagine being a high school senior at that point and then going into freshman year as well. So yeah, I feel very fortunate to kind of have a handle on how this has hit.

Interviewer

Yeah, I've thought about that too. Well, I was a sophomore when this all happened. I was like, You know, it's kind of best that it's this rather than me being a freshman or me being a senior or whatever.

Evan

Yeah. And also being able to be close to home with parents that are willing to work with me was also very nice. They were looking to help out whenever, however, they could, inviting my sister and I home. So I was very lucky to have that as well.

Interviewer

Well, I think we're at twenty something minutes, Evan. Well, you're the first one [interviewee], you're tapped out and done now.

Evan

Cool. Thanks.

1. Ghosting is a colloquial term for dropping all correspondence after a period of communication.
2. Canvas is an online platform used to store course materials and administer tests and assignments.
3. Zoom is a video-conferencing service used to host synchronous class sessions. In these sessions, classes met at a specified time over a video-sharing platform.
4. The Badger Badge is a page in the Safer Badgers mobile application that UW–Madison students used in the Spring 2021 semester. The Badger Badge page contained the students photo and a badge with a scannable QR code. This code would appear as either red, yellow, or green based on the results of their recently mandated COVID-19 testing. Green badges were required to enter campus buildings.
5. The Safer Badgers app is a mobile application that all UW–Madison students were required to use in the Spring 2021 semester. The app contained the university's COVID-19 guidelines, information about testing locations, test results for university-mandated COVID-19 testing, and the Badger Badge page.

**An Oral History with Haley Drost, April 1, 2021**

*Haley was living in one of UW–Madison’s residence halls when the COVID-19 emergency started in March 2020. Forced to quickly move out of the dorms, Haley had to navigate this process and adjust to online school at home in Minnesota.*

Interviewer

So, Haley, what’s your affiliation with the university?

Haley

Well, I am a student here [at UW–Madison]. I’ve been a student for three years. I’m a junior now. I also work here. I work in isolation housing within the housing department. So those are my two connections.

Interviewer

That’s fun. And did you have that job before COVID or did you get it in the middle of the pandemic? How did that go?

Haley

Yeah, so in the spring I was like, Oh, I should really get a job on campus for Fall 2020 and they posted the job in the summer—or maybe it was late spring, early summer. I started in fall of 2020 because the position was entirely new. They didn’t—obviously they didn’t need an isolation housing before the world ended.

Interviewer

Perfect, perfect. Before the world ended. Where were you before the pandemic?

Haley

I was here. I was in Tripp Residence Hall. I lived there last year and it felt almost doubly concerning because I not only had to leave the university, like have online classes, but I had to completely vacate my dorm room. At that point in time, my family was living in the Twin Cities<sup>1</sup> so it was a whole, you know, move-out process.

Interviewer

So that’s a decent drive too.

Haley

Yeah. Well, I remember classes were put online and everything was shifted to be that initial two-week break and then it changed from two weeks to the rest of the semester. I got an email on—it was, like, [the] middle of the week—and it was from the housing department.<sup>2</sup> And they said, Listen, if you don't want your stuff to be moved into storage, you need to have all your stuff out of your room by something like 9 p.m. that night and turn in your key. Well, at that point it was 3 p.m. and I was in St. Paul and so I went to [my] mom and I was like, How are we going to do this? I think they're just going to put my stuff in storage. She's like, No, we can do it. And so we got in the car and drove four and a half hours straight, got all of my stuff, and we got back in the Twin Cities by I think 2 a.m. So that was a really, really fun experience having to do that but luckily—

Interviewer

That is a lot, yeah. Do you think that would have been easier—I mean, this is kind of an obvious question—but do you think it would have been easier if you had been living closer?

Haley

Yeah, definitely. I knew people living in the dorms and they were like, Yeah, I just drove up there and got my stuff and left. And there I was trying to beat the clock. I wish they would have given us, like, maybe one day like, Hey, have your stuff out by the weekend or something. But I understand they were trying to move with the changing circumstances, everything involved. I know they didn't want to prolong the event because that would be more exposure and stuff. But yeah, nevertheless, I feel bad for kids who just weren't able to get their stuff at all because—who knows—it feels a little weird to have somebody go into your room and pack up all your stuff for you if you don't know them. I'm glad I was still able to get down there myself.

Interviewer

That's good. That's good. You mentioned that you learned about the housing [situation] in the middle of the week. How did you learn about the decision to close the campus and cancel activities?

Haley

I remember I was, like, out and about—I think I was at dinner with a friend of mine. We were eating some meal and all the communications started to come through about campus closing and she asked me like, What are we going to do? This is ridiculous. Like, two weeks? I don't want to go home for two weeks. Can I just come stay at your place for the next two weeks? And we were seriously considering just having a nice two-week extended break with each other at our houses. Good thing we didn't do that because it was quickly turned into—what was that—a six-month spring break?

Interviewer

Yeah, big difference from two weeks. Did you have a different reaction when you thought it was going to be two weeks initially to when you started figuring out, or the university started telling you, that it was going to be longer?

Haley

Yeah, I was frustrated because my entire family was cooped up in the house. I have two siblings and both of my parents and my younger brother are very active people, so they were going a bit stir-crazy in the house. My father really likes to lift weights, so he set up this gym in the living room with salt bags and broomsticks and was trying to power lift. So after two weeks of this I was thinking, I can't do another six weeks or how many more. Don't get me wrong, I love my family. But being cooped up in a house with these people—I wasn't concerned about COVID though. Like, I wasn't concerned about really contracting it or the devastating effects that it would have. I was just more concerned with the sort of inconsequential disadvantages that I would have living at home with my parents. I suppose it was sort of closed- or small-minded but, at that point in time, I wasn't thinking about 500,000 people dead.

Interviewer

Some of the other reactions you're talking about—some people were able to get their stuff out really quick and some people were more scrambling—what was it like that day in the dorms? Did you talk to other people? Were they excited, scared, or nervous? Confused?



## Personalizing the Pandemic

Haley

People were generally a bit confused, especially since I was in Tripp Hall. A lot of international students live in Tripp and Adams and so I talked to a couple of them and they were generally confused and concerned over how the logistical situation was going to work for them. I think we try to place this sense of doom onto the spring, but, when it first happened, I don't think anybody had the sense of doom quite yet. So when it initially happened, people were just generally confused and frustrated over what was going on, not really thinking about it in an existential sense, just more like, This is a huge inconvenience and a nuisance to deal with. But I think that probably changed as weeks went on.

Interviewer

And so you'd say the atmosphere was maybe just—because it was unprecedented, it hadn't happened yet, nobody knew how to deal with it—it was mainly just confusion?

Haley

Yeah. Kind of passive confusion, I think. I don't think anybody at that point in time was angry yet, I think. No high levels of anger and frustration. But at that point in time—I don't know if you remember, but I remember the first time seeing someone wear a mask out and about on the street and I was just like, What's going on? I mean go for it, but I was just confused. I wasn't, I don't know, angry about it.

Interviewer

I remember when they were—when the CDC said that masks were ineffective. And I think it was my boyfriend and I, we were at the grocery store, and I remember being like, Oh my God, look at these people with masks. They're stupid. They don't know what's going on because the CDC said this. And then like a week later they're [the CDC] like, Oh, never mind, wear your masks. [It was] like a 180, you know? And you talked about your experience of leaving campus and with your mom and driving back and all that. What were you thinking, feeling, I don't know, just during that process?

Haley

So on the drive there, I was so anxious and so nervous. I have a twin sister and my sister came with me and she had to do the same

thing. But she had a little bit more time at her dorm. I don't know what the case was, but she was able to get her stuff out successfully so she came along to sort of calm me down along the way. But I just—that entire four and a half hours there—I had all the worst case scenarios go through my brain. I'm like, What if I can't get my blankets there? I left most of my clothes there. It was just a very tense car ride. On the way back, well, one of the oddest moments was looking around my dorm room completely empty and thinking, I'm never going to be back in this building. Like, I will never see these people again on my floor. I will never get to sleep in this room again. This is really, really odd. And I was thinking on the drive home—I was exhausted—but I was thinking that this is a significant moment now. It became a lot more real when I actually had to go through the process of making tremendous efforts.

Interviewer

Did the university have people—were there people helping other people move out or was it strictly just you and your family?

Haley

It was just me and my family. We got there later at night so there might have been people earlier in the day helping. But, when I was there, there was nobody there. I can't remember exactly. I'm keen to believe, though, that there probably weren't people helping because they were concerned about the spread of COVID and infection. Also, wasn't it—we didn't call it COVID in the beginning. It was coronavirus. So it was always like, "The corona, the corona." But now it's referred to as COVID-19. But they were worried about this coronavirus—Oh! I lived up on the third floor and there's no elevator so I had to go up and down and up and down and I was so tired.

Interviewer

That would—that would be really difficult. I didn't live in the dorms last year, so I was kind of glad about that because I heard about all this and I was like, Oh my God, that's a headache.

Haley

Be glad. Be glad.

...

Interviewer

Do you want to talk about how the rest of that semester went—spring semester—and maybe even if COVID affected some of your summer plans or anything else?

Haley

Yeah, it was a difficult semester because I think there is this perception that—maybe I'm being biased here—but that STEM kids<sup>3</sup> have it worse when it comes to online learning, not being able to have labs and the other types of physical interaction with materials. And I most certainly think that's true and I'm not trying to discount that experience. But being in humanities, trying to have discussions and other forms of verbal conversation and writing online was, and is, this entire year, very difficult to do effectively. As you're very familiar with, conversations on Zoom are very stilted and awkward. It's difficult. For the most part, though, my professors did a very wonderful job of adapting to the circumstances. They were very engaged and committed to making that change and I'm very grateful for that because I have two other siblings. My sister's professors were very—they definitely had a difficult time transitioning over to that process. And my brother was doing his senior year of high school online. Academically, it was actually okay and I didn't mind not having to have a test in my science class because I despise science and I'm terrible at it. It was difficult to be cooped up at home with a bunch of people who want to do nothing more than leave. It was most definitely a process of sort of adjusting to each other as a family, as people living there. I think I stayed in the basement. I just never left the basement and my parents always joked like, It's like you have an apartment down there now. And I'm like, Well, it's so that I don't have to be bothered by my younger brother who was just—ugh, Tyler—he's obnoxious. I love him, but he's obnoxious sometimes. But when the summer came, my plans were changed a bit. I had anticipated having somewhat of an internship at a credit union and that fell through. So now I'm like, What am I going to do? I need to make money and I need to pay rent this next year and so I ended up working at Hallmark, the card store. I have so many stories from working at Hallmark, but it was actually a very positive experience. Most of my coworkers were retired or senior citizens, so that was a very nice group of people to work with. I was able to rebound and get another job, but I think a lot of college students felt the lack of

internships very, very severely and confusion over how they were going to be young adults, as young adults.

Interviewer

Yeah, totally. I think we'll do one more question. How did it [the pandemic] affect your social life? Because I know I, as an upperclassman, thought about that. If I was in the dorms, and I had all this happen, I don't know how I would have made friends or if I would have struggled a lot more. Do you want to talk about that a little bit?

Haley

Definitely. Honestly, this might sound a little sad, but I didn't have much of a social life before the pandemic. So it wasn't that big of a difference for me. I didn't feel it as severely because it's been a very difficult past number of years at the university in general. So, when the pandemic happened, my concerns were more logistic and academic than social. I was talking to an old friend of mine who I went to high school with, and she was very much feeling the lack of social interaction and just sort of that loss of community and friendship. But for me I was like, You know, the internet is still out there and I was on the internet before the pandemic. I'll continue to be on the internet after and during the pandemic. On the flip side, what I did miss was—even though I didn't have and I still don't have very deep social connections here at the university—I still miss just seeing people in classes and having those conversations and, you know, seeing people walk down the street and maybe turning to your friend and having a side conversation about people out and about. That's the thing that I missed. Just that more casual, informal type of social interaction that you just don't have during the pandemic.

Interviewer

Yeah, I remember in Madison—because I was here in March and then the summer—and it was like a ghost town. As far as streets and all that. So, like you're talking about, that more passive social interaction was just gone.

Haley

Yeah. I think it was the night before—not the night before—but one of the days leading up to that initial two-week break, a friend, who's now my roommate, and I were walking down Langdon

Street.<sup>4</sup> And there was a group of sorority girls or something walking in one of those obnoxiously long lines that blocks the sidewalk. She turned to me and was like, Man, can't these girls get out of my way? And, for whatever reason, I remember that so vividly because that was the last time I had one of those interactions with sorority girls on Langdon Street. Which is such a little thing, but once it's gone you're like, I kind of miss that in a weird way.

Interviewer

I miss the sorority girls taking up my space.

Haley

Exactly, exactly. I missed that. I don't know why we were walking on Langdon Street. We had no reason to be there but whatever. Sometimes it's fun to walk down Langdon Street and just see all the activities that are going on outside.

Interviewer

The activities.

Haley

The activities. Yep.

Interviewer

I think we're good, Haley. I think we did what we needed to do. Thank you for doing this today.

1. The Twin Cities is a common name referring to the neighboring cities of Minneapolis and Saint Paul.
2. Monday, March 23, 2020 was the actual date the referenced email was sent.
3. Students enrolled in the fields of Science, Technology, Engineering, and Mathematics are commonly known as STEM kids.
4. Langdon Street is a street in Madison that runs along the shore of Lake Mendota on the eastern side of the UW–Madison campus. The majority of the fraternities and sororities at the university are located on or around this street.

**An Oral History with Taylor Madl, April 4, 2021**

*Taylor was in the middle of a year-long study abroad program in Freiburg im Breisgau, Germany when COVID-19 cases began to rise. Taylor was asked by UW–Madison to return to the United States in mid-March as the situation escalated. She finished the Spring 2020 semester from her hometown in northern Wisconsin.*

Interviewer

Hi Taylor. Can you tell me what your affiliation is with the university?

Taylor

I'm a student. I'm a junior here [at UW–Madison] studying history and German.

Interviewer

Perfect, perfect. And where were you before the pandemic?

Taylor

I was in Freiburg im Breisgau, Germany.

Interviewer

Was that a study abroad program? What were you doing there? Were you there with anybody else?

Taylor

It's a relatively large program. Madison and Freiburg are actually sister cities so there's a lot of alumni and networking opportunities in that program. It was forty of us on a year-long, two-semester program. We had moved in in September, and we were going to come back in the tail end of August. That was the plan. Obviously, it got cut a bit short. But yeah, we had one full semester of the German academic experience before COVID hit.

Interviewer

Can you tell me a little bit about the day when you found out about some of the COVID stuff happening at the university?

Taylor

From what I heard back at Madison or what I heard about the unfolding events in Germany?

Interviewer

Why don't we do both?

Taylor

So the first time I heard about COVID it was at the end of January. I had seen some issues going on in Wuhan, and I really didn't think about it again until, you know, I'd hear something here or there through February. And then in early March, like very, very early March, we got a huge text from my advisor saying, They might cancel programs, but, because this is a year-long program, you guys have been here for so long, you're settled, so I wouldn't worry about it. A week or so later, I was out with friends. I think this was actually the very last night that people could have gone out like this. I got an email at like 11 p.m. local time with the official, "You have to go home." I think I just looked my friend in the eyes and we went to get a drink.

Interviewer

That's a good source of coping.

Taylor

Right?

Interviewer

Could you tell me a little more about the email?

Taylor

Yep. The email was from the official study abroad office back in Madison. It said everyone is getting sent home—doesn't matter where or who. We had, I think it was ten days to figure stuff out.

Interviewer

And [do] you want to talk a little bit about how you were feeling about that? Or maybe the aftermath of hearing about that? Oh, man.

Taylor

Yeah, it was overwhelming. I mean, I had a partner at the time too—so there was that whole issue. I also made some really close friends, with not only the people in my program, but people I lived with—my German roommates, German friends, German classmates. So telling them I had to leave was really upsetting. I



## Personalizing the Pandemic

remember they were like, You're going back to the United States—won't that be worse? Just given, you know, the state of healthcare and stuff? I had to be like, I don't really have a choice. It's not my decision.

Interviewer

So would you say you were confused, disheartened? What kind of emotions were you feeling?

Taylor

Oh, all of the above. The logistics were confusing. Booking a flight that late was difficult. Restrictions were evolving constantly. It was like, You can't travel here, you can't travel there. This place is shutting down its airports or lowering the number of flights that are available. So that was really confusing. And then, of course, I had to send texts to my family being like, So who's going to pick me up from the airport six hours away? It was disheartening because—I don't know. It just felt like I built that life for so long, even though I guess seven months doesn't seem that long in the grand scheme of things. But seven months is more than enough to get comfortably settled. And especially since I was planning on staying there for significantly longer, I definitely collected a lot of things and stuff that worried me like, How am I going to get this back now?

Interviewer

You mentioned your German roommates. Did they have anything happen with COVID in their school?

Taylor

Other than the online stuff they didn't really experience that much. I guess, okay, so when COVID had hit, we were in what would be considered in the German academic calendar as winter break. So they had gone home to see their families before I had gotten the email that was sending me home. So I had no way to say goodbye. I had to go home immediately. I had to just text them and be like, I'm not going to be here when you guys get back.

Interviewer

I'm sorry. That sucks.

Taylor  
Yeah.

Interviewer

So do you want to talk a little bit then about, like, how you actually left the program? Did you get any help leaving the program from advisors or anything like that?

Taylor

So the day after the program was cancelled, they called an emergency meeting. And they'd given us all, like, a huge stack of paperwork that was like, Here's how to tell the student housing administration that you're leaving and that they can start looking for someone to sublet your room. Here's how to close your foreign bank account. Here's how to unenroll from university. So we had a whole paperwork party where it was just the forty of us going through these paper by paper, making sure we were filling things out correctly. [Pause] The following day, we had a last hurrah—a get-together. That was the last time I saw most people from the program. There were actually a lot of people who were trying to say they wanted to stay independent of the program. They're like, Well, my visa is technically valid for six or so more months, can I just stay here? Eventually, we all gave that up because it got too complicated. So we finally were like, Okay, we'll start looking for flights and whatnot. I remember my last night. My flights were getting canceled pretty much as soon as I was booking them. I would book a flight with three layovers, one of the flights would get canceled, and I would have to reroute my whole trip. Of course, that was really frustrating—not to mention worries about luggage and all those things. Luckily, I turned out okay. I ended up getting a direct flight from Frankfurt to Chicago. In terms of help, we got an offer where we could take out a loan from the university. We could just borrow money for a flight. But when you're in that situation, I feel like you just want to get your flight yourself because it's like everything's going to change so fast anyways. And then on top of that, we had six months left of rent payments because we had all signed year-long leases. Um, we didn't actually get any help from the university to pay the last six months or so of our rent. We just kind of had to figure it out.

Interviewer

So you ended up paying the last six months of rent?

Taylor

Yeah, I think I—out of the six months—I paid for four of them before I finally found someone to sublet my room. Because, of course, no one's looking for new student housing in a pandemic. Everyone just moved back to their families.

Interviewer

So were you thinking or feeling anything on the flight back? Was there anything unique about maybe coming home, seeing your parents, et cetera, et cetera?

Taylor

Oh yeah. The flight attendant definitely caught me having a few tears. I was getting my ginger ale. I'm just, like, crying. But yeah, there were a lot of strong emotions. It was like that feeling where you have so many thoughts that you don't really know what to feel, so you're just staring into nothing. Just what do I do? What's happening? That eight-hour flight was the first time that I was alone to process that feeling. When I got back to Chicago, the airport was empty. The airplane was half empty too. They wouldn't let you sit next to another person. It felt like a very sterile environment. Even though, looking back, it's actually gross because there were no masks, no nothing. Oh yeah, this was still in the "save masks for healthcare workers" phase of the pandemic.

Interviewer

Oh, I remember that. Fauci<sup>1</sup> was like masks are bad and I went to the grocery store—this is off-script—I went to the grocery store and I was like, These idiots wearing masks, the CDC said otherwise. And a week later they're like, Oh, psych! Other way around. Yeah.

Taylor

Yeah. It was a very desolate drive back up north because I'm from northern Wisconsin. On the day we drove home, it was rainy. Um, yeah, that did not help, the environment, the mindset, I guess. It was a six-hour drive through grass and nothing with my mom. I could tell she was trying to make me feel better about it. She was like, Well, maybe it's meant to be, maybe this is what was meant for you. And I was like, I don't think so. Yeah, it was pretty sad.

Interviewer

Pardon the pun, but you were doing a lot of unpacking at that moment. Um, do you want to talk about the rest of your spring semester? Did you take classes through your study abroad program—as in your German university? Or did you take it through the UW system?

Taylor

So we were on what was our equivalent of winter break at the time. We had just enrolled in classes for the upcoming semester. All that got shaken up. Some classes weren't being offered anymore because German universities aren't used to the online format—everything is really old. Like, you have to physically mail your final papers in. Yeah, so some stuff just fell through because the university wasn't ready for that. For my program, a few professors put together some classes for us, mainly within the realm of, like, what most people that study abroad take. So they offered a couple of history classes, some linguistics classes, some German courses. We kind of had to take whatever was given to us. And I think I took a couple UW summer semester classes just to round it out and get to my minimum credit number. So it was a little bit of a mix of both, all of which were online classes. I took them from my hometown, and I had a really bad internet connection the whole time. So asynchronous classes and any asynchronous assignment was a blessing.<sup>2</sup>

Interviewer

Yeah, no kidding. Do you want to talk a little bit about your impressions of the media coverage [of the pandemic] both in Germany, maybe before you arrived in the United States, and then maybe how that differed when you got to the United States—how both countries are covering COVID?

Taylor

Like I said, the first time I'd ever even heard about it was when it was still at Wuhan. And I remember seeing some headline, I think it was on the meme page, the UW Facebook Meme Page,<sup>3</sup> about the first case arriving in Madison. And I was like, Oh no, that sucks. Again, I didn't think much of it after that because, for whatever reason, the local coverage about it didn't really start picking up until everything was being shut down. I was hearing some stuff from friends about the US, but I wasn't

watching US news. What else? Oh, my parents are more on the conservative side, so I got, like, the Fox News digest of COVID. Like, everything's a hoax. Yeah, I don't know. I just came to the point where it's like, I didn't want to hear about it, especially from mainstream news coverage. I just didn't like the way that it was being presented. It was like no one really cares at a certain government level whether you live or die. So, like, I don't need to hear Rachel Maddow's<sup>4</sup> opinion.

Interviewer

And yes, yeah, we're almost at twenty minutes. So, the last question. Do you have any plans to go back to Germany?

Taylor

Yeah, actually, that's the after-graduation plan right now. I'm looking at grad school, trying to get to Berlin. I think that's a really fun city. Germany's a really great place. Yeah, I'm looking forward to it. I hope I can get there soon.

Interviewer

And are you still keeping up with some of your German friends?

Taylor

Oh yeah. I FaceTime<sup>5</sup> my old roommates pretty regularly. And I actually have a German roommate right now, which was complete coincidence. I practice my German with him quite a bit.

Interviewer

That's good. A silver lining.

Taylor

Right.

Interviewer

Okay, Taylor. Thank you.

Taylor

Thank you.

1. Dr. Anthony Fauci served as the director of the US National Institute of Allergy and Infectious Diseases during the COVID-19 pandemic.
2. Owing to the online format of the 2020–2021 school year, college courses were classified as either synchronous or asynchronous. Synchronous courses included lectures and discussions that students attended at a scheduled time, whereas asynchronous courses did not have time-specific meetings.
3. The UW Facebook Meme Page is a popular Facebook Group. It consists of UW–Madison students who post jokes that often carry a symbolic meaning or represent a particular theme about the school.
4. Rachel Maddow is a regular political commentator on MSNBC.
5. FaceTime is a way to communicate through video chatting using Apple products.

**An Oral History with Jeff Wang, April 4, 2021**

*As an international student, Jeff had to decide whether to remain in Madison or return home to Hong Kong when the university shifted to online instruction. Though Jeff eventually traveled back home for summer break, the pandemic made his trip and experience in Hong Kong a tumultuous one.*

Interviewer

Okay, we're ready to go. So I'm going to start out by asking you to introduce yourself, talk about where you were at the beginning of the pandemic, how you're affiliated with the university—

Jeff

Sure! Hi, I'm Jeff. I'm currently a second-semester junior and I'm studying history at the University of Wisconsin–Madison. At the start of the pandemic, I was actually on campus just like everybody else. But I think what makes my particular position unique is that I'm an international student. Facing the pandemic as an international student, I feel, was a lot different to how everybody else was interacting with it. At the start of the pandemic, I do admit, it was kind of scary. Everything was happening really quickly. At the start, it didn't feel like I really knew what the university was doing—what the university's plans were for international students. And yeah, I really wanted to go home at the start of the pandemic, but everything really got thrown up into the mix. It was kind of just, like, for the first couple months, a play-it-by-ear sort of thing. I guess that's a summary of what happened at the start, but it was definitely something very unconventional and difficult to prepare for.

Interviewer

So do you want to talk about how the international student community discussed the pandemic before the campus closure? Was there a conversation happening about that?

Jeff

Sure. I'm part of a group chat with a lot of international students from my freshman-year dorm floor and we were talking about—the number one question was, you know, What's everyone else going to do? Are you guys going to go home? Or are you planning to stay here—here as in Madison? And for me it was a pretty

difficult choice because going back to Hong Kong, at least at the start of the pandemic, felt like I was going in the wrong direction. You know, that's where the pandemic started and I at least felt like it would be safer here. So I ended up staying in my off-campus place in Madison. But a lot of people, because of their parents or other commitments, were saying it was probably best to go home. Everyone [in the US] was saying, Oh, the pandemic isn't going to hit us that seriously. And in a lot of international student communities, I feel that behavior did spark a little bit of concern considering how the pandemic was dealt with back home for me in Hong Kong. I had a lot of people saying, We know you're in America, we hope you're safe. We get that the standards—I don't want to say standards but rather the lockdown rules—are less strict over there. It just felt like everybody was very, very scared. And I think the primary objective was really just that we all needed to get home at some point.

Interviewer

That's interesting that you said that if you went home you were going back the other way towards the pandemic. Because, in my interview with Taylor, she mentioned that when she was in Germany she was more worried about going to the US because the Germans thought the US healthcare system was less apt to handle the pandemic. So just kind of an interesting little flip there. Do you want to talk about how you initially felt as things started to develop? Were you feeling scared or nervous? Confused? Excited?

Jeff

I would say there was a really weird feeling of apprehension. All my peers were trying to decide how they'd get home and when they would get home, but I thought I would just be safer in Madison. So at the very start of the pandemic, it very much felt like my future was really just up for grabs. I would just wait for the next day, play everything by ear, and see how things are going. I don't really know if I could boil that down into one very specific emotion, but that is really the best description of how I was feeling.

Interviewer

And did you end up going home? Did you go home for a bit initially? How did that work?



Jeff

Yeah, I eventually managed to go home once classes ended for the spring semester. I think it was about a week after my final exam. Let me tell you, typically it's a sixteen-hour flight for me to get from Chicago to Hong Kong. It's a direct flight. This time around, from my doorstep here to my doorstep in Hong Kong, I think it was about sixty-plus hours on the road. It was really crazy. I remember they only allowed you to fly out of certain airports in America to get back to Asia, and there were only certain places in Asia where you could go through. So on the way home, I got on the bus in Madison and stayed in a hotel in Chicago for my early flight to Dallas. From Dallas, I flew to Japan. And then, from there, I finally flew back home. But then, once I was home, the lockdown rules were really strict. Because I landed at night, the Hong Kong government set up this bus shuttle running in between the airport and this designated hotel. At the airport I got my COVID test and then they shipped me off to a hotel where they said, You're staying in this room—you can't leave unless we tell you and we'll give you a phone call in the morning about your COVID test. I was kept there for sixteen hours. The only human contact I had was a knock on my door in the morning, Hey, your breakfast is here. After it turned out that my COVID test was negative, they said, Okay, we'll let you go home. But once I got home, I had to stay there for two weeks with a GPS tracker and everything. I wasn't allowed to leave my house. Yeah, I stayed at home for the next two weeks. Once I was finally allowed to leave my house to walk my dog, it was a really good feeling. That's really all to say that they took the situation really seriously there. And now they've actually upped the severity of the lockdown rules. They've upped it to three weeks in a hotel that you have to pay for yourself. If I want to travel back home now, it wouldn't really make sense. I'm not shelling out for three weeks of solitary confinement.

Interviewer

Let's talk about where you ended up. When did you come back? Did you come back for fall semester? How did you get back? What were the differences between Hong Kong and the US in the fall?

Jeff

Sure. It was definitely easier getting out of Hong Kong than it was getting in. They said something along the lines of, Hey, you're traveling to the US, it's currently a high risk zone. Getting out was

the same sort of process. I had to stop in Vancouver and then in San Francisco and, finally, I got to Chicago. But coming back was definitely a lot easier in the sense that when I got here it was just kind of like, you know, I was free to go. My friend picked me up from the airport because the Badger Bus<sup>1</sup> stopped running. It was a really politically charged summer in the US but, aside from that, I couldn't really tell you anything that was massively different from what it was like being in Hong Kong versus being in Madison. In Hong Kong everybody was wearing a mask. Being in Madison, everybody was wearing a mask. So it didn't really feel like much of a change. I would say that if I ever forgot to wear a mask outside, no one would give me a dirty look in Madison. But if I actually got on a bus back home without a mask on? That's something that would definitely warrant raised eyebrows. I noticed that never really happened here in Madison.

Interviewer

So there's less of that social pressure?

Jeff

I suppose. I would also comment that Hong Kong as a city—people were very aware of contagious diseases. People are already on top of that. We had a very bad SARS<sup>2</sup> outbreak back in the 2000s. The memories of that are still fresh in people's minds. So when the [COVID-19] pandemic came around, when the swine flu<sup>3</sup> came around a couple years ago, everybody was just like, You know what, we're going to lock down. It almost felt like a cultural thing. Everyone took preventative measures really, really seriously. I would say that was definitely the biggest difference between Hong Kong and Madison. This communal sense of accountability, it was definitely a lot stronger back home.

Interviewer

Well, it's interesting you mentioned that because I remember when the pandemic started, I saw a statistic out of Hong Kong that it was like 97 percent, or like 99 percent of people, were wearing masks. And compared to the US, it's significantly different. I think we see more mask-wearing in Madison just given the educational level of everybody around, but yeah. Do you want to talk about—when you got back here—what your daily life was like, any adjustments you had to make, et cetera, et cetera?

Jeff

Sure. So, for me, it was really just falling into the regular part of online school. The biggest part for me, as I think Evan and Taylor probably would have told you too, was just setting out schedules for very, very unscheduled days. But what was more unique to me as an international student was trying to figure out how I was going to keep in touch with my parents. I've been here for the longest time, since coming here as a freshman. I hadn't gone back home [before the pandemic]. It's really just kind of figuring out a schedule where I can talk to my parents because there is a twelve-hour time gap between here and Hong Kong. I would wake up, try to talk to my parents a little bit, and then get on with the daily grind of online school. It was just building a schedule out of a very, very unscheduled day.

Interviewer

Definitely. So you talked about—oh, do you want to maybe talk about the time zone difference a little bit. You said you called your parents in the morning. Were there any difficulties with that? Did you have to adjust to that anyway?

Jeff

Oh yeah. I would notice that without a proper schedule, it was really difficult to set a normal workday. I would try to call my parents in the morning. There would be times when it was so easy to fall into this trap where I would stay on the schedule of my friends that were going to school in the UK or my friends going to school back home in Hong Kong. While I was here, I wasn't going out doing anything. I was cooped up at home. It was a bad habit of just not living the days in America or at least not living in the present in America. It really threw a wrench in the works—I was sleeping at very erratic times just to stay in touch with everybody.

Interviewer

Yeah, it sounds like you'd almost have to go, like, nocturnal. I had some of that myself. I guess we're almost done, Jeff. Really good interview. Do you want to talk about some of your future plans? Are they contingent on the COVID lockdowns? Do you want to come back to the US? Do you plan on going home soon?

Jeff

Sure. So I actually plan on getting back as soon as possible, as much as I really love it here and, you know, today's a great example—it's a beautiful day in Madison today. But I do miss a lot of things in Hong Kong. I do want to get back to Hong Kong, but right now it's just that the cost of going home is just so high. I'm not just talking about financial costs, like the cost of the plane ticket, the cost of the hotel. I'm also talking about, I guess, human costs. I don't want to make it sound like my position is like some sort of sob story. But it is demanding to be in a hotel room for three weeks on my own, not talking to anyone. For me, as much as I want to go home, that's not really something I'm willing to do just for the sake of going home. So I'm really hoping that restrictions are lifted as soon as possible. I think it's definitely possible with the vaccines coming out.

Interviewer

I don't blame you. I mean, three weeks in a hotel—that's horrid. Not to mention you'd have to pay out of your pocket which is another concern. Do you think if you were vaccinated it would be something different with the traveling process? Would you be able to avoid some of that?

Jeff

I am hopeful because the situation in Hong Kong is very similar to the situation here. They've just started to roll out vaccines. I think the two vaccines used back home are the BioNTech one and, actually, they're using the Chinese vaccine too. I'm hoping the government will recognize that I'm a Hong Kong citizen living in the US and I can get a vaccine here in the US. Hopefully, the government will recognize that it would be okay for me to go home and slowly work to lift those travel restrictions. So yeah, definitely right now, I'm very optimistic.

Interviewer

Hopefully things are starting to clear up here. I know in the US at least, I've seen stuff coming out and saying by the summer we may be back to normal. [Pause] Well, I think we're good, Jeff. I think that's kind of it. I'll stop the recording here.

1. The Badger Bus is a bus company that charts routes from Madison to surrounding cities.
2. Severe Acute Respiratory Syndrome (SARS) is a contagious and sometimes fatal respiratory virus. Between November 2002 and July 2003, 8,437 people worldwide were infected by SARS. Of these, 1,755 were reported in Hong Kong. In the United States, there were only 75 confirmed cases. For further reading, see “Cumulative Number of Reported Probable Cases of SARS,” World Health Organization, accessed May 4, 2021, [https://www.who.int/csr/sars/country/2003\\_07\\_11/en/](https://www.who.int/csr/sars/country/2003_07_11/en/).
3. In 2009, the H1N1 influenza virus, conventionally known as the swine flu, affected hundreds of millions of people worldwide. Estimates range between 700 million and 1.4 billion people were infected. The CDC estimated over 60 million Americans were infected with the virus between April 2009 and April 2010. A report released by Hong Kong’s Centre for Health Protection in November 2009 indicated that there were 32,301 confirmed cases in Hong Kong. For further reading, see “2009 H1N1 Pandemic (H1N1pdm09 virus),” Centers for Disease Control and Prevention, accessed May 4, 2021, <https://www.cdc.gov/flu/pandemic-resources/2009-h1n1-pandemic.html>; Respiratory Disease Office of the Centre for Health Protection, *Swine and Seasonal Flu Monitor*, vol. 1, no. 10 (Hong Kong: Centre for Health Protection, 2009).

**An Oral History with Isabelle Cook, April 16, 2021**

*As the 2020 ARCHIVE Editor-in-Chief, Isabelle had to adapt the journal's publication process once the university cancelled in-person instruction. She battled through unprecedented circumstances as both an editor and a student to produce Volume 23 of ARCHIVE.*

Interviewer

What is your affiliation with the university?

Isabelle

I'm an undergraduate student here [at UW–Madison]. I'm a senior majoring in history, economics, and Russian.

Interviewer

Fire, fire.<sup>1</sup> Where were you before the pandemic?

Isabelle

I was in Madison.

Interviewer

Just thriving? Sweet.

Isabelle

Taking calculus. It was a pretty tough semester to begin with.

Interviewer

Yeah, it sounds like it. How did you learn about the decision to close campus and cancel activities?

Isabelle

I was sitting in the [Wisconsin] Historical Society library when we got the email that campus would be closed for two weeks. I distinctly remember looking up when the email went through and seeing everyone in the library also look up from their computers or phones and just look around at each other. We were all pretty shocked. I think it was a stormy day—or it was at least overcast. So it had a very eerie feel to it that day.

Interviewer

Like apocalyptic?

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Isabelle

You could say that, yeah.

Interviewer

And you were just talking about your reaction. How were you feeling when that happened, when that email came through?

Isabelle

Um, I had mixed emotions. I, in some ways, was relieved because my exam that night was canceled. In other ways, I was freaked out because I was in charge of publishing this journal and I didn't know what the editorial process would look like if school remained canceled. On top of that, I was also afraid of contracting the virus or having one of my family members contract it. We didn't know anything about it at that point, or at least very little.

Interviewer

Yeah. Do you want to talk a little bit about how *ARCHIVE* first learned about that [ed. note: referring to the cancellation of classes]?

Isabelle

Yeah, we were having a meeting—I believe that same day—and we got news that campus was shutting down later that day. But we were in a meeting and we were discussing our travel plans to a conference at Northwestern. I mentioned offhandedly that we might not be able to go because it seems like things are shutting down—and this was right when NYU and Ohio State shut down. I didn't think our school would, given our track record with snow days.<sup>2</sup>

Interviewer

No kidding.

Isabelle

But then Professor Lapina mentioned that the conference would probably be canceled because of the virus, and everything else was getting canceled. I said, Okay, we should probably figure out how to meet online then next time. We formed some half-baked plan about getting on Skype or Google Hangouts.<sup>3</sup> That was that. We got the email [about classes moving online] after our meeting, so I

wrote to the editorial board saying that we'd be strategizing how to do the process online.

Interviewer

I remember all that.<sup>4</sup> Do you remember how the authors responded or how they felt when you got in contact with them? Did any people pull their papers?

Isabelle

A handful of authors did pull them. They struck me as being a bit panicky and also remorseful. You could tell that they didn't want to pull their pieces, but they knew they had to because they couldn't engage in the editorial process. And the authors that did stay on with us were very appreciative of the fact that we were still moving forward with publishing their pieces.

Interviewer

Okay, so there were a good amount of people ready to take on the new atmosphere, new editing process, et cetera, et cetera?

Isabelle

Yeah, they had a great attitude about it.

Interviewer

That's cool. How about the other editors? How did they respond to those new challenges?

Isabelle

I think everyone on the board, myself included, was very stressed out. We burnt out quickly when things shifted to online. I could tell that all my editors were stressed. It forced me to be very strategic about how I kind of brought them together as a team—just knowing that there wasn't a whole lot of enthusiasm, or maybe rather motivation, to finish this semester strong. We were all in the same boat.

Interviewer

I was in that boat too. That boat was—

Isabelle

It was brutal.



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Interviewer

I was on a life raft at that point. It was hard.

Isabelle

For me, as editor-in-chief, because there was a lot more disciplining in the job that was required of me after things went online and I didn't feel comfortable in that position, I ended up delegating much less than I otherwise would have.

Interviewer

I remember, and correct me if I'm wrong, being grateful to Professor Lapina for stepping up quite a bit. She did a lot when I was losing motivation.

Isabelle

Professor Lapina was extremely helpful when it came to strategizing and refining the pieces. We couldn't have done it without her.

Interviewer

Did you find difficulties with formatting and the InDesign<sup>5</sup> work later on in the semester?

Isabelle

Definitely. I ended up doing the entire thing myself from my laptop and teaching myself how to use InDesign. I actually thought that was one of the more fun aspects of the project, but it was definitely very tedious and time-consuming. It would've gone a lot faster if I had help but that was unrealistic given the isolation.

Interviewer

Yeah. At that time it was different than even this semester in *ARCHIVE* because, you know, we adapted to the circumstances in the fall semester. So this spring it's been easier to do everything, whereas when it first happened, I remember it being very confusing as to which direction we were going.

Isabelle

Yeah, especially because there wasn't a lot of clarity about how long it would last. Looking back, I can't believe we thought it would end so quickly, but there was definitely a sense that we could be back on campus before the semester ended. A lot of

people felt this would be something that the university would be able to kind of turn around quickly and obviously now we know that wasn't the case.

Interviewer

Can you maybe talk a little bit about how the rest of the semester went and any of the major publication decisions you made?

[Maybe] a little bit about how you chose the cover photo? I know we'd been talking about that on the board. Maybe how you chose to make some of those decisions?

Isabelle

Yes, so the cover—I wanted it to be reminiscent of the times. I had a different photo picked out before the pandemic hit and, when it did hit, we chose one that was representative of the fact that the campus was vacated.<sup>6</sup> So that's reflected in our cover photo. And I actually think that the timing worked out pretty well because when the pandemic hit, we had just had our final meeting establishing our table of contents. So the process did go relatively smoothly after that because we kind of had everything in place to just start down this path of pure editing. We got lucky there but the rest of the semester was pretty hard.

Interviewer

Yeah. In a way, it hit at a certain time where we had gotten some of the work done.

Isabelle

It couldn't have come at a better time. Let's just put it that way.

...

Isabelle

I remember when I submitted the journal to the department. It was the biggest sense of relief I've ever felt in my life.

Interviewer

Holy moly. Wow.

Isabelle

When I finally saw the journal printed in person, it was one of the more rewarding feelings of my life.

## Personalizing the Pandemic

Interviewer

Well, that's good. I'd like to give you a round of applause for doing all that.

Isabelle

Oh, thank you—

Interviewer

Same to Maddy, our current EIC [editor-in-chief], because she deserves it.

Isabelle

Maddy, she's doing a great job. Maddy was actually one of the people I really leaned on during the semester after campus shut down. She was so determined to be of help and she's such a talented editor. She really gave it her all even when everyone else was unable to do that.

Interviewer

Shout-out<sup>7</sup> to Maddy.

Isabelle

Shout-out to Maddy.

Interviewer

We've talked mostly about *ARCHIVE*, but do you just want to talk about your personal spring semester outside of the journal?

Isabelle

Yeah, that was a hard semester for me. Like I said, I was taking calculus for the first time—it was a very demanding course. It was also a really hard semester for me personally because I had a death in my family. So there was a two-, three-week period in the middle of the editorial process where I was down for the count because I was going through such a hard time. But I think that semester really taught me the necessity of managing your mental health along with all the other things students are forced to balance—like our physical health, our grades, our finances. I'm thankful for all the lessons I learned but it was definitely a hard time in my life.

## ARCHIVE

Interviewer

Yeah. It was a hard time in mine too. Is there anything else you want to talk about? Anything you think would be beneficial?

Isabelle

I do wish that we would have been able to get together at the end of the semester as a board and celebrate our accomplishments together. That was something that—I'm sad it didn't happen because I don't think that there was as much of a celebration as the accomplishment warranted. I would have loved to thank my board, all assembled together, and show them what the journal looked like. Maybe someday we'll be able to do that, when we're all alumni and can come back and afford a nice meal or maybe some champagne.

Interviewer

Do you have any advice for the current board going into the last part of the publication?

Isabelle

I would say have fun with it. Don't forget to give yourself credit. Tough love works up to a point, but you really have to love the process if you're going to love the final product.

Interviewer

Wise words, Isabelle. Thank you.

1. Fire is a colloquial term for something incredible or amazing.
2. UW–Madison is historically very conservative about cancelling classes for significant snowstorms.
3. Skype and Google Hangouts are video-chatting platforms.
4. Interviewer Alex Moriarty was also on the editorial board in the spring of 2020.
5. Adobe InDesign is the publication software used to create *ARCHIVE*.
6. Volume 23 of *ARCHIVE* featured a photograph of the Wisconsin Union Theater on the cover. The photograph was taken in 1948 on a day when the theater was empty.
7. Shout-out is an informal term used to express congratulations, appreciation, or support.

## Editors' Biographies

**Madeline Brauer** is a second-year student at UW–Madison studying history and economics. This is Madeline's second year on the *ARCHIVE* editorial board and her first year as editor-in-chief. Her primary area of academic interest is early modern Christianity, particularly the Protestant Reformation. She also enjoys examining early US history and the First World War. Madeline is still undecided about her post-undergraduate plans, though she is currently considering a career in secondary education. In the event that she selects this path, Madeline hopes to enter a post-baccalaureate teaching program and pursue a master's degree in the field of education.

**Julia Derzay** is a second-year student at UW–Madison studying history and economics. Her main historical interests include colonization in Southeast Asia and American interwar politics. This semester she embarked on her year-long senior thesis, which examines why the La Follette dynasty and their Wisconsin Progressive Party failed in the interwar period. Julia currently works for the UW Archives as well as the Congressional Correspondence Research team in the Political Science Department, gathering qualitative data on legislators' correspondence. Upon earning her bachelor's degree, she hopes to volunteer for the Peace Corps in the Philippines and then pursue a career in constitutional law at Georgetown Law School.

**Haley Drost** is a third-year student at UW–Madison studying history and classical humanities. Though interested in a wide range of historical topics, Haley particularly enjoys ancient history and Antebellum American history. Outside of school, she enjoys painting and playing the cello. She is still uncertain about her post-undergraduate plans but is entertaining the thought of graduate school.

**Taylor Madl** is a third-year student at UW–Madison studying German and history with a certificate in gender and women's studies. Her primary areas of interest are queer and feminist history pertaining to topics like urbanism, labor rights, and fascism in the twentieth century. She is also interested in contemporary art history and philology, particularly that of Germanic languages. Outside of her academics, Taylor is an avid reader, artist, and

amateur chef. Following graduation, she plans to move to Germany where she will likely pursue a graduate degree in history or museum studies.

**Thomas Miller** is a fourth-year student at UW–Madison majoring in history, Spanish, and Latin American, Caribbean, and Iberian studies. His main historical interests include nineteenth- and early-twentieth-century Latin America, with a particular focus on Central America and the process of nation-building that followed the independence of Latin American nations. Currently in his final semester at UW, Thomas is finishing his senior thesis on positivism and historical liberalization in nineteenth-century Guatemala. In his free time, he enjoys running, waterskiing, downhill skiing, and reading. Thomas will begin graduate school this fall at the University of Florida pursuing a PhD in History, specializing in nineteenth-century Central America.

**Alex Moriarty** is a third-year student at UW–Madison studying economics, history, and sociology. Although his historical interests mainly focus on LGBTQIA+ history, particularly the gay rights movement, Alex also enjoys studying East Asian history and general social movements across historical disciplines. With his senior year coming up, Alex plans to write a thesis on LGBTQIA+ history as it relates to underrepresented areas of social movements, especially civil rights and women's rights. Outside of school, he enjoys reading and writing, listening to and playing music, and spending time with friends and family. After graduation, Alex plans to take a two-year-long gap period to explore the world before hopefully attending law school.

**Evan Sadlon** is a fourth-year student at UW–Madison majoring in history and religious studies with a certificate in political economy, philosophy, and politics. His primary historical interest is the transnational relationship between Europe and the United States, particularly focusing on the rise and fall of global empires and modern foreign policy. Outside of his coursework, Evan has rowed for Wisconsin Men's Crew and worked as a tutor for students at Madison West High School. Following graduation, Evan plans to attend law school and ultimately join the US Navy's JAG Corps.

**Jeff Wang** is a third-year student at UW–Madison studying history and business. He is interested in Sino-US history, with a particular focus on mapping the Chinese immigrant experience in the post-Civil War American South. Following his undergraduate studies, Jeff hopes to attend law school to pursue a career in business law. Outside of the classroom, Jeff loves experimenting in the kitchen and playing for the Wisconsin Men's Rugby team.

**Andrew Wheat** is a fourth-year student at UW–Madison triple majoring in English literature, history, and journalism. His main historical interest is US history, particularly the twentieth century, as well as intellectual history. Following his graduation, Andrew is planning to pursue a PhD in English Literary Studies.



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