

# Beyond Boundaries

MASTERING  
THE  
LIBERAL  
ARTS

**Volume 5, Fall 2025**

# Beyond Boundaries: Mastering the Liberal Arts

Issue 5, Fall 2025

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Beyond Boundaries would not be possible without the hard work and dedication of our Faculty Sponsor Professor Catherine Clinton. We greatly appreciate all her support and tireless efforts.

## Letter From the Editors

Dear Readers,

We are very pleased to bring you this 5<sup>th</sup> Edition of *Beyond Boundaries: Mastering the Liberal Arts*. Once again, this peer-reviewed academic journal showcases the quality and variety of the scholarship of the University of Texas at San Antonio's College of Liberal Arts graduate students.

This edition in particular features new categories of contributions, including those from the Department of Music and an ArcGIS digital history project. We are extremely proud of the diversity of scholarship represented in this edition and extend grateful thanks to Dean Glenn Martinez, Ph.D. and the Graduate Advisors from each department for their support and encouragement of these research submissions.

Our excellent Peer Reviewers, Jennifer Campbell, Gavin Morris, Josie Barrett-Silguero, and Sophia Mendez graciously offered their time and expertise to help improve these submissions and this edition: to you four, we are deeply indebted.

Lastly, we extend special thanks for the tireless sponsorship and help of Dr. Catherine Clinton, to whom we as Editors and this journal are extremely grateful.

We offer congratulations and thanks to all our authors for their outstanding submissions – read on and experience the best of UT San Antonio's COLFA!

With sincere appreciation,

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# **MujerArtes Clay Cooperative: Continuing Culture and Heritage Through Clay**

By: Rebecca Bricker

Department of Art History

## **Abstract:**

*The West Side Community of San Antonio, Texas, faces encroaching gentrification that threatens residents with displacement and disbursement of families. The Esperanza Center for Peace and Justice offers events and community programs that inform, educate, and empower the community to advocate for themselves and continue cultural traditions. The MujerArtes Clay Cooperative is one of the programs through which women of the community learn ceramics and other art forms that tell the stories of the women, community, and culture of the West Side. The Cooperative empowers immigrant and marginalized women through this creative outlet that provides materials, education, and opportunities to show their artwork.*

The Westside of San Antonio emerged in response to systemic segregation, as Mexican Americans were pushed out of the city into areas separate from the white population. In the 1800s, as white settlers moved into the area, Mexican American landowners lost wealth and property. By the early 20th century, the Westside grew quickly as Mexican immigrants fleeing the Mexican Revolution joined the already established Mexican American community. In the 1930s, banks “redlined” the Mexican American and Black communities, which made it hard for them to obtain mortgages to purchase or build homes. The San Antonio Housing Authority constructed public housing to accommodate the increasing population, though the area was provided with minimal infrastructure and public services. Despite these hardships, residents built a strong, self-reliant community rooted in mutual support and cultural resilience.

“Growing up in the West Side during the 50s in an area known as Saca Tripa: It was great... We had like the extended family. My parents knew everybody in the neighborhood. You would be outside all the time. You knew every person. You knew they would look out for you and get after you... I did not know I was poor then though... You were among *familia*, and by *familia* I don’t mean your blood relatives. The united people and the way they are lent to that security.”

— *Enedina Casarez Vasquez*, 2003 (Marquez, 2007)

By the 1960s, the Westside community began to organize and advocate for their civil rights, contributing to the momentum of the Chicano Civil Rights Movement. That legacy of resistance continues today as residents confront new threats to their homes and identity, including gentrification, displacement, and deportation.

Out of this spirit of activism and commitment to social justice, the Esperanza Peace and Justice Center was founded in 1987. Guided by a mission to serve as a space for diverse subcommunities and political causes, the Esperanza seeks to “preserve and promote artistic and cultural expression” within San Antonio’s Westside and beyond (DeTurk, 9). The organization facilitates community awareness and engagement, as well as historical preservation through artistic programs and events such as exhibitions, concerts, workshops, and oral history projects. One of its

long-running initiatives, the MujerArtes Clay Cooperative, exemplifies how the Esperanza supports cultural expression and artistic empowerment within the local community.

Established in 1995, the MujerArtes Clay Cooperative is housed within the cultural hub of Rinconcito de Esperanza. The cooperative offers a collaborative and educational space where women from the community create ceramic artwork that reflects their lived experiences, honors the cultural history of San Antonio's Westside, and celebrates Mexican American identities. Members engage in teaching, learning, and artistic production, using clay as a medium to express personal and collective narratives. By empowering women to articulate their histories and cultural perspectives through art, MujerArtes has become a vital part of the Westside's cultural landscape.

Working in tandem with the Esperanza Peace and Justice Center, MujerArtes promotes cultural preservation and community-based arts activism. In the face of ongoing threats such as gentrification, displacement, and systemic inequality, the cooperative plays a critical role in sustaining community memory and heritage. With many members having participated for over a decade or more, engaging and mentoring the next generation of women artists remains a key priority for the cooperative's continued impact.

Created by and for women from San Antonio's Westside, MujerArtes operates as a true cooperative, in which members manage and operate the collective themselves. Interviews with Esperanza Peace and Justice Center director Graciela Sánchez and members of MujerArtes highlight the cooperative's cultural and social significance. As the only all-women, women-managed clay cooperative in the United States, MujerArtes stands apart. Other clay collectives tend to be co-ed, male-owned, or affiliated with academic institutions, making MujerArtes a unique and vital space in both the local and national art landscapes.

The cooperative brings women together across differences in background and personal history, united by shared cultural identity and heritage. Though they join the studio for various

reasons, whether seeking healing, empowerment, or artistic growth, they collaborate in learning and creating to tell stories from the Westside and the broader Chicana/Mexicana experience.

As MujerArtes celebrates its 30th anniversary in 2025, it maintains a core group of longtime members while also welcoming new participants. Members receive hands-on training and act as both students and teachers, participating in workshops at the MujerArtes studio and other locations, such as New Mexico. The cooperative holds annual exhibitions at its studio and at the Esperanza gallery, taking part in community events such as Día de los Muertos and Mercado de Paz. Their work has been featured regionally and internationally, including California and Mexico. Blending traditional Mexican and Chicano motifs, their ceramics continue the legacy of cultural storytelling and historic preservation through art.

The exhibition, *Árboles de Vida del Westside* (September - November 2023), featured ceramic trees created at the cooperative studio.

“Árboles de Vida del Westside represents stories of our people and reaffirms that our culture is important. For us, the women of MujerArtes Clay Cooperative, the Trees of Life from the Westside represent anecdotes about our people, our traditions, our artists, our activists and our celebrations. The trees of life show the everyday life of the neighborhood and remind us of special places and family moments. These árboles reaffirm that our culture is more alive than ever before with deep and strong roots.”  
([esperanzacenter.org](http://esperanzacenter.org))

The trees on display at the MujerArtes Studio showcase the distinct styles and cultural expressions of each artist. Varying in sizes, each tree is intricately detailed. The clay trees are brightly painted with acrylic paint and adorned with handmade clay elements such as flowers, leaves, birds, and figures. Some reflect biblical narratives such as the Nativity or the Virgin of Guadalupe. Others display landmarks or memories of the Westside Community.





MujerArtes *Árboles de la Vida*  
Photos courtesy of Rebecca Bricker.

The *árbol de la vida* (Tree of Life) has origins in traditional Mexican ceramics that date back to pre-Columbian times. During colonization, Spanish priests sought to convert Indigenous populations by eradicating imagery of pre-Columbian deities and replacing them with Christian iconography. (AMOCA) From this fusion of Mesoamerican ceramic traditions and Spanish Catholic influence, the *árbol de la vida* emerged as a visual tool utilized for educational and conversion purposes. Elaborate in design, these trees were used to convey Christian narratives, as “paintings and visual arts played a vital role in the conversion project as friars realized the power that images held to communicate ideas that eluded verbal description or were enhanced by visual expression.” (Mulryan, 40)

The art form is most associated with three regions in Mexico: Izúcar de Matamoros, Acatlán de Osorio, and Metepec. Within these communities, the tradition has been passed down through

generations of artisan families, though recognition has often been given to the men while women were largely relegated to supporting roles. (Mulryan, 64). One of the most influential artists of this tradition, Herón Martínez of Acatlán de Osorio, gained international recognition for incorporating scenes of daily life alongside religious narratives in a whimsical, expressive style. His work was featured prominently during the 1968 Olympics in Mexico City, which helped bring international attention to the *árbol de la vida*.

Over time, the trees have evolved to include folkloric and cultural themes depicting everyday life, and festivals in addition to religious motifs and icons (Catholicism, the Virgin Mary or La Virgen de Guadalupe). Veronica Castillo, one of MujerArtes' coordinators, is from Izúcar de Matamoros. She shared the tradition of the trees of life. The women called Veronica's father and asked permission to use the *arbol de vida* when they first incorporated this imagery into their work. MujerArtes continues this tradition through their *Árboles de Vida del Westside*, infusing each piece with personal narratives and the cultural heritage of San Antonio's Westside community.

The *Nichos y Dichos* exhibit (September–October 2024) celebrates two intertwined Mexican traditions: nichos (devotional niches) and dichos (proverbs or sayings). Nichos are small, portable, handcrafted boxes used in Mexican Catholic devotion, taken from the iconography of European Catholicism. Typically made from found objects, nichos often feature images of saints and other sacred figures. However, Michael Riley argues that “nichos exist as a popular cultural expression” in contemporary Chicano art. (Riley, 214) Dichos are wisdom sayings that “reveal beliefs and values shared by most individuals in the community, based on past experience and social history” (Espinoza-Herold, 264). For *MujerArtes*, these two traditions converge in *Nichos y Dichos*, where artists craft nichos out of clay, integrating visual symbolism and text to represent each dicho. The resulting pieces are vibrantly painted and intricately detailed, offering layered representations of cultural identity, spirituality, and collective memory.



*MujerArtes Nichos y Dichos*  
Photo courtesy of Rebecca Bricker.

Every exhibit brings awareness to community issues and celebrates the history of the Westside community. Poverty, gentrification, and housing displacement are a few of the issues the people face. Despite the efforts to push people out of the area, some people fight for their culture and identity to remain strong and celebrated. MujerArtes works to continue the concepts of identity, memory, and cultural heritage within the community.

Michelle Bastian discusses community in terms of time and space. Time as a social construct places limitations on society and people groups. Communities usually hold to a framework of linear time that dictates how society operates. This framework leads to categories that simultaneously restrict people and communities from being more than one thing. In this, she explains that social constructs like time create avenues for historical detachment. In other words, the more time passes after a certain event or period, the more we collectively detach ourselves from it. “These techniques of temporal distancing thus limit who is considered to be coeval with a particular group and consequently limit how the community may be constituted.” (Bastian, 161) Changes and processes such as gentrification and displacement lead to temporal distancing and altering of the community dynamics thus leading to a type of forgetting of what was in the past.

This is why it is important for organizations like the Esperanza and its programs to keep social justice and cultural heritage awareness at the forefront. Society's reliance on linear time divides its attention to a limited number of focal points. Bastian looks to Gloria Anzaldúa's ideas on how time can be more than linear. Contradictions of time can coexist where society can be historical as well as present. She explains that Anzaldúa "affirms and recognises...contradictory historical trajectories simultaneously." (Bastian, 158) Using this framework, looking at the artwork of MujerArtes and the telling of histories and experiences is allowing time to be more than linear, to exist simultaneously.

Simultaneity allows for differences to coexist at the same time and space. The cooperative brings together women who share culture and community while honoring the uniqueness of their individual experiences and backgrounds. It creates a space where each woman can express her personal story through her work, while also collaboratively reflecting the collective narrative of their community and the broader Mexican American experience. This simultaneity is reflected in their exhibitions, where artworks often share common themes or designs, yet each piece also showcases the distinct style and authorship of each artist.

In speaking with the artists, they pride themselves in creating their art exclusively by their own hands. They do not use tools to help them mass-produce their work. It is important to them that their art is unique and specific to them as artists and to the Westside community. They know that art is one of the modes through which the community continues to retain its cultural identity. They feel that the relationship between the community and MujerArtes is important for the present as well as the future.

When asked what they value most about the cooperative, the resounding answer is belonging to the community and learning skills that empower their creativity and agency. For them, the cooperative is a space where individuals with diverse backgrounds, beliefs, and ideas come together

with a shared purpose as artists committed to cultural expression and social justice. They find strength in their differences, united by a common goal to create meaningful art. They also appreciate the opportunities the cooperative provides to learn from one another, gain new skills, and gain empowerment through collective growth and support. They value a space that allows them to express their creativity.

MujerArtes Clay Cooperative is more than a clay cooperative, it is a living archive of cultural memory, resistance, and empowerment located in San Antonio's Westside. Through its collaborative model, the cooperative challenges historical erasure and resists the forces of gentrification and systemic marginalization. Its members, many of whom have been part of the collective for years, use clay not only as a medium of artistic expression but as a tool for storytelling, healing, and reclaiming space.

By honoring the lived experiences of Chicana and Mexican American women, MujerArtes offers a counter-narrative to dominant histories and affirms the importance of place, identity, and cultural continuity. In doing so, it fulfills the mission of the Esperanza Peace and Justice Center: to preserve and promote cultural expression as a form of resistance and transformation. As MujerArtes celebrates its 30th anniversary, its work remains important through creating space for belonging, shaping a collective future, and ensuring that the stories of the Westside continue to be told, in clay and in community.

### **Artists of MujerArtes**

Yesenia Ramos, 20, joined *MujerArtes* in July 2024 as its youngest and newest member. An aspiring tattoo artist, she brings her drawing skills into clay work, fusing her personal style with the cooperative's traditions. She values the mentorship from more experienced members and appreciates the support *MujerArtes* and Esperanza provide her family, both financially and emotionally. She hopes to inspire younger women to join the cooperative, continuing its legacy of empowerment and cultural preservation.



Yesenia Ramos artworks left to right: ink on paper drawing, Frida Kahlo ceramic tile, ceramic bowl in process; photos courtesy of Rebecca Bricker.



Adriana Netro joined in February 2017 while grieving the loss of her partner. She found healing through the cooperative's creative environment, which fosters both independent exploration and shared learning. Through her work in clay, she expresses her emotions and ideas, while also gaining technical skills that she now applies to her personal projects. For her, *MujerArtes* is a space of healing, connection, and community engagement.



Adriana Netro works on a cactus candle holder. Photo courtesy of Rebecca Bricker.

Ana Uviedo, the longest-standing member, has been part of *MujerArtes* since 2004. Known for her distinctive style and narrative-driven clay pieces, she takes pride in her contributions to collaborative projects like the large *Árbol de la Vida* in San Antonio, where she recreated her grandmother's store. She continues to expand her skills through workshops, including in New Mexico.



Ana Uviedo displays some of her work: ceramic roses, ceramic tile for the *Loteria* series, in-process Lady of Guadalupe. Photos courtesy of Rebecca Bricker.

Rosa Vega, current coordinator of the cooperative, has been with *MujerArtes* since 2011 and stepped into her leadership role in 2018. She sees the cooperative as essential for preserving cultural history for future generations. Committed to her role, she ensures the smooth operation of the studio and supports its mission of community-based arts activism.



Rosa Vega in the *MujerArtes* studio, Frida Kahlo ceramic tile by Rosa Vega. Photos courtesy of Rebecca Bricker





Juana Hilda Ruiz joined in 2010 and will mark her 15th year with the cooperative in 2025. Introduced by a friend, she remains dedicated to the group and values its impact on the Westside community. She enjoys creating art that resonates with others and feels the cooperative plays a crucial role in uplifting the neighborhood.

Mary Agnes Rodriguez, an established San Antonio artist known for murals and paintings, joined *MujerArtes* in 2018. Through her art, she advocates for social justice, tells the stories of the Westside, and raises awareness of local issues. Her work within the cooperative deepens her commitment to activism through cultural expression.



Mary Agnes Rodriguez works on a graphic design for Esperanza Peace and Justice Center.  
Photo courtesy of Rebecca Bricker.

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# Voice Teaching Methods: What Mathilde Marchesi, Turkish Classical Music, and United States Music Conservatories Have In Common

By: Alexis Cairy  
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## Abstract

*The history of vocal pedagogy has greatly informed current teaching practices of Western Classical Music. This paper compares the relationship of the teaching methodologies of the Garcia-Marchesi method, global teaching, with a primary focus on Türkiye and the United States, and the modern elements of teaching in America, particularly group teaching.*

*The modern understanding of current vocal pedagogy and voice science can be traced back to Manuel Garcia II, the father of vocal pedagogy and the inventor of the laryngoscope, and the students he produced as both singers and teachers. A student of Garcia's, Mathilde Marchesi, is also considered as one of the best historical pedagogues. Marchesi had an innovative approach for her studio teaching based on Garcia's training strategies for the voice, but not necessarily following his model of one-on-one lessons. A concert class, an opera class, or a methodology class is what Marchesi offered in her private teaching studio. In these three classes, Marchesi would teach in a group setting and encourage students to write and observe.*

*The model of teaching Marchesi used was not necessarily new from a global perspective of music and teaching. Global voice pedagogy systems, including Turkish Classical Music's system of teaching, called Meşk, also has the master-apprentice relationship with group teaching elements. The elements of group teaching in the Meşk education system are similar to the methodology that Marchesi developed and what was formed in the United States of America through group teaching methods and non-Western classical music scenes.*

## Introduction

The singing teaching prevalent in modern-day voice pedagogy classrooms developed largely due to Mathilde Marchesi. Marchesi, a German-born mezzo-soprano, taught singing in Vienna and Paris in the late nineteenth century. Her methodology of group teaching has been taken and utilized in historical and modern American university and collegiate settings. In Marchesi's method of group teaching, one-on-one lessons were performed in a group setting with each student rotating from taking notes on each other's lessons to then taking a lesson themselves.<sup>1</sup> While this method was unique in content to her, it is not unique in terms of musical practice cross-culturally.<sup>2</sup>

Other world music practices have models of group teaching for instrument and voice.<sup>3</sup> One such place is Türkiye. With its adjacent features to Western classical musical practices, Turkish Classical Music, has a structure in which the education of music models centers more around a master-apprentice relationship, called Meşk. Additionally, there are elements of group teaching for performance practice that are more widely taught in music conservatories as well.<sup>4</sup>

The United States also offers voice teaching methods that are not rooted in Western classical style, but rather carry on traditions from multiple cultures in which group teaching is present.<sup>5</sup> This can be seen in Folk music traditions, and even in modern application of popular culture music where the transmission of music is through group teaching methods.<sup>6</sup>

In this article, I will compare the teaching methodology found in the Marchesi method with that seen in Türkiye and the United States, especially American group teaching.

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<sup>1</sup> Roger Neill, *Divas: Mathilde Marchesi and Her Pupils* (Sydney, New South Publishing, 2017), 316.

<sup>2</sup> Yang, Yang, Aaron Carter-Ényì, Nandhakumar Radhakrishnan, Sophie Grimmer, and John Nix, "37 Vocal Music and Pedagogy of Chinese, African, and Indian Genres." Essay. In *The Oxford Handbook of Singing* (Oxford University Press, 2019), 751–67

<sup>3</sup> Ibid., 760.

<sup>4</sup> Denise Gill-Gürtan, "Melancholic Modalities: Ottoman Music and the Turkish Nation-State", Chapter 1 in *Melancholic Modalities: Affect, Islam, and Turkish Classical Musicians*. (Oxford University Press, 2017), 26-57.

<sup>5</sup> Yang et al., "Vocal Music and Pedagogy of Chinese, African, and Indian Genres", 765; Lisa Joy DeRosia, "Singing and Learning Together: Strategies for Cultivating Joyful and Inclusive Group Voice Classes", Dissertation, ProQuest LLC, 2024.

<sup>6</sup> Yang et al., "Vocal Music and Pedagogy of Chinese, African, and Indian Genres", 765; DeRosia, "Singing and Learning Together", 5.

## Section 1: A Brief History of Classical Vocal Pedagogy

The master-apprentice model of singing education, while having been practiced for centuries, remains prominent today in conservatory music settings. Our current understanding of the model comes from the European guild system of the late Middle Ages.<sup>7</sup> The master-apprentice model includes a teacher-centric model that grounds the teacher (master) as the infallible knowledge source in the education of the student (apprentice).<sup>8</sup> This master-apprentice model characterized vocal schools in the eighteenth and nineteenth centuries and reflected other teaching trends in society.<sup>9</sup>

There was a close relationship between the teacher and student and the student would become integrated into the teacher's life in all aspects. The student would live in the master's home, with the master becoming a pseudo-parent, *in loco parentis*, and learn their craft through this integration into the lifestyle of the artist. In turn, the master had a large responsibility in crafting not just the career of the apprentice, but the knowledge, history, morality, and religious ideology of the student. Likewise, this system of relaying tradition and vocation ultimately was deemed an ordinance from God to be the master of the life of these students.<sup>10</sup>

The tradition of this intense master-student relationship inherited by Marchesi held deep roots in European musical instruction. Italian eighteenth century voice pedagogue and Singing Master of the Imperial Court of Vienna Giambattista Mancini (1714 – 1800), reflected on the experiences of his teacher, fellow Italian Antonio Bernacchi (1685 – 1756) who always:

“undertook his difficult task bravely, willing to study the necessary length of time as the rules of his teacher required. He never missed his daily lesson to avail himself of his teacher's advice. During this time of his study, he not only refused to sing in any of the

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<sup>7</sup> Travis Sherwood, “Evolving the Master-Apprentice Tradition: A Pathway Back to a Student-Centered Pedagogy”, *Journal of Singing*, vol 80, no. 1 (August 15, 2023): 13–22.

<sup>8</sup> Sherwood, “Evolving the Master-Apprentice Tradition”, 13; Brian Manternach, “Master of None: Challenging the Master-Apprentice Model” *Journal of Singing* vol 80, no. 4 (March 2024) 54.

<sup>9</sup> Manternach, “Master of None: Challenging the Master-Apprentice Model”, 54.

<sup>10</sup> Sherwood, “Evolving the Master-Apprentice Tradition”.

churches and theatres but even refused to sing for his most intimate friends. He continued living this way, until his teacher gave him permission to do otherwise, and at that time he startled the world with his art.”<sup>11</sup>

This traditional voice pedagogy model remained based on the students’ respect for and complete reliance on their teachers’ judgment. Today, modern voice professionals continue a reciprocal sense of responsibility for the best interests of their students. Nevertheless, the model that has become more prevalent over the recent two decades has been moving from all-knowing teacher-centric to student-centric and to individualized learning styles.<sup>12</sup> In the modern applicability of this method, the teacher and student have a one-on-one lesson at least once a week with the teacher instructing and guiding the progress of the student. While there is less emphasis on the depth and significance of moral guidance, modern voice professionals retain a duty to their students to do what is best for them.

To gauge further historical understanding of voice teaching models, the next section examines the history of the evolution of these traditional master-student methods, which eventually developed into the Bel Canto method.

### **1.1 Manuel Garcia II: Introduction and Methods**

The modern understanding of current vocal pedagogy and voice science can be traced back to Manuel Garcia II (1805 – 1905). Garcia, who lived and taught in France during the mid nineteenth century, featured prominently as a professor in the prestigious Paris Conservatoire. He is now considered as the father of vocal pedagogy and had great influence both personally and through his students’ later accomplishments. Garcia was first and foremost a legendary Bel Canto teacher and then subsequently the inventor of the laryngoscope.<sup>13</sup> Garcia’s major work, *Traité complet de*

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<sup>11</sup> Giambattista Mancini, *Practical Reflections on the Figurative Art of Singing* (The Gorham Press, 1912); Sherwood, “Evolving the Master-Apprentice Tradition”, 15.

<sup>12</sup> Manternach, “Master of None: Challenging the Master-Apprentice Model”, 448.

<sup>13</sup> James A Stark, *Bel Canto : A History of Vocal Pedagogy* (University of Toronto Press, 1999), 4.

*l'art du chant*, was written between 1840 and 1847. This work became part of the standard literature of voice instruction for many years.<sup>14</sup>

The main theories that Garcia developed were the Theory of Glottal Closure and the Coup de la glotte.<sup>15</sup> While the Coup de la glotte proved to be the most controversial of Garcia's theories, both theories took hold in the voice teaching world.<sup>16</sup> Garcia's work greatly impacted vocal pedagogy history and methods.

## **1.2 Manuel Garcia II and Mathilde Marchesi's Relationship**

During Garcia's Professorship at the Paris Conservatoire (1847 - 1850), he mentored perhaps his most famous student, German mezzo soprano Mathilde Marchesi (1821 – 1913). Although brief, this teacher-student relationship proved to be highly consequential in forming Marchesi's future teaching methods.<sup>17</sup> After her time learning from Garcia and serving as his assistant, Marchesi progressed as teacher in her own right, and went on to host her own private teaching school in Paris, École Marchesi beginning in 1877.<sup>18</sup>

## **Section 2: Mathilde Marchesi and Her Teaching**

The pedagogical methods of the Bel Canto period and the birth of voice science led to a flourishing of classical voice teaching through group methods like that of Mathilde Marchesi.<sup>19</sup> Lisette Sophie Jeannette Mathilde Graumann was born in Frankfurt, Germany on March 24th, 1821.<sup>20</sup> She would later become known as the mezzo soprano Mathilde Graumann until she married Salvatore Marchesi in 1852 at the age of thirty-one, taking his surname Marchesi.<sup>21</sup> Marchesi was a

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<sup>14</sup> Stark, *Bel Canto*, 4.

<sup>15</sup> Stark, *Bel Canto*, 11

<sup>16</sup> Stark, *Bel Canto*, 12

<sup>17</sup> Berton Coffin, *Historical Vocal Pedagogy Classics* (Scarecrow Press, 1989).

<sup>18</sup> Neill, *Divas*.

<sup>19</sup> Ibid, i.

<sup>20</sup> Neill, *Divas*, 40.

<sup>21</sup> Mathilde Marchesi, *Bel Canto: A Theoretical & Practical Vocal Method: Mathilde Marchesi*, (Dover Publications, 1970), ii.



stringent teacher who gave up her performing career in pursuit of teaching. Marchesi worked for several conservatories, including the Paris Conservatory, the Vienna Conservatory, and the Cologne Conservatory.<sup>22</sup>



Figure 1. Mathilde Marchesi<sup>23</sup>

Her methodology primarily consisted of exercise regimens and highly considered scaffolding whose objectives were a healthy progression for her students' voices. By modern standards, Marchesi's disciplined instruction may seem excessive; however, when now considering current science principles regarding general health, Marchesi's recommendations made prescient sense. For instance, she recommended that her students avoid activities late at night, singing too

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<sup>22</sup> Marchesi, *Bel Canto*, ii.

<sup>23</sup> Neill *Divas*, 311.

soon after meals, exposure to excessive heat or cold, and too frequent social events. Marchesi advised against these as she believed they could cause adverse reactions in the singer's body impacting the ability to sing properly.



Figure 2. Mathilde Marchesi and daughter Blanche Marchesi <sup>24</sup>

Marchesi was particular about the placement of the voice and how much the student should be utilizing their voice.<sup>25</sup> Marchesi believed that there was a benefit to her students to sing limited passages a day, consisting of five to ten minutes of slow, long, sustained lines. This was also her intention to safeguard voices from excessive use and to promote the nurture and care of the voice.

She was also a firm believer in her students' understanding of the anatomy of singing and how vowels were the foundation for proper singing.<sup>26</sup> Her step-by-step approach for singing placed

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<sup>24</sup> "Blanche Marchesi, Soprano," Great Singers of The Past, August 19, 2016, <https://greatsingersofthepast.wordpress.com/2012/08/30/marchesi-blanche-soprano/>.

<sup>25</sup> Neill, *Divas*, 310.

<sup>26</sup> Neill, *Divas*, 311.

one obstacle in front of a student at a time. Additionally, she emphasized the importance of not letting a student stop studying with her before they were ready.<sup>27</sup>

Marchesi's group classes were another method for her students to observe singing. Students had time to observe their peers and to listen to the individual instruction that Marchesi would give each singer. Her instruction to one student often applied to the other students who then implemented the lessons into their work as well. Her four different courses were organized so that two were beginning courses for students, with the next level either a concert work class or an opera work class. In these upper-level courses, the student would focus on skills for concert or operatic singing. Marchesi believed that when a student left her instruction that they could excel as an opera singer, a concert singer, or a teacher.<sup>28</sup>

Soprano student Betty Brooke reflected about Marchesi's scheduling of classes and the daily work she expected from her students. Brooke observed that Marchesi was punctual to start the teaching day at nine o'clock in the morning every morning, and that Monday, Wednesday, and Friday mornings focused on opera work. Students were expected to observe and listen to their peers' singing. In addition to class sessions, students took lessons three times a week, usually on Tuesday, Thursday, and Saturday mornings.<sup>29</sup>

Singing exercises known as vocalises were foundational for Marchesi in her instruction. She focused on creating vocalises that were sustainable, achievable, and manageable for encouraging each student's progression. These extensive vocal exercises included executing chromatic slurs, diatonic slurs, portamenti, scales for blending of the registers, exercises on two notes, exercises on three notes, chromatic scales, minor scales, flexibility, repeated notes, triplets, arpeggi, and others. All of these Marchesi believed to be important regarding the foundation of the voice and its

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<sup>27</sup> Neill, *Divas*, 312.

<sup>28</sup> Kandie K Kearley, *A Bel Canto Tradition: Women Teachers of Singing during the Golden Age of Opera*, (1998).

<sup>29</sup> Neill, *Divas*, 318.

progression in a healthy and nurturing way.<sup>30</sup>

The care with which Marchesi taught is perhaps no more evident than in her writing about the three registers of the female voice: chest, mid voice, and head voice.<sup>31</sup> Marchesi was insistent regarding this three register model which remained a continual theme in her writing.<sup>32</sup> She wrote that the voice should be trained for months before being given arias or songs so that the registers can be maneuvered more cleanly. This resulted in what she characterized as a silvery quality, which exhibited flexibility and a seemingly effortless character.<sup>33</sup> Marchesi pointed out the potential singing voice flaws created by ignoring her three register model. She theorized that singers who worked on their high ranges while ignoring their chest voice were often left with holes or gaps throughout their registers.<sup>34</sup>

Marchesi's methods focused on practical applications which focused on the singer's progress. Exercises to improve technique and to create longevity in the voice were the prominent factors throughout Marchesi's group classes and one-on-one lessons.<sup>35</sup>

### **Section 3: Türkiye and its Music and Pedagogical Systems**

The country of Türkiye, due to its unique position geographically between the Mediterranean Sea and the Black Sea, has experienced many different influences from both the eastern and western worlds. While the complete history of Türkiye is too extensive for this writing, a brief understanding of the Ottoman Empire will help contextualize the music of the country.

The Ottoman Empire existed for close to six hundred years before its dismantlement in 1922

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<sup>30</sup> Mathilde Marchesi, *Ten Singing Lessons, Vol. 1*, (Harper, 1901).

<sup>31</sup> Kearley, *A Bel Canto Tradition*, 62.

<sup>32</sup> Ibid., 62.

<sup>33</sup> Ibid., 58.

<sup>34</sup> Marchesi, *Ten Singing Lessons*, 25.

<sup>35</sup> Kearley, *A Bel Canto Tradition*, 64; Blair, Kirsten A. "The Individual Singing Voice in the Studio and Classroom: An Inclusive eBook Design for Beginning Singers and Their Teachers", Thesis, U.M.I, 2022.

resulting in the new Republic of Türkiye led by Mustafa Kemal Atatürk.<sup>36</sup> During the prime of the Ottoman Empire, its geographical borders expanded as far into modern Europe as Vienna, Austria.<sup>37</sup> In North Africa, it extended as far west as Algiers and as far east as the Arabian Peninsula.<sup>38</sup> Due to the geographical extent, it cannot be defined as one culture. Because of this, the music of the Ottoman Empire was just as culturally expansive and rich in history.

Music education during the Ottoman period and before the establishment of the Republic of Türkiye education systems was based on the Ottoman's elementary-primary schools and *madrasahs*, a pre-Ottoman school that would later be associated with Islamic mosques.<sup>39</sup> Palace and hall music was exclusive to the individual palaces that were scattered around the Ottoman Empire.<sup>40</sup> Religious music was in the mosques and Dervish lodges, which were a musical sect of Islamic practice.<sup>41</sup> There was music for occupational organizations, educational music found in educational settings such as *madrasah* and *enderun*, which were the separate schools set up in sultans' palaces.<sup>42</sup> Lastly, city entertainment music and military music were known as Janissary music.<sup>43</sup> These varied music traditions contributed to the development and sustaining of the *Meşk* system of education.<sup>44</sup>

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<sup>36</sup> Philips Price, "Chapter XI: Foundation of the Republic-Constitutional Changes and Dictatorships", essay, in *A History of Turkey: From Empire to Republic*, (Routledge, 2021), 126–34.

<sup>37</sup> "Ottoman Empire." Encyclopædia Britannica, April 29, 2025. <https://www.britannica.com/place/Ottoman-Empire>.

<sup>38</sup> Ibid.

<sup>39</sup> Koray Celenk, "Establishment Aim and Present Situation of the Institutions Giving Professional Music Education in Turkey", essay, in *Music and Music Education From Ottoman Empire to Modern Turkey*, (AGP Research, 2016), 54–64; Ihsanoglu Ekmeleddin, "The Madrasahs of the Ottoman Empire", *Foundation for Science Technology and Civilisation*, April 2004.

<sup>40</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 56.

<sup>41</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 56; Yücer Hür Mahmut, "Dervish Lodges and Convents in the History of Social Services", *Akademik Platform İslami Araştırmalar Dergisi* 6, no. 1 (April 8, 2022): 19–34.

<sup>42</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 57; "Enderun Tureng". Accessed May 10, 2025. <https://tureng.com/en/turkish-english/enderun>.

<sup>43</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 55.

<sup>44</sup> Ibid., 56; Denise Gill-Gürtan, "Performing *Meşk*, Narrating History: Legacies of Transmission in Contemporary Turkish Musical Practices." *Comparative Studies of South Asia, Africa and the Middle East* 31, no. 3 (December 1, 2011): 615–30.



Figure 3: Map of the Ottoman Empire <sup>45</sup>

### 3.1 Meşk

Meşk is the system in which the master-apprentice relationship developed in Türkiye during the Ottoman Empire. The Ottomans considered music to be part of a system that valued instruction from a master to a handpicked apprentice. Meşk is not just about the transmission of music: it is about the teaching of music in an atmosphere where the master can instill into the apprentice not only the education of music but the education of a philosophy of life.<sup>46</sup> Similarly, when it comes to the actual teaching of the music, there is an intentional connection that the master and apprentice must make.

Outside of Enderun and the Dervish lodges, Meşk instruction took place in the private home of the master.<sup>47</sup> The apprentice was expected to go to the master's house daily for lengthy lessons. The years of training expected of a student varied based on the individual apprentice's needs and the

<sup>45</sup> "Ottoman Empire." Encyclopædia Britannica, April 29, 2025. <https://www.britannica.com/place/Ottoman-Empire>.

<sup>46</sup> Şebnem Özdemir Sozer, "Discovering One's Self through Embodiment of Tradition in Meşk: An Analysis of the Mode of Transmission in Turkish Performative Traditions." *Musicologist* 3, no. 2 (December 31, 2019): 146–64.

<sup>47</sup> Yücer, "Dervish Lodges", 19–34.

type of repertoire being transmitted.<sup>48</sup> Because of this student-centered view, and varying duration, Meşk cannot be considered a standardized pedagogical system with a fixed schedule for completing different levels of training.<sup>49</sup>

The structure of this system consisted of a face-to-face form of education where the student would sit in front of their teacher to understand, assimilate, and interpret what the master did, said, and read.<sup>50</sup> Then the apprentice would mimic this. Oral transmission rather than notation was the primary method for learning music.<sup>51</sup> Meşk functioned not only in one-on-one settings but also could be accomplished in a group setting with the master's other students.<sup>52</sup>

The master-apprentice (*utsa-çırak*) relationship between teacher and student was a long-term learning process.<sup>53</sup> However, this relationship did not start one-on-one, but rather began with a small group of students, usually as children.<sup>54</sup> Likewise, having a talent or an affection for music was not the only factor to determine if a child could qualify to receive training from the master; rather, the potential student's character, manners, and familiarity with the ethics integrated into Meşk were also important considerations.<sup>55</sup>

Before going further, a list of necessary terms needs to be defined.

<i>Makam; usul;</i>	The structure of the music
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<sup>48</sup> Gill-Gürtan, "Performing Meşk, Narrating History", 620.

<sup>49</sup> Sozer, "Discovering One's Self", 151.

<sup>50</sup> Ibid., 25; Gill-Gürtan, "Performing Meşk, Narrating History", 620.

<sup>51</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 56.

<sup>52</sup> Altintas, "Turkish Art Music Examination of Voice Methods", thesis, Afyon Kocatepe University, 2010.

<sup>53</sup> Altintas, "Turkish Art Music Examination of Voice Methods", 620.

<sup>54</sup> Altintas, "Turkish Art Music Examination of Voice Methods", 620.

<sup>55</sup> Ibid, 620.

<i>taksim</i> and <i>beste/ eser</i>	which are well-known compositions by musicians
<i>aruz</i>	which was a poetic meter
<i>Dizi dövmek</i>	“Beating a line” is the method that a master would teach repertoire to a student.

Figure 4. <sup>56</sup>

Literature, specifically Turkish poetry, was an essential part of the curriculum as well as *taksim* and *beste/ eser*. Other topics of study included other languages, music theory, the history of music, including the history of *makam*, notable composers, significant repertoire, and *aruz*.<sup>57</sup> Meşk was concentrated on a poetic basis of Turkish music and organized the training process accordingly. *Dizi dövmek*, or “beating a line,” was the method through which a master would teach repertoire to a student. Specifically, the master would beat the *usul* in a variety of patterns with their hands on their knees and thighs, and the student would follow on their own body. Because the focus of Meşk was already concentrated on the poetic basis of Turkish music, this method of *dizi dövmek* was effective and ideally suited to the transmission of vocal repertoire. Musical notation and writing down traditional works did however, come into fashion in Türkiye after the transition from the Ottoman Empire into the Republic of Türkiye in 1922.<sup>58</sup> At that time, the use of Western music notation became more common due to the insistence of Atatürk in 1934.<sup>59</sup> Because of this, Western classical

<sup>56</sup> Ibid, 620.

<sup>57</sup> Ibid., 620.

<sup>58</sup> Ibid., 620.

<sup>59</sup> Price, *Chapter XI: Foundation of the Republic-Constitutional Changes and Dictatorships*, 128.



composers such as Paul Hindemith and Béla Bartók were invited to the Republic of Türkiye to advise the guidance for state music policies.<sup>60</sup> Due to these reforms, modern conservatories in Türkiye still utilize the Western education model with some adaptations to include ideals of historic Turkish music.<sup>61</sup>

### **3.2 Turkish Singer and Pedagogue: Saadet İkesus Altan**

Music education in Türkiye changed at the prompting of the political leadership of the Republic of Türkiye. Atatürk’s drive to bring the newly established republic into the twentieth century and integrate with the Western world encouraged young Turks to go and study in Europe. Mezzo-soprano Saadet İkesus Altan (1916 – 2007) was one of these pioneer Turkish students who traveled to Germany to study and perform.<sup>62</sup> Later known as the “teacher of teachers”, Altan began her formal training with Nurullah Sevkett Taskiran at the Musiki Muallim School of Music, which would later become the Ankara Conservatory. Altan would return and serve here as a voice teacher and lecturer in her later career.<sup>63</sup>

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<sup>60</sup> Gill-Gürtan, *Performing Meşk, Narrating History*, 620.

<sup>61</sup> Özcan Altıntaş, *Traditional Turkish Art Music Examination Of Voice Methods Applied*, 60., 50.

<sup>62</sup> Ömer Türkmenoğlu, and Hande Yılmaz. “Life of Saadet İkesus Altan and Review of ‘Vocal Education’ Book.” *Journal of World of Turks* 13, no. 1 (April 15, 2021): 273–92.

<sup>63</sup> Musiki Muallim Mektebi, “The sound of the republic”, <https://librarydigitalcollections.ku.edu.tr/en/digital-exhibitions/the-sound-of-the-republic-musiki-muallim-mektebi/>.



Figure 5: Mezzo-Soprano Saadet İkesus Altan<sup>64</sup>

After a 1938 successful performance in front of Atatürk, Altan and a few other young Turks began their studies at the Berlin Conservatory and eventually graduated in 1940.<sup>65</sup> Altan took steps to become part of the German Cultural Office so she could start a performing career, but a refusal due to her ethnic background led her to obtain a position at Duisburg Opera and Frankfurt Opera.<sup>66</sup> In 1940, Altan signed a three-year contract with Duisburg Opera in western Germany, and appeared in her first role there as Maddalena in the opera *Rigoletto*. Other roles she went on to perform at Duisburg Opera were Hänsel in Humperdinck's *Hänsel und Gretel* and the title character of *Carmen*.<sup>67</sup> In 1941, Altan was called back to Türkiye, and she made her debut February 13, 1942, in Beethoven's *Fidelio*.<sup>68</sup>

After her return to Türkiye, she began a multifaceted career as a singer, teacher, opera coach,

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<sup>64</sup> Ibid., 278.

<sup>65</sup> Ibid., 28.

<sup>66</sup> Ibid., 22; 36.

<sup>67</sup> Türkmenoğlu and Yılmaz, *Life of Saadet İkesus Altan and Review*, 278.

<sup>68</sup> Türkmenoğlu and Yılmaz, *Life of Saadet İkesus Altan and Review*, 278.

radio broadcaster, opera director, and libretto translator. In the course of her lifetime, Saadet İkesus Altan translated over fifty operas from their original language into Turkish.



Figure 6: Saadet İkesus Altan<sup>69</sup>

She later published a vocal pedagogy book designed specifically for Turks.<sup>70</sup> This text was widely used by the university systems to teach voice around Türkiye. She created an educational structure for the voice student, which, due to its strong influence, is still in place in many conservatories around Türkiye today.<sup>71</sup> Her pedagogical book has since been combined with her autobiography, *Kara Böcek*. The small book, while not inclusive of all of her pedagogical writings, remains part of some collections today and helps to promote the story and legacy of this famed Turkish pedagogue.

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<sup>69</sup> Saadet İkesus Altan, *Kara Böcek* (Sel Yayıncılık, 2018), 87.

<sup>70</sup> Türkmenoğlu and Yılmaz, *Life of Saadet İkesus Altan and Review*, 278.

<sup>71</sup> *Ibid.*, 278.



Figure 7: Saadet İkesus Altan's Pedagogy Book *Voice Education and Protection* <sup>72</sup>

### 3.3 Conservatory Models in Türkiye

The institutes providing professional music education function as conservatories which offer courses of study in music technology, musical sciences, and Turkish music. <sup>73</sup> The creation of these educational institutes began after the establishment of the Republic of Türkiye. Saadet İkesus Altan's profound contribution to this system remains important today. <sup>74</sup> The first school to train music educators was established in Ankara in 1924, and was called Musiki Muallim Mektebi or Music Teacher Training School. <sup>75</sup> However, in 1976, the first Turkish music conservatory opened,

<sup>72</sup> Altan, *Kara Böcek*, 90.

<sup>73</sup> Celenk, "Institutions Giving Professional Music Education in Turkey", 56.

<sup>74</sup> Altan, *Kara Böcek*, 73.

<sup>75</sup> Aysun Tonya, "In Departments Of Faculties Of Education An Investigation Of The Problems Encountered In Individual Voice Education Lessons According To Teacher And Student." Thesis, Dokuz Eylül Institute Fine Arts Education, 2008.

which provided music education for music performers.<sup>76</sup>

Subsequently, music education in Türkiye became defined into three parts. The first, general music education, was open to everyone at the primary, secondary, and high school levels. The second focused on amateur or volunteer music education in optional programs for students provided by public training centers or private music courses. Lastly, vocational or professional music education concentrated on students aspiring to pursue a musical career either in education or performance.<sup>77</sup>

The modern Turkish conservatory system mostly resembles the Western classical view of education which includes theory class, aural skills class, voice lessons, instrument lessons, and participation in group classes.<sup>78</sup> However, repertoire in the Türkiye conservatories differs from the standard Western classical model by emphasizing pieces that the ensemble or performer is ready to interpret, not necessarily having been already learned by the ensemble or performer.<sup>79</sup>

The modification of the Meşk system in Türkiye conservatories for repertoire classes places a strong desire on creating a working memory base for each student so they will be able to go without notation efforts.<sup>80</sup> The utilization and integration of *makam* into the higher education system has taken its form in classes such as Turkish Music Solej and Theory, Theory and *Makam* Knowledge, and Turkish Music *Makam* Knowledge. The modern system used to teach these classes integrates western-style study of musical sentence structure, known as the solfege system, with the Turkish *makam* music theory system.<sup>81</sup>

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<sup>76</sup> Aslı Yıldırım, “Profesyonel Müzik Eğitiminde Müzik Arşivciliğinin Yeri ve Önemi.” *Akademik Müzik Araştırmaları Dergisi* 3, no. 5 (January 5, 2017): 1–26.

<sup>77</sup> Celenk, “Institutions Giving Professional Music Education in Turkey”, 56; Tonya, *Problems Encountered In Individual Voice Education Lessons*, 34.

<sup>78</sup> Ibid., 9.

<sup>79</sup> Yıldırım, *Profesyonel Müzik Eğitiminde Müzik Arşivciliğinin Yeri ve Önemi*, 11.

<sup>80</sup> Ibid., 15.

<sup>81</sup> Ibid., 16.

Altan was influential in moving the Turkish voice teaching approach toward the Western classical tradition. Altan took her German-based training and created a pedagogical book to suit the Turkish voice. She outlined basic pedagogical knowledge of anatomy, a system for discerning and defining voice types, and procedures for initial voice training using vocalises.<sup>82</sup> Similarly, she utilized the Bel Canto method to train her students with vowels and breathing techniques.<sup>83</sup> Her work thus brought elements of the Western classical music education in the Turkish conservatories.

Meşk was also used to teach Turkish Traditional Folk Music. Since Meşk primarily utilizes face-to-face lesson sessions, certain conservatories began to specialize in this traditional style of music. No formal vocal training was given during these lessons; some scholars have conjectured that the integration of technical studies for voice training could improve the Traditional Folk Music style.<sup>84</sup>

All in all, the conservatory system of music education in Türkiye has developed from the time of Atatürk to the modern era. Progressing from Ottoman music, the teaching practices of Meşk, combined with the utilization of the *makam* system, have helped broaden the educational systems used in the modern conservatory. Stimulated by the integration of classical music into Türkiye conservatories, the new wider educational model melds elements of both the different genres of Turkish traditions and the classical music world.

#### **Section 4: United States Teaching Models**

The United States has a long and complex history of vocal music. In the modern academic settings in universities and conservatories, there has been a development of group teaching methods for teaching the individual voice in a group setting.<sup>85</sup> Originally, cathedral choir schools, elementary

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<sup>82</sup> Temiz And Yilmaz, *The Place and Importance of Digital Literacy in Music Education*, 1123–1135.

<sup>83</sup> Özcan Altıntaş, *Traditional Turkish Art Music Examination Of Voice Methods Applied*, 60, 1131; Altan, *Kara Böcek*. 61.

<sup>84</sup> Ibid., 62.

<sup>85</sup> DeRosia, “Singing and Learning Together”, 20.

education, religious organizations, and churches were the core foundations in which pedagogy was developed. However, in the early twentieth century, there was a development in the U.S. of early class voice books outside of these settings.<sup>86</sup>

This early class voice instruction highlights the importance of Bel Canto singing over other styles of singing, which were considered unrefined.<sup>87</sup> The goal of the ‘Voice Culture’ movement in the United States was to create a standard of elocution and singing that would present the cultural and socio-economic achievements of the country through a colonial lens. Due to this usage of Bel Canto technique as being the “right” form of singing, it perpetuated classism into vocal teaching. Multi-genre teaching in voice studios and voice class settings is counteracting that trend in the conservatory and university settings. As the twentieth century progressed, increasing implementation of the methods of Garcia II and Marchesi have been used in the progressive literature of voice group teaching books to promote health of the voice rather than to promote classical elitism.

One of the influential manuals used to teach class voice through the twentieth century included Richard Rosewall’s *Handbook of Singing: A Guide to Vocal Development for the Beginning Student and the Teacher in Training*. Published in 1961, Rosewall’s book outlines fundamental structure and physiology that is relevant to other genres.<sup>88</sup> Likewise, *Steps to Singing for Voice Classes* by Royal Stanton, published in 1971, outlines the advantage of class voice methods that allow beginning students to prosper in an encouraging and supportive classroom environment.<sup>89</sup> *The Basics of Singing* by Jan Schmidt published in 1984, *Adventures in Singing* by Clifton Ware published in 1995, *The Singing Book* by Merideth Bunch and Cynthia Vaughn

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<sup>86</sup> Ibid., 20; D. A. Clippinger, *The Clippinger Class-Method of Voice Culture*, (Lyon & Healy, Inc, 1933).

<sup>87</sup> DeRosia, “Singing and Learning Together”, 20.

<sup>88</sup> Richard B. Rosewall, *Handbook Of Singing A Guide To Vocal Development For The Beginning Student And The Teacher-In-Training By Richard B. Rosewall*, (Dickerson Press, 1984).

<sup>89</sup> Stanton, Royal. *Steps To Singing For Voice Classes* (Wadsworth Pub. Co, 1976).

published in 2000 and revised in 2024, and *Class Voice: Fundamental Skills for Lifelong Singing* by Brenda Smith and Ronald Burrichter published in 2023 are all examples of books that employ the fundamentals of the Bel Canto singing practice but place it in a pedagogical light that services the individual voice without “othering” and alienating students who are interested in repertoire outside of Western Classical music.<sup>90</sup>

One of these previously mentioned titles is that of Clifton Ware’s *Adventures in Singing*, published in 1995 and revised in 2008. It is an expansive and semi-comprehensive book aimed at the singing teacher. In his preface, Ware states,

“*Adventures in Singing*... although intended primarily for beginning voice students, these materials will be useful to anyone interested in learning about the singing process... [and] the major features and advantages of the text are (1) methodological voice building techniques... (2) foundational preparations...(3) self-assessment questions... The subject matter is systematically presented, beginning with the preparation of the mind and body... and continuing with the discussion of vocal skills, such as breath management, vocal fold vibrations, resonance, diction, coordination, and performance.”<sup>91</sup>

Ware’s comprehensive view of teaching the singing voice promotes a stronger guide for the teacher. Ware’s crafting of his text emphasizes the building of a student’s mindset as the foundation of the vocal journey. This is designed to set the student up for better results, not just vocally, but physically and mentally. This specificity in his methodology allowed for the development of the individual voice in the group setting with informed principles of voice teaching and voice science.

#### **4.1 Conservatory Teaching Models**

While group voice teaching has been integrated into some conservatory and smaller university models, the prevailing model across large music programs in the United States is the

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<sup>90</sup> DeRosia, “Singing and Learning Together”, 20; Jan Schmidt and Heidi Counsell Schmidt, *Basics Of Singing*, (Schirmer Books, 2008); Clifton Ware, *Adventures In Singing: A Process For Exploring, Discovering, And Developing Vocal Potential*, (McGraw-Hill, 2008); Cynthia Vaughn, Meribeth Dayme, and Matthew Hoch, *The Singing Book* (Rowman & Littlefield, 2024).

<sup>91</sup> Ware, *Adventures In Singing*, vi.



teacher-student model of one-on-one teaching.<sup>92</sup> This framework still present in the modern U.S. conservatory was inherited from a European pedagogical philosophy.<sup>93</sup> Teacher-student relationships are moving away from the teacher-centric model and toward the student-centric model. There is some resistance to change from larger conservatories, but also in response, there are more scholars, like Ware, who work on a smaller scale that are cultivating student-centric models that aid in changing this standard.

#### **4.2 The Use of Group Voice Teaching Models Today in the U.S.**

Today, group teaching models have been promoted by associations like the National Association of Teachers of Singing (NATS). This group recognizes Clifton Ware as a standout contributor and pioneer in the group teaching world.<sup>94</sup> Ware's contribution to group teaching has inspired other teachers, and in collaboration with Ware, there has been a development through NATS to have a Group-Voice Pedagogy Affinity Group.<sup>95</sup>

As described on the NATS website, "An affinity group is a voluntary member resource group within NATS that enables members to meet together and build connections based on shared characteristics or interests."<sup>96</sup> These groups enable and foster collaboration through a variety of subjects and group types. Currently, the Group-Voice Pedagogy Affinity Group is led by Clifton Ware and Amelia Rollings-Bigler. Dr. Rollings-Bigler is an associate professor of voice and pedagogy at Coastal Carolina University. Rollings-Bigler has also contributed to conversations

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<sup>92</sup> Travis Sherwood, "Evolving the Master-Apprentice Tradition: A Pathway Back to a Student-Centered Pedagogy", *Journal of Singing* 80, no. 1 (August 15, 2023): 13–22; Katharine DeBoer, "Smart Strategies for Small Departments: Class Voice for Freshman Voice Majors." *Journal of Singing* 68, no. 3 (January 2012).

<sup>93</sup> Christopher J. Smith, "The Anti-Colonial Conservatory." *Navigating Stylistic Boundaries in the Music History Classroom*, March 18, 2024, 197–220.

<sup>94</sup> National Association of Teachers of Singing. Accessed May 8, 2025. <https://www.nats.org/affinitygroups.html>.

<sup>95</sup> Ibid.

<sup>96</sup> Ibid.

about the future for comprehensive group voice pedagogy.<sup>97</sup> For many voice teachers and pedagogues, this prioritizes inclusivity in voice teaching which is increasingly important now and for the future. Without the innovation of pedagogues like Marchesi, models of singing education may have still emulated the restrictive master-apprentice relationship.<sup>98</sup> Progress toward more inclusive practices of voice teaching also enables group pedagogical methods to integrate other genres like Classic Rock, Pop, Jazz and many others.<sup>99</sup>

## Section 5: Comparison of Models Presented in this Paper

The comparison of models will revolve around the following schools of thought: Garcia II & Marchesi, Meşk, and U.S.

	Garcia II & Marchesi	Meşk & Other Cultures	U.S. Methods
Group Teaching Model	Garcia's voice science was the foundational model for Marchesi's teaching and her eventual group teaching methods.	Group teaching in Meşk and other non-Western Classical music traditions is usually reserved for beginners or for training teachers to teach beginning students under the supervision of their teacher.	Group teaching methods developed heavily in the U.S. under the guidance of key pedagogues such as Dr. Clifton Ware, and are now being carried forward by Dr. Amelia Rollings-Bigler.

<sup>97</sup> Bigler Rollings, Katherine Osborne, Chadley Ballantyne, Brian Horne, Kimberly James, Brian Manternach, Yvonne Redman, and Melissa Treinkman, "Voice Pedagogy for the 21st Century: The Summation of Two Summits." *Journal of Singing* 78, no. 1 (August 24, 2021): 11–28.

<sup>98</sup> Sherwood, "Evolving the Master-Apprentice Tradition", 20.

<sup>99</sup> DeRosia, "Singing and Learning Together", 20; Solomon Adeboye Babalola, *The Content And Form Of Yoruba Ijala* (University of London, School of Oriental and African Studies, 1963).

Master-Apprentice Model	Garcia heavily promoted this teaching style due to the Italian tradition he trained in. Marchesi, while starting as a one-on-one teacher did integrate her ideas to encompass both group teaching and one-on-one instruction.	The most common model seen even today in the Meşk tradition. The Master-Apprentice model was a way of transmitting music that was not written down and intentionally transmitted through oral tradition.	Still widely used through private instruction across the U.S. as well as through formal institutions like universities, conservatories, and private teaching facilities for communities. This model is moving away from teacher-centric and toward student-centric models of teaching.
Lifestyle of Students	Marchesi had a strong regimen for her	Historically, for Meşk, the lifestyle of the student was integrated into the	General recommendations are made by voice teachers to students,

	students to follow. This included meal plans, exercise regimen, in addition to the standard vocal warm-ups and practice sessions.	home of the master. The master became the most important person in the student's life, above family. Because of this, the stewardship that the master had to the student was to be not only the physical provider for them but the spiritual one as well, as it is considered that the transmission of meşk is not just that of music, but it is spiritual.	but usually they are not less strict than the other two models. This could be in part due to the U.S. attitude of independence of oneself and the student-centric model that the U.S. is shifting towards.
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Conservatory	Marchesi taught at several conservatories and developed teaching systems there to benefit her students. While it is not clear the exact systems she put into place, it was focused on the students' education and development through classroom instruction and private teaching.	The university and conservatory system set up in Türkiye has integrated Western Classical teaching models due to the expansion of Western ideas by Atatürk. However, Meşk is still taught in Traditional Turkish Music in the university setting with an emphasis on oral tradition, however, there has also been notation developed to aid in this education.	Teacher-student model of private lessons is still widely used, especially among some of the top programs in the country. However, at some smaller programs or lesser-known ones, group voice teaching is being utilized and developed to help the individual singer in a group setting.
Genre	Both Garcia and Marchesi only taught the Bel Canto tradition of singing.	Meşk is usually utilized to teach Traditional Turkish Music or Folk Music. In the conservatories in Türkiye, there is also Western Classical voice that is taught through methods adjacent to Bel Canto.	All genres of music are studied in this system. Usually, at some of the more well-known institutions across the U.S., it is only classical degrees with some musical theater training, but not all. There has been a surge in the last decade to integrate not just musical theater into curricula but also contemporary music, commercial music, jazz, and other genres that have not been previously taught at institutions.

Figure 8. Table of Comparison of Models

The Garcia and Marchesi method was the foundation of voice science that we have today.<sup>100</sup> Marchesi took Garcia's methods of teaching and crafted her model for teaching treble voices.<sup>101</sup> Through this new model, Marchesi was able to create a vocal educational environment that was well-rounded for the individual pursuits of the singer. The work of Garcia and Marchesi took the progression of the singing teacher and the relationship and education of the student to a new level.

The Meşk system of music and the development of conservatories in Türkiye presented a clear integration of Western classical music into the culture, but also included the cultural practices of the master-apprentice relationship that had flourished for centuries under the Ottoman Empire. These methods include group teaching methods as well as similarities to one-on-one methods of oral transmission of teaching.

The U.S. methods for group voice teaching have been crafted and developed extensively in the U.S. for decades. From the 1970s to the present day, there has been extensive development on group teaching methods in universities, independent voice teachers, and official organizations.

As developmental scientists have considered the development of educational systems in the modern era, the modern voice pedagogue has also considered different learning styles of students.<sup>102</sup> Moving toward this student-centric model allows for further development of group teaching research and application in addition to aiding the private one-on-one lesson method.

Even though the vast geography of teaching models present can seem daunting, threads of similarity among the groups appear. The groups examined in this paper represent only a small sample of the vast global vocal teaching methodologies.

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<sup>100</sup> Stark, *A History of Vocal Pedagogy*, 4.

<sup>101</sup> Neill, *Divas*, 314.

<sup>102</sup> Lynn Holding, *The Musician's Mind: Teaching, Learning, And Performance In The Age Of Brain Science*, (Findaway World, 2022).

## **Conclusion**

This paper represents a non-comprehensive look at voice teaching models across different continents by comparing master-apprentice models to the present-day models ranging from teacher-student to group voice.

Comparing the models including the Bel Canto tradition, Türkiye's Meşk, and the U.S. group teaching literature shows how trends in musical education and methodology have transmitted across cultures and developed. These transitions are highlighted in the important historical record of pedagogical literature provided by the writings of influential pedagogues like Mathilde Marchesi and Saadet Ikesus Altan.

Marchesi and Altan are two historical pedagogical figures that shaped the methodological and educational models of their countries. Their contribution to voice teaching methods have influenced modern teaching practices across the globe. Finally, the United States' contribution to the voice teaching field has accelerated from the mid twentieth century to the modern day. Through the efforts of modern pedagogues like Clifton Ware and Amelia Rollings-Bigler, group teaching methods have continually developed to aid the student in their vocal journey. This shift from one-on-one teaching models to group teaching and student centric ideas has the potential to create more independent and creative artists.

# Hidden in Plain Sight: Mapping LGBT+ History in the Alamo City

By: Kristen Clay

Department of History

## Abstract & Introduction

*Today, there are numerous websites and publications dedicated to finding LGBT+ spaces in every major city in the world, but it wasn't always so easy. Word of mouth and secret codes were often the only way of accessing these safe havens. In San Antonio despite, or perhaps because of, the proximity of military bases, LGBT+ nightlife flourished even hidden as they had to be. Like other marginalized groups, the LGBT+ community of the 21st century often finds itself struggling to find concrete evidence of the community's historical existence. As businesses came and went, and as the community fought for survival during the AIDS crisis, documenting lives became more important than documenting spaces. Without community archivists and business owners, these spaces can disappear with no real record of them ever having existed. Now, as the community faces historical denials from inside the federal government, it is more important than ever that these spaces are not only acknowledged, but celebrated. Drawing on research from scholars like Melissa Gohlke, Amanda Mixon and the lived experiences of San Antonians like Carolyn Weathers, Jimmy James, Lollie Johnson, and John McBurney this project brings together oral histories, urban geography, and LGBTQ+ studies. By documenting this history, we honor those who lived it and remind ourselves that visibility has always been a battleground.*

**Editor's Note:** This is a digital story map as an interactive webpage. Thus, it cannot be effectively included in the pdf version of this journal. For the full ArcGIS Project experience, please visit: <https://storymaps.arcgis.com/stories/cddecaf739e74fdbbf07c514dacd32d0>.

# **Unprepared and Ultimately Unpopular: Struggles of the British Army Early in The Northern Irish Troubles**

By: Julian Hernandez  
Department of History

## **Abstract**

*This paper examines the British Army's early involvement in Northern Ireland during the onset of the Troubles (1969–1972), arguing that the force was fundamentally unprepared and institutionally misaligned for the counterinsurgency mission it was tasked with. Drawing upon primary sources such as the British Ministry of Defence's 2006 Operation Banner report and secondary scholarship, including Paul Dixon and Rod Thornton, the study contends that the Army's posture, shaped by Cold War imperatives and recent imperial withdrawals, left it ill-equipped for operations within the United Kingdom itself. The British Army lacked the training, doctrine, and strategic guidance necessary for effective internal security operations against British citizens. Early operational failures, including the Ballymurphy confrontation, the "Rape of the Falls," the reintroduction of internment, and the Bloody Sunday massacre, critically undermined public perception and fueled insurgency, particularly among the Catholic nationalist population. The paper situates these failures within the broader context of British counterinsurgency theory, specifically the neglected principles of the "Hearts and Minds" approach, and demonstrates how military missteps between 1969 and 1972 contributed to the protracted nature of the conflict. Ultimately, this study offers a cautionary narrative about the strategic risks of deploying conventional military forces to address complex domestic unrest without adequate preparation, political clarity, or civil-military coordination.*



In times of civil unrest, disturbance, and violence, governments have often resorted to employing the armed forces as a way of restoring order and control. The British Government was no exception when the Troubles in Northern Ireland (1968-1998) spiraled into widespread violence. The decision to deploy the British Army in significant numbers to the streets of Northern Ireland in 1969 would ultimately redefine the Troubles. What in 1968 began as an organized push for civil rights by large segments of the province's Catholic population, who had long perceived widespread discrimination at the hands of the Protestant ruling majority, transformed into an armed conflict largely characterized by paramilitary violence on both sides and the government's military response to quell the violence.<sup>1</sup> However, the purpose of this paper is neither to vilify nor vindicate the actions of any party involved in the Troubles. Rather, it is to show that the British Army of 1969 was neither prepared nor postured to take on the mission assigned to it starting in August of that year. Ultimately, that lack of preparation would lead to missteps early in the campaign (1969-1972), tarnishing public perception of it for the remainder of its duration.

## **State of the British Army in 1969**

An often-undermentioned aspect of the military considerations during the Troubles is that most of the conflict occurred during the context of the Cold War. The British Army of 1969 was primarily postured to respond in case of a land war between the North Atlantic Treaty Organization (NATO) and the Warsaw Pact on the European continent. According to information released by the Ministry of Defence (MOD), the British Army consisted of 179,000

<sup>1</sup> Wallenfeldt, Jeff. "The Troubles." In *Encyclopedia Britannica*, last updated August 23, 2025.  
<https://www.britannica.com/event/The-Troubles-Northern-Ireland-history>.

troops in 1969.<sup>2</sup> As of 1967, at least 53,000 soldiers (almost a third of the Army's total strength) were stationed on the European continent as part of the British Army of the Rhine.<sup>3</sup> The British military presence in West Germany and a possible confrontation with the Soviet Union continued to be the primary focus of the United Kingdom's defense strategic thinking into the 1980s.<sup>4</sup> British forces had engaged in multiple counter-insurgency campaigns since the end of the Second World War, but this would actually lead to a false sense of confidence when the time came for British leaders to evaluate the readiness of the Army to respond in Northern Ireland.<sup>5</sup>

An MOD report filed in 2006 summarized the state of the British Army in 1969 as part of its analysis of Operation Banner, the official Army name for the campaign in Northern Ireland lasting from 1969 to 2007, and the longest deployment in the history of the British Army.<sup>6</sup>

In 1969 the Regular Army was a highly experienced force. It had fought a number of campaigns in the long withdrawal from Empire after 1945, mostly against insurgent forces in former colonies. Campaigns had been waged in Malaya, Kenya, Aden and Cyprus. These had rarely involved over a Division, a relatively small proportion of the Army of the time. Many soldiers who had served in the Second World War were still in the Army until the mid-1960s. In addition, standards of individual training were somewhat lower; for example, attendance by NCOs at tactics courses at the School of Infantry only became mandatory in the 1980s.<sup>7</sup>

<sup>2</sup> United Kingdom Ministry of Defence. "An Annual Time Series for the Size of the Armed Forces (Army, Navy, and RAF) since 1700." Defence Statistics, April 28, 2017. <https://assets.publishing.service.gov.uk/media/5a81d66740f0b623026996e1/2017-04440.pdf>. Response to a Freedom of Information Act request on the size of the armed forces broken down by service and year.

<sup>3</sup> Parliamentary Debates, "Defence (Army) Estimates, 1967–68, Vote A," col. 1214. [https://api.parliament.uk/historic-hansard/commons/1967/mar/06/defence-army-estimates-1967-68-vote-a#S5CV0742P0\\_19670306\\_HOC\\_566](https://api.parliament.uk/historic-hansard/commons/1967/mar/06/defence-army-estimates-1967-68-vote-a#S5CV0742P0_19670306_HOC_566).

<sup>4</sup> National Army Museum. "The British Army and the Falklands War." Accessed April 27, 2024. <https://www.nam.ac.uk/explore/british-army-and-falklands-war#:~:text=Of%20the%20160%2C000%20soldiers%20in,of%20supply%20and%20re%2Denforcement>

<sup>5</sup> Thornton, Rod. "Getting It Wrong: The Crucial Mistakes Made in the Early Stages of the British Army's Deployment to Northern Ireland (August 1969 to March 1972)." *Journal of Strategic Studies* 30, no. 1 (March 22, 2007): 73–107, 77.

<sup>6</sup> United Kingdom Ministry of Defence. "Operation Banner: An Analysis of Military Operations in Northern Ireland." AC 71842. London, 2006. [https://www.vilaweb.cat/media/attach/vwedts/docs/op\\_banner\\_analysis\\_released.pdf](https://www.vilaweb.cat/media/attach/vwedts/docs/op_banner_analysis_released.pdf), 1-1.

<sup>7</sup> UK Ministry of Defence, 2-17.

From this representation, it can be easy to come away with a sense the Army was prepared for the deployment to Northern Ireland, however, even a cursory examination of the campaigns mentioned shows those operations did not offer the direct parallels which might have helped Army leaders and soldiers succeed in Northern Ireland. The most glaring difference is that all four campaigns (Malaya, Kenya, Aden, and Cyprus) involved operations targeting British colonial subjects or foreigners, in territories far from the British homeland. The mission in Northern Ireland would pit the Army against British citizens, which significantly deepened the complexity of the situation. Another important distinction is that all four campaigns ultimately ended with British withdrawal from the territories involved, supporting the idea that military solutions to political problems rarely bare fruit. It is beyond the scope of this paper to delve into the deeper tactical and strategic nuances that differentiate the campaigns of withdrawal from empire to Northern Ireland. However, it is a fallacy to believe experiences from those campaigns meant the Regular Army was particularly prepared to succeed during the opening stages of Operation Banner in 1969.<sup>8</sup>

Indeed, it can be argued the failure to implement key lessons from the campaigns of withdrawal from empire, often referred to as “Hearts and Minds” theory, is a significant component of what hampered the effectiveness of British troops in Northern Ireland from 1969 through 1972. In an article published in the *Journal of Strategic Studies*, professor Paul Dixon identifies four key elements as the essence of the “Hearts and Minds” theory:<sup>9</sup>

- demonstrating ‘political will’ to defeat the insurgents as the key to victory
- the importance of ‘the battle for hearts and minds’ of the affected population
- ‘police primacy’ over the army in defeating insurgents

<sup>8</sup> Rigden, I.A. “British Approach to Counter-Insurgency: Myths, Realities and Strategic Challenges”. Master’s thesis, United States Army War College, 2008. <https://apps.dtic.mil/sti/pdfs/ADA479660.pdf>, 9–11.

<sup>9</sup> Dixon, Paul. ““Hearts and Minds”? British Counter-Insurgency Strategy in Northern Ireland.” *Journal of Strategic Studies* 32, no. 3 (2009): 445–74. doi:10.1080/01402390902928271, 446.

- the importance of civil-military coordination to bring together all

Dixon points out “Hearts and Minds” theory as the “classical British counter-insurgency theory of the sixties”, and outlines “good government”, “psychological operations”, and “minimum force” as three ways to “win” the battle for “Hearts and Minds.”<sup>10</sup> As will become evident through examination of events later in this paper, the British government and the Army failed to fully embrace these principles of counter-insurgency in the early years of the Northern Ireland campaign (1969-1972) which ultimately led to a prolonging of Operation Banner and exacerbated the violence.

It is critical to avoid assuming that, simply because “Hearts and Minds” theory served as the prevailing British view on counter-insurgency in 1969, its core tenets and operating principles were widely known and understood at all levels of the British military and governing structures. In fact, the Ministry of Defence report on Operation Banner openly acknowledges the lack of specialized training for the troops deploying to Northern Ireland stating, “neither the resident nor the first reinforcement battalions [deployed to Northern Ireland] had received any internal security training.”<sup>11</sup> The report added, “The first units arrived in Northern Ireland with no special-to-theatre training.”<sup>12</sup> In any military operation, proper preparation is vital to prevent poor performance. For troops deploying to “defense support of civil authorities” or counter-insurgency operations, this preparation is even more important as a deep understanding of the volatile situation they are stepping into is vital to avoid misunderstandings and misconceptions which can doom operations of this delicate nature from the outset.

## **The Decision to Deploy**

<sup>10</sup> Dixon, 445–448.

<sup>11</sup> UK Ministry of Defence, “Operation Banner,” 7-1.

<sup>12</sup> UK Ministry of Defence, 7-8.

As political and social strife in Northern Ireland increased leading up to the August 1969 events that would serve as the catalyst for military intervention, British leaders in Westminster and Whitehall displayed a reluctance to become directly involved. J. Brian Garrett was a solicitor of the Northern Ireland Supreme Court, and former chairman of the Northern Ireland Labour Party. In an article titled “Ten Years of British Troops in Northern Ireland”, published in the winter 1979/1980 edition of *International Security*, Garrett noted, “prior to 1969, British Governments had been fastidious in their ‘let sleeping dogs lie’ stance.”<sup>13</sup> He added, “In August 1969, however, the sustained and vicious rioting which had occurred in Londonderry and Belfast left an exhausted Northern Ireland police force and destroyed Westminster’s convention of non-interference in Northern Ireland affairs. The Northern Ireland dog had shown it was most certainly not asleep.”<sup>14</sup>

The decision to call out Regular Army troops in August 1969 came in response to a request for help from the Northern Ireland Government, commonly referred to as Stormont. As noted in the Ministry of Defense report on Operation Banner, Stormont had approved a march for August 12 without fully considering the consequences.<sup>15</sup> Some 15,000 loyalist marchers ended up clashing with thousands of nationalist protesters, leaving the Royal Ulster Constabulary, the Protestant-dominated police force for Northern Ireland, “completely overwhelmed”.<sup>16</sup> In the 48 hours following the initial clashes, violence quickly spread from Londonderry to other areas of Northern Ireland. On August 14, Stormont officially requested the Army’s intervention, prompting the following response from Whitehall: “The United Kingdom Government has received assessments of the situation from the Northern Ireland

<sup>13</sup> Garrett, J Brian. “Ten Years of British Troops in Northern Ireland.” *International Security* 4 (1980): 80–104. <https://muse-jhu-edu.libweb.lib.utsa.edu/article/446464/pdf>, 85.

<sup>14</sup> Garrett, “Ten Years of British Troops,” 85.

<sup>15</sup> UK Ministry of Defence, “Operation Banner,” 2-3.

<sup>16</sup> UK Ministry of Defence, 2-3.

Government and G.O.C. [General Officer Commanding] Northern Ireland and has agreed to this request in order to restore order in Londonderry with the greatest possible speed. Troops will be withdrawn as soon as this is . . . accomplished. This is a limited operation.”<sup>17</sup> The perception by British leaders of a short-term commitment (as well as the emergency response nature of the situation) contributed to the lack of preparation for the Army forces ordered to respond. One government spokesman was quoted saying, “[the troops] would be back in barracks by the weekend.”<sup>18</sup> It does not require military expertise or genius to see the short-sightedness of this stance. The employment of armed soldiers in almost any context is an inherently escalatory act. British political leaders’ inability to foresee the consequences of resorting to a military solution would ultimately result in a lack of strategic vision and clarity for the crucial opening stages of Operation Banner.

### **The Army Attempts to “Sort This Bloody Mess Out”**

The political and strategic ambiguity in the opening moments of the Northern Ireland campaign was clear in the vague instructions British political leaders gave the military. Rod Thornton, associate professor of defense studies at King’s College in London, pointed out in a 2007 article in the *Journal of Strategic Studies*, “The Army was being told by politicians to ‘sort this bloody mess out’. It was not, however, despite the number of available political ‘overseers’, given any guidance as to how this should be done.”<sup>19</sup> It is here political leaders’ overconfidence in the Army’s capabilities, based on the perceived experience from prior campaigns during the withdrawal from empire, becomes clear. Thornton notes the leadership in London adopted a

<sup>17</sup> Garrett, “Ten Years of British Troops,” 85.

<sup>18</sup> Thornton, “Getting It Wrong,” 74.

<sup>19</sup> Thornton, “Getting It Wrong,” 77.

mindset of “just leaving it to the Army.”<sup>20</sup> He adds, “Much of this mentality, of course, was born of the fact that, since the Army was so used to dealing with trouble spots from previous colonial commitments, they should ‘know best’. But the Army was not used to operating in the UK without police support and without a ‘goal’ or ‘carrot’ or even a ‘plan’ established by the civil authorities.”<sup>21</sup>

With minimal guidance from the civilian leadership and no clear or realistic political objective, it should not come as a surprise that military leaders were unable to generate a sound strategic plan for Operation Banner. The 2006 Ministry of Defence report notes, “At no stage in the campaign was there an explicit operational level plan as would be recognised today.”<sup>22</sup> Out on the streets of Northern Ireland, this meant junior leaders and soldiers were left to “figure it out” as situations and problems inevitably arose. The MOD report states, “Much depended on individuals, their personalities, and how they got on together. Overall, the picture is of generally able and well-intentioned men doing what they believed best with a generally similar common purpose. In practice, too many things that were everybody’s job were nobody’s job. It could have been better.”<sup>23</sup> Given the lack of specialized internal security and counter-insurgency training for the troops deployed in 1969, the assertion of “generally able” is questionable. General soldiering ability and grasp of military fundamentals do not inherently translate to effective defense support of civil authorities or counter-insurgency operations. They are decidedly separate skill sets. What would emerge from this in the early years of the campaign was a theme of pursuing “tactical results”, when in fact a “more measured approach” was needed

<sup>20</sup> Thornton, 77.

<sup>21</sup> Thornton, 77.

<sup>22</sup> UK Ministry of Defence, “Operation Banner,” 4-4.

<sup>23</sup> UK Ministry of Defence, 4-4.

for operational/strategic success.<sup>24</sup>

## **Tactical Decisions, Tragic Consequences**

Before analyzing the missteps which would tarnish public opinion of the military presence in Northern Ireland, it is important to note there was a small window of opportunity where the arrival of British troops was viewed positively. Thornton wrote, “Despite the history between the Catholic population of Ireland and British forces, local Catholic communities actually greeted the Army effusively [in 1969]; ‘much like the troops who arrived to liberate Paris in 1944’. They were seen as neutral and divorced from the Stormont government and its perceived lackey, the Protestant-dominated [RUC] police force.”<sup>25</sup> While taking a considerably more moderate tone, the 2006 MOD report concurs, “Catholics viewed its [the Regular Army] arrival with a mixture of suspicion and relief. Most of them felt that it was there to protect them, but the republican perception was that the British Army was an army of occupation, which reflected myths and legends about the [1916] Easter Rising.”<sup>26</sup> To the credit of tactical-level leaders and soldiers, attempts were made in this initial period to build upon this early goodwill with some community relations efforts, featuring “Army-run community centres, taking children on trips to the countryside, running discotheques, delivering ‘meals-on-wheels’ to pensioners, etc.”<sup>27</sup> However, the lack of an overarching civil-military plan to address underlying social and political problems in Northern Ireland ultimately rendered those Army community relations efforts moot.

<sup>24</sup> UK Ministry of Defence, 4-4.

<sup>25</sup> Thornton, “Getting It Wrong,” 77.

<sup>26</sup> UK Ministry of Defence, “Operation Banner,” 2-4.

<sup>27</sup> Thornton, “Getting It Wrong,” 78.



While many military decisions taken between 1969 and 1972 could be critically analyzed for their effect on public opinion, this paper will consider four situations in particular for the scale of their effect, the enduring memory of their significance to the campaign, and the clarity with which they portray a force ill-suited for the task at hand. The Army's response to the March 1970 events in Belfast's Ballymurphy Catholic neighborhood, the July 1970 Balkan Street search (which came to be known in Catholic communities as the "Rape of the Falls"), the reintroduction of internment in August 1971, and the infamous "Bloody Sunday" massacre in January 1972 would all ultimately undermine the Army's credibility and irreparably harm public opinion of Operation Banner.<sup>28</sup>

Serving as one of the earliest examples of Army missteps in Northern Ireland based on lack of preparation and understanding, the March 1970 employment of soldiers in an attempt to prevent violence as a Protestant march passed through the predominantly Catholic Ballymurphy neighborhood in Belfast backfired. When the soldiers (mainly Protestant service members from the Scots Guards) lined the march route facing Catholic protesters, it gave the impression the troops were there to protect the Protestant marchers, not the Catholics.<sup>29</sup> When violence broke out, the outnumbered soldiers employed CS gas (a powerful type of tear gas employed by police and military forces) to break up the crowd, ultimately gassing the whole neighborhood and alienating the Catholic community.<sup>30</sup> Forces with proper internal security training would have been more likely to navigate this situation with the finesse required.

A more substantial miscalculation came only months later in July 1970. Based on a tip, a company-sized element of soldiers (roughly 100 to 150 troops) carried out a house-to-house

<sup>28</sup> UK Ministry of Defence, "Operation Banner," 2-5.

<sup>29</sup> Thornton, "Getting It Wrong," 82-84.

<sup>30</sup> Thornton, 83.

search for weapons and ammunition on Balkan Street in the predominantly Catholic Lower Falls area of West Belfast.<sup>31</sup> The operation angered the local Catholic community as the perception the Army did not protect Catholics was now compounded by efforts to seize the only weapons Catholics thought they had to aid in their defense.<sup>32</sup> Protesters quickly flooded the area, prompting a hasty retreat of the company-sized element and triggering three battalions (up to 3000 soldiers) to respond. The reinforcements imposed a 35-hour curfew, made widespread use of CS gas, and conducted a cordon-and-search operation of all houses in the Lower Falls area.<sup>33</sup> The debacle would be named the “Rape of the Falls” by nationalist elements, and marked the first time gunmen from multiple factions of the Irish Republican Army (IRA) were known to have fired on British troops since their arrival in August 1969.<sup>34</sup> The MOD report on Operation Banner concedes that “tactically the Balkan Street Search was a limited success. However, it was a significant reverse at the operational level. The search also convinced most moderate Catholics that the Army was pro-loyalist. The majority of the Catholic population became effectively nationalist if they were not already. The IRA gained significant support.”<sup>35</sup>

Whatever Catholic goodwill remained for the British Army presence would wither away in August 1971 with the reintroduction of “Internment (the incarceration without trial of suspected terrorists for long periods).”<sup>36</sup> It must be noted Internment was introduced against the advice of the Army,<sup>37</sup> but political leaders cited historical precedent to justify the move.<sup>38</sup> While

<sup>31</sup> Thornton, 86.

<sup>32</sup> Thornton, 86.

<sup>33</sup> Thornton, 86–87.

<sup>34</sup> Thornton, 86–87.

<sup>35</sup> UK Ministry of Defence, “Operation Banner,” 2-5.

<sup>36</sup> Thornton, “Getting It Wrong,” 91.

<sup>37</sup> UK Ministry of Defence, “Operation Banner,” 2-7.

<sup>38</sup> Thornton, “Getting It Wrong,” 91. Internment had been used to suppress a 1950s IRA campaign.

the Army did not support the decision, implementing it did fall to them. Here the Army failed in two critical aspects: first, they lacked updated intelligence to generate arrest lists which resulted in many arrests of suspected IRA members who were not involved or no longer active, and second, the Army made their preparations for the mass arrests in the open (building internment camps and rehearsing arrests) which meant many targets were gone when the raids came.<sup>39</sup> The MOD report made the consequences clear, “Both the reintroduction of internment and the use of deep interrogation techniques had a major impact on popular opinion across Ireland, in Europe, and the US. Put simply, on balance and with the benefit of hindsight, it was a major mistake.”<sup>40</sup>

Labeled by Thornton as “the worst mistake of the Army’s entire campaign in Northern Ireland”<sup>41</sup>, the events of January 13, 1972, infamously known as “Bloody Sunday”, would prove to be the proverbial “final nail in the coffin” for public perception of Operation Banner. Some 7000 Catholic civil rights demonstrators held an “illegal march”<sup>42</sup> in Londonderry, prompting a forceful response from troops of the 1<sup>st</sup> Battalion, Parachute Regiment, recently redeployed from Belfast to Londonderry and known for their aggressive tactics.<sup>43</sup> The vigorous Paratrooper pursuit of the marchers after some threw stones at the troops led the soldiers into no-go areas. In the ensuing chaos, soldiers shot and killed 14 demonstrators, none of whom were verifiably armed.<sup>44</sup> As the MOD Operation Banner report outlined, “The consequences ran around the world and could still be felt more than 30 years after the event. It is probably the only event in

<sup>39</sup> Thornton, “Getting It Wrong,” 92–93.

<sup>40</sup> UK Ministry of Defence, “Operation Banner,” 2-7.

<sup>41</sup> Thornton, “Getting It Wrong,” 99.

<sup>42</sup> Thornton, “Getting It Wrong,” 100. The march was considered “illegal” as Stormont imposed a six-month ban on marching in August 1971.

<sup>43</sup> Thornton, “Getting It Wrong,” 98–99.

<sup>44</sup> Thornton, 99–100.

the Troubles to be the subject of two Judicial Enquiries.”<sup>45</sup> Thornton was more forceful in his analysis, “The fallout from this incident was immense. Further world-wide opprobrium was heaped on Britain and its army. The stock of PIRA rose considerably in a city where it had not previously been prominent. Many young men, this time in Londonderry, flocked to join its ranks. The city was now, despite all the previous precautions, lost to the Army.”<sup>46</sup> While impossible to definitively say whether proper internal security and counter-insurgency training could have prevented the incidents examined in this section, these events demonstrate how troops postured for traditional tactical battlefield operations are often ill-suited for the nuanced, measured, and strategic work required in counter-insurgency scenarios.

### **“Hearts and Minds” Lost**

It is clear that by 1972, the British Army, and perhaps more importantly the British Government controlling the Army’s operations, had failed to meet any of the requirements set out by Dixon as necessary for success in a “Hearts and Minds” style counterinsurgency campaign. By not providing a clear way forward with a concrete civil and military plan, Whitehall and Westminster had not demonstrated the political will to win. The compounding mistakes by British Army forces between 1969 and 1972 caused irreparable harm to Operation Banner’s legitimacy in the eyes of significant portions of the population, primarily Catholic nationalists whose disaffection fueled the growing insurgency.<sup>47</sup> The RUC was far from having “police primacy” over the situation between 1969 and 1972, leaving the Army to take the lead on many operational aspects the troops were not properly prepared for.<sup>48</sup> Most critically, as has been

<sup>45</sup> UK Ministry of Defence, “Operation Banner,” 2-8.

<sup>46</sup> Thornton, “Getting It Wrong,” 100.

<sup>47</sup> Thornton, “Getting It Wrong,” 104–105; UK Ministry of Defence, “Operation Banner,” 8-3.

<sup>48</sup> Thornton, “Getting It Wrong,” 90; UK Ministry of Defence, “Operation Banner,” 4-3.

established throughout this paper, civil-military coordination was ineffective in the early campaign.

Dissatisfaction with Operation Banner extended beyond the Northern Irish population experiencing it firsthand. Dixon notes that in 1971 “a majority, 59 percent, of British public opinion supported withdrawal from Northern Ireland. After 1974, opinion polls suggested consistent British support for withdrawal”<sup>49</sup> He added, “The reason the British public supported withdrawal was out of sympathy with the soldiers, too many had been killed and they were serving no purpose, not to mention the cost to the British taxpayer.”<sup>50</sup> Indeed, as outlined in the MOD Operation Banner report, “As late as 1988, an Economist survey indicated that 28% of the mainland population wanted the troops withdrawn immediately, and a further 29% within a pre-set period: a total of 57% favouring withdrawal.”<sup>51</sup> These samplings of British public opinion demonstrate the missteps of 1969 through 1972 irreparably tarnished the perception of Operation Banner, even as steps to correct the situation began to take shape from the mid-1970s onward.<sup>52</sup>

## **Conclusion**

From 1969 to 1972, the British Army found itself in the unenviable position of attempting to mediate an extraordinarily complex conflict generations in the making. Even if the troops had received specialized training and adequate preparation, the task was herculean. The decision by British political leaders to employ a force lacking proper preparations and postured for external defense is worthy of scrutiny. The ultimate purpose of the armed forces in any democratic nation is to protect the people. While it can seem appropriate to call on the military to restore order in times of crisis, there are certainly successful instances of it in history,

<sup>49</sup> Dixon, “A real stirring in the nation,” 43. Pulled from a 24 September 1971 NOP poll for the Daily Mail.

<sup>50</sup> Dixon, Paul. “Hearts and Minds”, 463. September 1978 Gallup poll.

<sup>51</sup> UK Ministry of Defence, “Operation Banner,” 8-14.

<sup>52</sup> Thornton, “Getting It Wrong,” 104–105.

political leaders must exercise careful judgment to know the difference between employing soldiers to contain a crisis and employing soldiers to impose haphazard policy. The deployment of British troops to Northern Ireland in 1969, and their subsequent operations through 1972, serve as a lesson on how extended use of military means during a political crisis often exacerbates tensions. While a political peace process ultimately ended the Troubles in Northern Ireland, at least on paper, it is important not to take this as vindication for the extended deployment of the Army.

Mistakes were made, lives were tragically lost, and conflict was ultimately prolonged because political leaders arguably did not use the right tool for the job.

# **Let's Talk about Sexual Assault in the United States**

## **Military: A Comparative Analysis of Non-Judicial Punishment and Response Training in Commanding Officers**

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### **Abstract**

*The American public, by and large, remains unaware of the disciplinary processes exercised by the U.S. military, in spite of how the dramatic rendition of courtroom trials as depicted in blockbuster movies and literature. Non-judicial punishments under Article 15 of the UCMJ remain the predominant vehicle for the discipline of American troops: a process which is hardly transparent or procedural and seemingly permits the sexual assault of civilians and female servicemembers to proliferate. On the other hand, Article 15 is often heralded for its utility in quickly and efficiently settling matters without complicating processes unnecessarily. This report offers a nuanced take on the strengths and drawbacks of non-judicial punishment, including comparative analysis and specific policy recommendations.*

The average viewer of modern American cinema has likely acquired a conception of military justice as if it were highly procedural. War movies have painted a picture of court trials that are lengthy, thorough, and sensational. When it comes to depositions and judicial procedures, these depictions aren't necessarily inaccurate. What most observers will not realize, however, is that such court proceedings are rare – indeed, most disciplinary issues in the military are settled with no judicial intervention whatsoever.

Certain military procedures of punishment and prosecution impose a different standard of conduct on servicemembers as opposed to the general population. Particularly, under Article 15 of the Uniform Code of Military Justice, servicemembers who commit war crimes or violate human rights are exempt from judgment under the court system and are instead punished solely at their commanding officer's discretion. This system has received praise for its ability to process a high volume of disciplinary issues at a low cost while remaining at a personal level.<sup>1</sup> Indeed, there are several reasons that Article 15 can be an effective method of discipline, which will later be reviewed at length. However, a host of systemic issues have ultimately crippled the Article 15 remedy, including the enabling language of the Article itself. Systemically, Article 15 has led to a certain degree of exemption from legal consequences for servicemembers, particularly repeat offenders, and has led to the proliferation of rape culture throughout the U.S. military, the deliberate concealment of disciplinary issues, and ultimately failed to mitigate offenses effectively. Before examining how non-judicial punishment under Article 15 has enabled systemic failure, however, it may be prudent to illustrate the gravitas of the problem itself.

<sup>1</sup> "...congressional actions and proposals to sharply modify the military criminal legal system to combat sexual assault and harassment [such as Article 15] provide both opportunity and necessity to reevaluate the fundamental need for and nature of the military criminal legal system." Fredric I. Lederer, "From Rome to the Military Justice Acts of 2016 and beyond: Continuing Civilianization of the Military Criminal Legal System" (2017). Faculty Publications. 1943. <https://scholarship.law.wm.edu/facpubs/1943>.



During the fiscal year of 2010, military services received reports of 2,617 instances of sexual assault.<sup>2</sup> However, the Department of Defense (DOD) estimates that no more than 14% of servicemembers who are victims of sexual assault file a report with military authorities.<sup>3</sup> As a result, U.S. authorities estimate that the true number of sexual assaults upon servicemembers in the 2010 fiscal year was closer to 19,000.<sup>4</sup> Is it fair to say, then, that the prevalence of rape culture is due not to procedures, but to a lack of reporting? No way! Rather, a study of servicewomen who experienced sexual assault revealed that the primary reasons victims chose not to report were: 1) a lack of confidentiality; 2) adverse treatment by peers; and 3) a belief that nothing would be done.<sup>5</sup> Of these three reasons, at least the first and third are inherently tied to procedural inadequacies. Therefore, in order to remedy the issues of reporting and proliferation, it becomes necessary to examine punitive procedures within the military, conduct a comparative analysis of the most common domestic procedures, and consider potential reforms in both law and culture.

Most commonly, military discipline takes the form of non-judicial punishment (NJP), a procedure which, in the United States, is authorized under Article 15 of the Uniform Code of Military Justice.<sup>6</sup> Effectively, the two terms are colloquially and legally synonymous. Under Article 15, non-judicial matters are settled solely between the commanding officer and the offender and involve no courtroom procedures. This principle in itself poses a systemic issue, as most

<sup>2</sup> Sexual Assault Prevention and Response Office (SAPRO), Department of Defense Annual Report on Sexual Assault in the Military, Fiscal Year 2011 (2012). <http://www.sapr.mil/media/pdf/reports/>; Complaint for Plaintiffs, 28.

<sup>3</sup> *Ibid*, 181.

<sup>4</sup> FY2010 spans October 1, 2009, through September 30, 2010. Sexual Assault Prevention and Response Office (SAPRO), Department of Defense Annual Report on Sexual Assault in the Military, Fiscal Year 2010 (2010). <http://www.sapr.mil/index.php/annualreports>.

<sup>5</sup> A. Burgess, K.B. Wolitzky-Taylor, D.G. Kilpatrick, R. Bachman, K. Houser, L.M. Rock, B.S. Fisher, et al. "Reporting Sexual Assault in the Military: Who Reports and Why Most Servicewomen Don't." *American Journal of Preventive Medicine*, May 19, 2014. <https://doi.org/10.1016/j.amepre.2014.03.001>.

<sup>6</sup> "What Is the Most Common Type of Military Discipline?" Joseph L. Jordan Military Defense Attorney at Law, March 15, 2022. <https://www.jordanucmjlaw.com/2022/03/what-is-the-most-common-type-of-military-discipline/>.

military officers do not appear to be properly equipped to address cases of sexual violence. In 2014, the Department of Defense found military officers have repeatedly encouraged victims to drop the issue (44% of cases) or declined to take action whatsoever (41% of cases).<sup>7</sup> Additionally, researchers have raised concerns that military officers may lack legal expertise, be biased towards or against the accused and/or the victim, or present the potential for abuses of power over those providing testimony.<sup>8</sup> These concerns are sufficient to raise doubts over whether leaving interpersonal disciplinary issues up to commanding officers is tenable, even on the conceptual level.

In addition to problems with commanding officers themselves, even the face of the text of Article 15's guidelines and procedures reveals striking inadequacies. For example, the maximum punishments set forth within the Article are ridiculously lax, providing no option for discharge or even a permanent injunction. Indeed, a guilty ruling via Article 15 lasts on an offender's record for no more than 2 years.<sup>9</sup> Beyond this, the maximum punishments for an offense are: 1) one demerit; 2) a fine of  $\frac{2}{3}$  of a month's basic pay; 3) 8 days confinement; 4) a verbal reprimand; 5) 7 day extra duty; 6) 7 day restriction.<sup>10</sup> These figures should be jarring to any reader who has experienced the effects of sexual assault. So inadequate are these maximum punishments that even if the social issues with dispassionate commanding officers were to be resolved, even the sheer limitation of maximum punishments are factors which alone would be enough to absolutely stymie the administration of justice for victims of sexual assault. Perhaps it may even be true that the

<sup>7</sup> Jill A. Rough, and David J. Armor. "Sexual Assault in the U.S. Military: Trends and Responses." *World Medical & Health Policy* 9, no. 2 (2017): 206–24. <https://doi.org/10.1002/wmh3.228>.

<sup>8</sup> Cassandra E. Dodge, Rachael A. Powers, and Jacqueline Leon. "Reforming the Role of the Convening Authority in the Military Justice System." *Family & Intimate Partner Violence Quarterly* 15, no. 2 (2022): 79–90.

<sup>9</sup> "Article 15 Fact Sheet." Indiana National Guard. Accessed July 15, 2023. [https://www.in.gov/indiana-national-guard/files/Article\\_15\\_Fact\\_Sheet.pdf](https://www.in.gov/indiana-national-guard/files/Article_15_Fact_Sheet.pdf).

<sup>10</sup> *Ibid.*

reluctance of commanding officers to engage in disciplinary procedures is due to their knowledge that the consequences available would be ultimately ineffective. Taken together, these two issues have led to an American military justice system that is undeniably broken.

The inadequacies of the military's response to sexual violence are more than just a social issue affecting the victims; they are a systemic failure which is representative of a larger fracture in commanding authority. Indeed, in the 2010 Annual Report of Sexual Assault in the Military, the DoD acknowledged that issues of rape and sexual assault are severe enough to impair the military's readiness and impede mission accomplishment.<sup>11</sup> It then becomes a national issue, not just for those directly affected by sexual assault, but for the entire U.S. population that the prevailing issues of rape culture in the military are resolved in pursuit of a more efficient and productive military.

### **NJP within a Comparative Lens**

Repeated failures under the system of non-judicial punishment have led some researchers to conclude that the United States should do away with Article 15 and the imposition of non-judicial punishment in more serious cases, instead favoring the more common international doctrine of command responsibility.<sup>12</sup> Such procedures may include imposing stricter reporting requirements upon officers, prevent the use of Article 15 in cases of sexual and aggravated assault, and the prosecution of officers who fail to report offenses.<sup>13</sup> Several of these procedures have been implemented within the systems of foreign militaries, and comparative analyses may offer a lens of how punitive processes might look in the United States under a more limited application of

<sup>11</sup> *Supra* Department of Defense Annual Report on Sexual Assault in the Military, Fiscal Year 2010. At C-1, C-3.

<sup>12</sup> Lindsay Hoyle, "Command Responsibility — A Legal Obligation to Deter Sexual Violence in the Military." *Boston College International & Comparative Law Review* 37 (2014): 353–88.

<sup>13</sup> *Ibid.*

Article 15. Though it can be difficult to find countries for which there is extant research on punitive military procedures (eg. there has been no reporting or research on sexual violence in the UK military), we are lucky to find a detailed, well-researched counterexample in Israel's military system.<sup>14</sup>

Much like the United States, Israel is a liberal democracy whose social values and international ties closely mirror that of the U.S. Nevertheless, the two nations' military structures are markedly different. Whereas the U.S. has been criticized for "eroding" the separation of powers between executive and judicial apparatus under its system of non-judicial punishment, Israel's policy on the separation of powers is much more clearly delineated. Instead of allowing military commanders to make punitive decisions autonomously, Israel imposes strict requirements on commanders to report all instances of sexual assault to the judicial body immediately and bars those commanders from having any influence on the outcome of the case.<sup>15</sup> This system effectively delivers over all disciplinary issues to an independent authority and seeks to prevent any conflicts of interest created by workplace politics or any other sorts of limited interests. Additionally, Israel's system is so popular among military reservists that thousands have indicated that their service is conditional upon the independent powers of the judiciary, threatening to resign if the system is overturned.<sup>16</sup>

To more closely emulate this system, it would not be difficult at all for the United States to curtail or remove the use of Article 15 in cases of sexual assault. Historically, the reason that

<sup>14</sup> Louise Morgan, "Understanding sexual offences in UK military and veteran populations: delineating the offences and setting research priorities." *BMJ Mil Health* 168 (2022): 146-149.

<sup>15</sup> Emily Hazen, "Restructuring U.S. Military Justice through a Comparative Analysis of Israel Defense Forces." *Wisconsin Journal of Law, Gender, and Society* 34, no. 2 (2019): 179-206. <https://uwlax-omeka.s3.us-east-2.amazonaws.com/original/cbcaf16446f4a359ec1991001e55d183e68d92bc.pdf>.

<sup>16</sup> Doug Cunningham, "Israeli military reservists say they will stop serving if judiciary is weakened." UPI. July 21, 2023. [https://www.upi.com/Top\\_News/World-News/2023/07/21/reservists-protest-judicial-overhaul/4461689943283/](https://www.upi.com/Top_News/World-News/2023/07/21/reservists-protest-judicial-overhaul/4461689943283/) (Accessed June 21, 2023).

Article 15 has been used in such a broad context is because the language the Article uses to define its scope is greatly ambiguous. The Article sets forth that it authorizes the use of non-judicial punishment in instances of “minor offenses,” but does not detail what qualifies as a minor offense. If Congress were to explicitly define what constitutes a “serious offense,” it would have the power to render it impossible for Article 15 to be used in cases of rape, murder, and aggravated assault.<sup>17</sup> Consider for a moment: is it likely that Congress, when it authorized Article 15, intended for the Article to be used in cases of rape and murder when it used the language “minor offense”? It may be worthwhile for Congress to revisit the issue and clarify its intent, and if it wishes, bar the use of military non-judicial punishment for some of these more egregious crimes.

But would shifting to a system which more closely mirrors Israel’s separation of powers effectively curtail sexual harassment and other disciplinary issues? A report by Israel’s State Comptroller indicates that systemic failure is still widespread in the state’s military force. In 2021, 44% of complainants in sexual assault cases felt that the issue was not handled properly, and 26% reported that it was not handled at all.<sup>18</sup> Notably, the former figure (44%) is identical to the one cited by the United States DoD for mishandling of cases in 2014, indicating little to no decrease in systemic failures over the United States’ system of non-judicial punishment. These figures would support the conclusion that merely increasing the use of judicial systems in cases of sexual assault, as well as imposing stricter reporting requirements upon commanding officers, are insufficient to remedy the failure of punitive systems.

<sup>17</sup> Lindsay Hoyle, “Command Responsibility — A Legal Obligation to Deter Sexual Violence in the Military.”

<sup>18</sup> Josh Breiner, “A Third of Israeli Female Soldiers Were Sexually Harassed in 2021, Report Says.” Haaretz.com, November 28, 2022. <https://www.haaretz.com/israel-news/2022-11-28/ty-article/.premium/a-third-of-israeli-female-soldiers-were-sexually-harassed-in-2021-report-says/00000184-bee1-d136-affd-fff5ac590000> (Accessed July 20, 2023).

## **The Other Side of the Coin**

Additionally, it would be misleading to suggest that systems of non-judicial punishment, such as Article 15, are not without their benefits. The prospect of removing the use of Article 15 has been criticized for its potential to prolong the period of time before a fair judgment can be reached, as well as increasing the burden of proof upon the victim. Indeed, certain researchers have maintained that Article 15 increases the effectiveness of the justice process, allows for cases to be more swiftly adjudicated, and allows for victims to pursue justice without having to meet the higher burden of proof that judicial systems typically impose.<sup>19</sup> Under a lower burden of proof, it becomes possible for victims to pursue justice without producing a prohibitive amount of evidence – often, under the judicial system, an impossible standard to meet in cases of sexual assault.<sup>20</sup> Additionally, certain ex-military researchers have reported that the lack of an effective response to sexual violence is not due to non-judicial punishment under Article 15, but rather the failure to utilize its procedures altogether. According to ex-military scholar Fredric Lederer:

When I was an Army War College student, a survey that I conducted, concededly now quite dated, showed large numbers of commanders avoiding Article 15 in favor of other, quasi legal, informal procedures.<sup>21</sup>

<sup>19</sup> Jill A. Rough, and David J. Armor. “Sexual Assault in the U.S. Military: Trends and Responses.”

<sup>20</sup> Heather Waltke, Gerald LaPorte, Danielle Weiss, Dawn Schwarting, Minh Nguyen, and Frances Scott. “Sexual Assault Cases: Exploring the Importance of Non-DNA Forensic Evidence.” National Institute of Justice, November 9, 2017. <https://nij.ojp.gov/topics/articles/sexual-assault-cases-exploring-importance-non-dna-forensic-evidence>.

<sup>21</sup> Fredric I. Lederer, "From Rome to the Military Justice Acts of 2016 and beyond: Continuing Civilianization of the Military Criminal Legal System" (2017). Faculty Publications. 1943. <https://scholarship.law.wm.edu/facpubs/1943>.

The example provided above is, of course, an anecdotal one, but it reveals an observation which is strikingly central to the issue of resolving military reporting: if it is the case that commanding officers fail to make reports compliant with the terms of Article 15, then the Article itself is not responsible for the failure to remedy the U.S. military's rampant sexual assault problem. Rather, statistical indicators suggest that inadequate training on responses to sexual violence is one of the largest factors driving inappropriate behavior from commanding officers and perpetrators, as well as the crux of a crucial lapse in resources for victims.<sup>22</sup> According to independent research, exposure to comprehensive training across all military branches, ranks, and genders produced lower sexual assault incidence and superior knowledge (albeit at varying rates by demographic).<sup>23</sup> This conclusion runs contrary to the DoD's assertion that sexual assault training for active duty members is currently "effective," revealing the purportedly paradoxical nature of sexual assault occurrence despite the administration's "best efforts."<sup>24</sup>

Training alone, however, cannot be said to be the only necessary measure to remedy the widespread failure of sexual assault response systems. Effective, standard procedures must be in place to ensure that punitive responses meet a uniform standard and are not variable or inadequate at lower levels. Let us revisit the advantages as well as the flaws of Article 15 and further underscore that reform of non-judicial punishment is preferable, at least in cases of sexual violence, to judicial trial at court martial.

The inability of traditional judicial measures to deliver justice in cases of sexual assault is largely due to the aforementioned burden of proof, an evidentiary standard that is difficult to meet

<sup>22</sup> Kathryn Holland, Caridad Rabelo, Verónica, and Cortina, Lilia. "Sexual Assault Training in the Military: Evaluating Efforts to End the "Invisible War"." *American Journal of Community Psychology* 54(3-4): 289–303. doi:10.1007/s10464-014-9672-0.

<sup>23</sup> *Ibid.*

<sup>24</sup> *Supra* Department of Defense Annual Report on Sexual Assault in the Military, Fiscal Year 2010. At 104.

in a crime that involves no weapons, has no witnesses, and is often subject to conflicting testimony. An analysis of sexual assault cases on United States military bases in Japan revealed that in 2018, only 10% of sexual assault cases were successfully referred to face trial at court martial.<sup>25</sup> Literature reviews indicated insufficient evidence and low conviction rates as the reason behind reluctance to utilize traditional judicial systems, as well as the existence of informal and non-judicial punitive procedures.<sup>26</sup>

As Lederer indicated, however, informal and non-judicial procedures do not always include Article 15 punishments; commanding officers may opt to address the issue wholly under-the-table, or decline to take action whatsoever. Recall that 41% of sexual assault cases were found to have received no action whatsoever – not even a verbal reprimand properly filed under Article 15.<sup>27</sup> Indeed, it appears that the primary issue is not that Article 15 punishments (though ostensibly inadequate) are being implemented too broadly, rather that they are not being implemented at all.

### **Opportunities for Reform**

The push to reform, rather than negate, non-judicial punishment under Article 15 has been headed by several veteran researchers, who argue that non-judicial punishment is the best available option to simultaneously support administrative flexibility and fairness to all parties. Recommended reforms include decreasing, rather than increasing, reporting requirements upon commanding officers, increasing the maximum punishments available under Article 15, more properly defining the scope under which Article 15 may be utilized, and limiting the number of times that an individual can receive non-judicial punishment before deferral to court-martial.

<sup>25</sup> Carloyn Warne, Mia Armstrong, “The Role of Military Law and Systemic Issues in the Military’s Handling of Sexual Assault Cases.” *Law and Society Review* 54(1): 265–300. doi:10.1111/lasr.12461.

<sup>26</sup> *Ibid.*

<sup>27</sup> Figures per the Department of Defense. Jill A. Rough, and David J. Armor. “Sexual Assault in the U.S. Military: Trends and Responses.”



Research indicates that the failure of military commanders to satisfy reporting requirements under Article 15 is in large part due to the tremendous effort and amount of paperwork required to satisfy the provision.<sup>28</sup> We have seen that under Israel's military justice system, increasing reporting requirements and scrutiny upon commanding officers has done nothing to increase the overall effectiveness of sexual assault response relative to the United States, although it has marginally improved the amount of cases filed.<sup>29</sup> Further, extensive documentation has been performed in the U.S. military, which proves that removing discretionary authority from commanding officers disrupts the chain of military authority and leads commanders to exercise improper influence upon case decisions, damaging the independence of convening authorities. The result of a progressively less discretionary approach to sexual assault in the United States has been the opposite of the effect intended by Israeli provisions, such that the independence and transparency of administrative associations are demonstrably weakened rather than strengthened.<sup>30</sup> Together, these three sources support the hypothesis that increasing the amount of filings and reporting processes necessary to deliver punitive justice in no way facilitates the effectiveness of non-judicial punishment as a vehicle for responsiveness to sexual assault in the military. Rather, the solution suggested by both Lederer and Murphy, those with personal experience in the system, indicates that disciplinary issues are more effectively resolved when the influence of commanding authority is transparently acknowledged and filing requirements are made less complex.

<sup>28</sup> Francis A. Gilligan, Fredric I. Lederer. "Court Martial Procedure § 8–21.20" (2015). 4th ed. ISBN 978-0327049203.

<sup>29</sup> Josh Breiner, "A Third of Israeli Female Soldiers Were Sexually Harassed in 2021, Report Says."

<sup>30</sup> Major Elizabeth Murphy presents an in-depth discussion on how removing discretionary authority from commanders and increasing social pressures leads to increased corruption within the military, including the improper exercise of control over filings, trial proceedings, decision-making, and the implementation of punishment. See Elizabeth Murphy, "The Military Justice Divide: Why Only Crimes and Lawyers Belong in the Court-Martial Process" (2014). *Military Law Review* (220):129–190. <https://whitecollarblog.mmwr.com/wp-content/uploads/sites/4/2014/07/major-murphy-article.pdf>.

In return for the elimination of prohibitive filing requirements, increasing maximum punishments under Article 15 may elevate the level of available justice to one that more closely reflects the international standard. While detention or confinement is limited to a maximum of eight (8) days under Article 15, punishments in the United Kingdom are provided for up to 28 days with an extension to 90 days if approved by a higher authority.<sup>31</sup> Other possible increases include heftier fines, longer periods of extra duty, and longer restrictions. Coupled with increased sensitivity training and procedural awareness for commanding officers, these punishments stand to be implemented more effectively at the discretion of officers who are experienced with their subordinates and the reality of the situation.

We discussed earlier the issues of scope inherent within Article 15, such as the failure to define what constitutes a “minor offense.” Because statutory provisions cannot be unilaterally defined by anyone but Congress, military administration is left powerless to reduce the ambiguity of this term.<sup>32</sup> Nevertheless, with or without legislative action, it is important to ascertain under what circumstances Article 15 is best used in order to exercise effective control over punitive issues, allow for fairness to victims, and increase the effectiveness of military operations. We have determined that, due to the prohibitive evidentiary standard, it is not desirable to refer all cases of sexual violence to trial at court-martial. However, it seems misleading to continue to classify violent crimes such as sexual and aggravated assault under the umbrella of “minor offenses” as provided in the Article’s text. To be more linguistically precise without forcing disciplinary issues

<sup>31</sup> Frederic I. Lederer (2017). At 538. *Citing Military Jurisdiction, Courts and Tribunals Judiciary*, <https://www.judiciary.gov.uk/about-the-judiciary/the-justice-system/jurisdictions/military-jurisdiction/> (Accessed May 22, 2017). Frederic I. Lederer, "From Rome to the Military Justice Acts of 2016 and beyond: Continuing Civilianization of the Military Criminal Legal System."

<sup>32</sup> Article 15 is a constituent policy of the Uniform Code of Military Justice (UCMJ), a Congress-enacted and codified legal system. Congress retains the sole authority to modify statutory and codified U.S. law. *See* Rebecca Kheel, "Congress Faces Decision on Military Justice Overhaul." October 23, 2021. Military.com. <https://www.military.com/daily-news/2021/10/23/congress-faces-decision-military-justice-overhaul.html> (Accessed July 21, 2023).

into traditional judicial contexts, it may be prudent to expand Article 15 to separately cover “serious offenses,” define which disciplinary issues are covered by each term, and respectively implement graduated maximum punishments. Preferably, this change would be implemented by Congress in order to preserve legal consistency, but the benefits of implementing distinct customs and procedures would still logically stand to be realized via informal military policy and proper, uniform response training.

Finally, the use of non-judicial punishment must be limited as an alternative to traditional justice, such that it cannot be used as a subterfuge to prevent issues from reaching trial that should otherwise be heard.<sup>33</sup> At times, criminal cases in the military may be more appropriately referred to court-martial if the matter requires substantive investigation, exceptional procedural awareness, or public transparency.<sup>34</sup> Thereby, systematic issues arise if judicial punishment is eschewed as a whole in favor of the abuse of a situationally inappropriate policy. It then becomes necessary to ensure that the implementation of judicial punishment does not altogether fall away due to the expansion of non-judicial measures. If prior suggestions to decrease reporting requirements upon commanding officers, alongside statistically-vetted increases in response training, are followed and the expected increase in reporting is observed, non-judicial punishment could even serve as an effective apparatus for documenting misconduct, which can then be compelled to discovery at trial by court-martial. In other words, an increase in paper trails left by discretionary non-judicial punishments could help provide evidence of prior misconduct to satisfy burden-of-proof requirements that traditional justice systems levy upon the prosecution.

<sup>33</sup> Fredric I. Lederer, "From Rome to the Military Justice Acts of 2016 and beyond: Continuing Civilianization of the Military Criminal Legal System." At 538.

<sup>34</sup> Elizabeth Murphy, "The Military Justice Divide: Why Only Crimes and Lawyers Belong in the Court-Martial Process," 129-190.

It then becomes obvious how, through reform, non-judicial punishment is best used in conjunction with traditional court systems, rather either being wholly eliminated or used as the sole basis for punitive justice.

## **Conclusion**

As it stands, the problem with sexual violence in the U.S. military remains rampant and is in no way effectively addressed by measures of non-judicial punishment, while simultaneously ignored almost entirely by judicial trial systems. Nevertheless, the solution to resolving punitive issues, while counterintuitive, is logically quite simple and corroborated by experienced military researchers. Rather than mirroring ineffective comparative systems, which increase the density of proceedings and put increased pressure upon commanding officers, statistics show that gently increasing the prevalence of awareness and response training is most effective in changing the behavior of military authorities in a constructive manner. Additionally, while non-judicial punishment is currently poorly defined under Article 15, effective implementation of victim-friendly procedures can be achieved either by legislative amendment or the gentle cultural overhaul of informal military procedures. Addressing the jarringly low amount of justice available under Article 15, however, as in the issue of inadequate maximum punishments, is an issue that will have to be taken up by legislative authority and reviewed for better application. Overall, while non-judicial punishment in the military is in dire need of reform, it is a necessary measure to provide efficient, tailored justice in issues of internal discipline and has the potential to increase access to justice for victims in a manner that courts, which levy upon the victim unattainable burdens of proof, never will.

# **An Examination of Slavery in Anglo-Saxon England**

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## **Abstract:**

*This paper examines the practice of slavery and the slave trade in England when it was ruled by the Anglo-Saxons, from the departure of Rome in the 5th century, to the conquest by the Normans in 1066. The vernacular language of the Anglo-Saxons was Old English, and it is documents written in this language that are the focus of research. Using the work of prominent medieval historians, a close study of legal, religious, and fictional text, an idea is gleaned of the practice of slavery in Anglo-Saxon England throughout their rule, and whether the rise of the Christian Church had an impact on the number of enslaved. Legal and religious texts frequently preach the immorality of slavery, but the reality of active slave ports as well as the language of the Wessex Gospels, imply that the concern of the English people was curtailing cruel slave masters, rather than slavery itself.*

The Anglo-Saxons were a Germanic people who ruled what is now England from the departure of Roman rule in the 5<sup>th</sup> century to the conquest by the Normans in 1066. Comprised of disparate territories whose borders shifted with time, Anglo-Saxon England was split into seven distinct chiefdom territories – East Anglia, Essex, Kent, Mercia, Northumbria, Sussex, and Wessex – led by warrior chiefs called *cyningas* (pronounced: kŭh-nĭng-gās). Long before the Normans though, slavery was interwoven into the fabric of English society for the entirety of the Anglo-Saxon period. While changing rulers often brought changing laws on the regulation and treatment of the enslaved, the institution itself remained. As the ground floor of the social hierarchy, these slaves left no known written account of their own. References to the enslaved can be found, however, throughout the written documentation in the native language of Old English. Using these, along with archeological and anthropological methodologies, historians are able to glean how the enslaved were considered and treated within England and what kind of work they might have done.

Historical research of the medieval era most often focused on the later centuries, after the Norman Conquest, which brought with it the zeitgeist of what is considered ‘medieval’ into England – castles, knights, serfs, and the manorial system of labor. Despite its marginalized representation, the Anglo-Saxons were a thriving and complex people who, in their six-century reign, developed many institutions and traditions that shaped the foundation of England and the greater United Kingdom. Among these foundations was an extensive institution of slavery, both domestic and overseas. With the Anglo-Saxon era being a relatively niche topic of research, scholarship within the subject is paradoxically rather broad. Historians will often either investigate the people as a whole, or the language of Old English as it relates to the linguistic shift from Saxon runes to the Middle English of later medieval and early renaissance periods. Although research into slavery of the Anglo-Saxons, and the Old English documents thereof, does exist, it is most often focused on the extreme cultural shift that came about after the Norman Conquest.

Much of what we know about Old English and Anglo-Saxon culture can be traced back to King Alfred the Great. One of the first historians of his own people, King Alfred ruled the kingdom of Wessex from 871 to 899. Alfred believed that literacy brought wisdom, and with this philosophy he personally translated, or had translations commissioned, of many texts into the vernacular of Old English. Crucial among these for the understanding of Anglo-Saxon England was the Venerable Bede's *Ecclesiastical History of the English People*, an account of the religious spread of Christianity within England,<sup>1</sup> and many excerpts from the Bible. This included the Ten Commandments from the book of Exodus, which preceded one of the first attempts for an English ruler to ground his own legal code with that of the Christian religion.<sup>2</sup> These translations aided in the dissemination of both information and standards of morality throughout England. Even if the common people could not read, they often received this information orally from those who could.

Perhaps his most famous contribution to Anglo-Saxon history was King Alfred's *Anglo-Saxon Chronicle*, a vast compendium of documents penned by various scribes in an effort to record the history of the English people from the departure of Rome onward.<sup>3</sup> King Alfred did not concern himself personally with the plight of the enslaved, being advantaged by the system himself, but the documents he created nevertheless contained a great many references and allegories that informed the way in which slaves were considered. The casual nature of their inclusion, in fact – often the punchline to a riddle or an incidental mention – only served to reinforce the ubiquitous nature of slavery itself. The institution was so intimately woven into daily life that it did not require attention or justification; the enslaved occupied a clear self-evident position in the social hierarchy. Whether or not these stories were 'true,' in keeping with the history that has been uncovered since their creation, does not affect

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<sup>1</sup> The Venerable Bede, *The Old English Version of Bede's Ecclesiastical History of the English People*, ed. Thomas Miller (Oxford University Press, 1890).

<sup>2</sup> "Laws of Alfred," The Anglo-Saxons, July 9, 2024, <https://www.theanglosaxons.com/laws-of-alfred-ps/>.

<sup>3</sup> Alfred the Great, *Anglo-Saxon Chronicle*, trans. James Ingram and J.A. Giles (c. 890; repr., CreateSpace Independent Publishing Platform, 2017).

their commentary on the nature of slavery within Anglo-Saxon England. Instead, their value comes in the assumptions one can extract on the intended audience's – the Anglo-Saxon's – familiarity with slavery and the enslaved.

The vernacular language of the Anglo-Saxons was Old English (or *englisc* (pronounced: āng-līsh) as they would have called it). This was the language King Alfred was concerned with when he campaigned to increase literacy. When searching for evidence of slavery within Anglo-Saxon texts, it is, therefore, imperative to have a base understanding of the vocabulary of Old English in relation to terms regarding enslavement or coerced labor. Historian David Pelteret was perhaps the foremost authority on this subject. His 1995 book, *Slavery in Early Mediaeval England*, offered an extensive vocabulary on the subject of slavery in Old English. Although, he, like most scholars on the subject, was focused primarily on the change that came about with the Norman Conquest, his philological and anthropological approach to the linguistics offered a valuable resource for those wishing to delve into more intricacies of the subject.<sup>4</sup>

Many different words were used throughout the Anglo-Saxon era to describe slavery, though the primary terms for 'slave' were *þeop* (pronounced: thē-ōw) and *þræl* (pronounced: thräll), with the latter becoming more popular into Middle English. Pelteret's book followed the etymology of these words, and the vocabulary that denoted the differing social ranks of the enslaved in an attempt to trace the shifting nature of slavery and the pejorative aspect of such labels. The word *pealh* (pronounced: wē-āl), for example, was used in the early Anglo-Saxon period to mean 'foreigner' and referred most often to the native Britons in the west. As England expanded, however, and encroached into what is now Cornwall during the 10<sup>th</sup> century, the word came to be synonymous with 'slave.' Pelteret posited that this change was a direct result of war captives' enslavement by the English. This could be

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<sup>4</sup> David Pelteret, *Slavery in Early Mediaeval England: From the Reign of Alfred Until the Twelfth Century* (Boydell Press, 1995).



contrasted with the word *þegn* (pronounced: thē-gŭn), which was a very high-ranking slave of a noble, or the king himself. Overtime, *þegn* came to hold such respect that it was no longer a rank of misfortune but a sought-after position, synonymous with the later medieval rank of knight.

Pelteret's examination of the minutia of Old English has, however, been criticized for being, at times, too exacting, drifting into semantics of meaning that, in practical terms, were negligible. *þeorcþeop* (pronounced: wĕrk-thē-ōw) was denoted in *Slavery in Mediaeval England* as a word to refer to slaves that were bound to a certain field for agricultural work, whereas *þeorcþyrðe* (pronounced: wĕrk-wŭrth-ĕh) was denoted as a word to refer to free people that were, nevertheless, similarly bound to an agricultural field for work.<sup>5</sup> As Alice Rio, author of *Slavery After Rome: 500-1100* elucidates, this difference, while no doubt real in the context of drawn out petitions to the king or his legal arbiters, was so miniscule that it likely held no meaning in regards to England's overall consideration of slavery.<sup>6</sup> In the *Domesday Book*, in fact – a massive census encompassing the whole of England commissioned by King William the Conqueror in 1066 – the Latin word *servus* is used. This word could mean either 'servant' or 'slave,' though modern translations use the latter. Regardless of exact meaning, the fact of there being only one category of bound laborer rather than two, speaks to the possibility of King William seeing no meaningful distinction between such nuances as the *þeorcþeop* and the *þeorcþyrðe*.<sup>7</sup>

Distinctions such as these were recorded for a reason, however, even if their definitions changed over time. While incidental in colloquial use and understanding, legal disputes often relied on such nuances, especially in a system of limited consistency and common law, in which the consequences of legal action could be as dire as one's freedom or life. Author of the 1898 legal classic

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<sup>5</sup> Pelteret, *Slavery in Early Mediaeval England*, 41-45; Blue Engine Web Development, "Old English Translator," <https://www.oldenglishtranslatorbeta.co.uk/>.

<sup>6</sup> Alice Rio, *Slavery After Rome, 500-1100* (Oxford University Press, 2017), 124 – 125.

<sup>7</sup> "Serf or Slave," Hull Domesday Project, <https://www.domesdaybook.net/domesday-book/data-terminology/peasantry/serf>.

*History of the English Law Before the Time of Edward*, Frederick Pollock, whose research only briefly discussed slavery, was nevertheless a foundational historian of English law. He elaborated on the legal instances in which one might enter into or exit slavery. The Anglo-Saxon's extremely local court structure led to an environment where linguistic minutia could be vital if a case were heard in the right place. Crime in Anglo-Saxon England, and the punishment thereof, was usually a private affair. Only large-scale disruptions were frequently brought to arbitration, such as murder, grievous harm, and livestock theft. Punishments were harsh but brief, and rarely involved imprisonment. Enslavement was not a habitual punishment, but for such crimes that might otherwise merit death, enslavement was seen as the merciful option. Enslavement, therefore, functioned as both a punishment for undesirable individuals, and a form of mercy for the penitent.

The other process of enslavement Pollock discussed most frequently was self-selling into slavery, which happened in cases of extreme impoverishment when one had no other recourse for subsistence. Slavery in England was predominantly domestic in nature, perpetrated by the wealthy, which opened the possibility to surrender one's independence in exchange for regular meals and shelter. Other forms of enslavement were not expanded upon in Pollock's work, which was likely due to the work's focus on the written law, when other forms of enslavement did not have the same firm legal backing.<sup>8</sup> A linguistic example of this legal differential was *rihtþeop* (pronounced: rīt-thē-ōw), a word used primarily in law rather than common parlance, which referred to a slave that was obtained 'rightfully,' or through due process of the court, while the word *geþeopian* (pronounced: yēh-thē-ōw-ē-āhn) was used to mean the obtaining of a slave without that legal process. More laws were put to writing on the regulation of the enslaved once they had already entered the institution. Most telling of these was the prohibition on selling Christians overseas, which is to say, to non-Christians. In his own

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<sup>8</sup> Frederick Pollock, *The History of English Law Before the Time of Edward I: Volume I* (Cambridge University Press, 1895), 43 – 45.

book, Pelteret mentioned the apparent historical disposition to resist enslaving those who were considered their ‘own kind.’<sup>9</sup> With the increasing unification of the kingdoms of England and the rapid spread of Christianity, this concept could be used to explain the heightened regulation against English slaves owned by the English.

King Æthelred II, who ruled Wessex from 978 until 1016, forbade the selling of Christians to ‘heathens’ overseas, and this condemnation was echoed in the homilies of Pulfstan (pronounced: wūlf-stān), who was Archbishop of York at the same time. However, this ordinance seemed ineffective, as Pollock recorded that nearly every port city in England, along with London, was a primary market for slaves. This, along with the necessity to repeat the same prohibition in both the laws of King Cnut (r. 1018-1028) and King William (r. 1066-1087),<sup>10</sup> implied the continuous breaking of this ordinance. The account of Imma of Northumbria, a *þegn* owned by Æthelred II, reinforced the idea of a continued slave trade. As told by Bede in his *Ecclesiastical History*, Imma was wounded in battle and imprisoned in Mercia with the intention of being sold overseas before his noble background was discovered, at which point he was returned to his family.<sup>11</sup> Though attributed to divine intervention in the tale, if the account was based in truth it was likely that Imma was ransomed back home, as this was increasingly the way in which slave traders offloaded their human goods when they were lacking in buyers.

Rather than transporting captives overseas or holding them until a buyer could be found, it became increasingly popular as the Anglo-Saxon period progressed and the enslaving of Christians became less acceptable, for raiding parties to offer their captives back to their people, for a price. As a compromise between profit and piety, this practice allowed captors to sidestep the increasing taboo on Christian slaves by selling them back to their homelands, rather than selling them into labor. Pelteret, in his etymology, elaborated on *pergeld* (pronounced: wër-yæld), literally meaning man-

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<sup>9</sup> Pelteret, *Slavery in Early Mediaeval England*, 14.

<sup>10</sup> Pollock, *The History of English Law Before the Time of Edward I*, 43.

<sup>11</sup> Bede, *Ecclesiastical History*, 326-331.

payment, which was the price one would pay for someone's return. Although the alternative was enslavement, Pelteret emphasized the difference between this and *freogan* (pronounced: frē-ō-gǣn) which was the formal manumitting of a slave through payment, with the freed person thusly referred to as *freolæta* (pronounced: frē-ō-lǣt-ǣ).<sup>12</sup> This, another minor difference in wording, marked the lingering impression slavery left. When one was freed in this way, they were not classified as free, rather as a former slave. So pervasive was this practice of *pergeld* that Pulfstan of York lamented that funds for paying off *pergeld* were only available to the wealthy. For those who could not afford it, captivity could easily be extended into a de facto permanent condition.

Not only for raiding armies or captors, *pergeld* was also a formal system of payment in the court system. In a function similar to the modern institution of bail, in which money is forfeited to a bondsperson to ensure appearance in court, *pergeld* was a currency for human value, used to settle disputes or avoid punishment. As expounded in Rio's *Slavery After Rome*, in cases where the alternative was not execution – from which there was no redemption – slavery as a punishment for severe crime, most often a substantial theft, could be circumvented by the timely payment of the criminal's *pergeld* to the court. In a legal system with no reliance on precedent and a large oral tradition of common law, this allowed a degree of flexibility and exception in criminal sentencing, especially for those who had substantial financial or social resources. If either the criminal themselves or their guardian (most often, but not always, family) could not afford the *pergeld*, payment could be deferred. That deferment, however, came at the cost of enslavement for the duration. In brief, an individual could enter a state of bondage, colloquially, if not legally, indistinguishable from enslavement, until a payment was made in full. This was another way in which one might obtain a *rihtpeop*, a person enslaved through the legal system of the court.<sup>13</sup>

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<sup>12</sup> Pelteret, *Slavery in Early Mediaeval England*, 44.

<sup>13</sup> Alice Rio, *Slavery After Rome, 500-1100* (Oxford University Press, 2017), 32-33, 68.

In Anglo-Saxon England, exiting slavery was just as common as entering it. Manumissions were a frequent occurrence that were seen as a generous and righteous endeavor, though this tended to apply only when freeing the slaves of others, or upon the owner's death. Nearly all scholars of medieval slavery include the reading of manumission documents, though some, such as Pelteret and John Blair, author of *The Church in Anglo-Saxon Society*, were focused more on the way in which the Christian Church influenced the rate and manner of manumission. Pelteret, who believed slavery disappeared from England after the Norman Conquest, held Christian influence high on his reasons for it doing so. In his study, he quoted frequent sermons and homilies that preached the morality of manumission.<sup>14</sup> However, in his same study, Pelteret quotes the Wessex Gospels, a translation of the four gospels of the Christian Bible in Old English. This translation refers to those who serve Satan as his *prælas* (pronounced: thräll-ās), an increasingly pejorative word for a low class of slave, while those who serve God are referred to as his *pegnas* (pronounced: thē-gŭn-ās), a high class of slave that held predominantly positive connotation.<sup>15</sup> The prerogative of the Christian Church in the Anglo-Saxon era seemed, therefore, to place a firm distinction between 'good' and 'bad' forms of slavery, and not question the morality of slavery itself.

In a more nuanced view, Blair acknowledged that the church's clergy, as individuals, did not seem to promote any sort of abolition, but maintained that large scale manumission was an integral part of early medieval Christianity. The church incorporated regular ceremonies, especially in the 1000s, that freed large numbers of slaves at one time.<sup>16</sup> He proposed that these ceremonies, and the encouragement of frequent manumission, especially in the form of last wills, contributed to the decline of slavery in England overall. Wills were indeed a plentiful source of manumission, for Rio used the reading of wills in her work to extrapolate the feelings of the church on the institution of slavery. The

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<sup>14</sup> Pelteret, *Slavery in Early Mediaeval England*, chap. 2.

<sup>15</sup> Pelteret, *Slavery in Early Mediaeval England*, 69.

<sup>16</sup> John Blair, *The Church in Anglo-Saxon Society* (OUP Oxford, 2005), 453.

mass freeing of slaves correlated with the granting of land to church owned property, and because of this Rio argued that both were religiously motivated. Some people, such as Þynflæd (pronounced: wūn-flād), a noble woman with a large estate, went so far as to mention those enslaved as a legal punishment specifically, stating that she, personally, had enslaved them. Rio argued that while Þynflæd owned the slaves, it was very doubtful that she had enslaved them all herself. Stating that she had freed them, therefore, along with the special mention of criminal slaves, gave her will a Christ-like ambition for redeeming both herself and the ‘sinners’ under her purview.<sup>17</sup>

The choice to manumit one’s slaves was entirely personal, with very few laws regulating the exit of slavery, beyond when a slave could afford to buy their own *pergeld*. While manumission was seen frequently in wills, it was only present in significant numbers in those wills that seemed to be seeking additional forms of salvation insurance, such as the giving of large numbers of items, structures, or land to the church. When a will bequeathed such assets to a relative, spouse, or heir for example, it was unlikely to accompany the freeing of slaves; rather, those slaves would join the other such assets in being passed along to the beneficiary.<sup>18</sup> This reinforced the assumption that mass manumission upon death, while very real for the slaves themselves, was largely performative and had little bearing on the individual’s moral consciousness regarding their ownership of said slaves. In Anglo-Saxon England to own slaves was a natural and ordinary occurrence – so too was making them free as insurance for heavenly entrance. As a part of his research, Pelteret also closely viewed wills, along with anecdotes and allegories involving religiously motivated manumission. Pelteret suggested that the rate of religiously motivated manumission was such that as the Anglo-Saxon era came to an end, there was an overwhelming number of newly freed individuals. These free people were above the rank of the enslaved, yet below the rank of those who had never been enslaved, a unique middle ground

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<sup>17</sup> Rio, *Slavery After Rome, 500-1100*, 68 – 69.

<sup>18</sup> Rio, *Slavery After Rome, 500-1100*, 114 – 117.

defined by the Old English word *læt* (pronounced: lăt). The *læt* were still dependent on their former owners, however, and frequently worked on the same property they had previously, bound *de facto* to the land, if not *de jure*.

With extensive manumissions, and the usage of the word *læt*, Pelteret posited that this explained the rise of serfdom after the Norman Conquest and the disappearance of slavery.<sup>19</sup> Rio, however, disagreed. She believed Pelteret was giving the church too much credit. While this in between class of individual certainly existed, the rate of manumission, religiously motivated or otherwise, would not have been high enough to create an entirely new demographic that superseded the previous.<sup>20</sup> According to Rio, Anglo-Saxon rhetoric against slavery, plentiful though it was, was used primarily as propaganda against non-Christian, non-English people. Although these stories featured the freeing of slaves, it was almost always a foreign land perpetrating the type of cruelty that would require intervention, whereas the English were benevolent and kind.<sup>21</sup> This was why the laws of Æthelred II forbade the selling of slaves overseas, but not slavery itself. Like the phrasing in the Wessex Gospels implied, slavery was not the evil Christianity was fighting, rather cruel slave masters.

Despite its heavy influence in the later centuries, the Anglo-Saxon's were not always followers of Christianity. Marc Morris, author of *The Anglo-Saxons: A History of the Beginning of England* used archeological evidence and linguistics of both Latin and Old English to explore the life and culture of the Anglo-Saxons. Although he rarely discussed slavery in his work, unlike many other early medieval historians, he did linger on the period before Christianity took hold in the 6<sup>th</sup> and 7<sup>th</sup> centuries. Before Christianity, the Anglo-Saxon's followed a polytheistic nature-based religious system, kept from their Germanic origins. This religion, like Anglo-Saxon Christianity, allowed for a slave class of people. Even less is known about the pre-Christianity institution of slavery, though one could assume it

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<sup>19</sup> Pelteret, *Slavery in Early Mediaeval England*, 44-45, 121.

<sup>20</sup> Rio, *Slavery After Rome, 500-1100*, 117.

<sup>21</sup> Rio, *Slavery After Rome, 500-1100*, 33 – 34.

functioned in a similar manner to the Vikings', who frequently raided the English for captives. As Morris explained, weapons were paramount to the Anglo-Saxons. The creation, maintenance, and retiring of weapons were all complex and critical aspects of the warrior led community. Burials, therefore, included personal weapons as grave-goods. The way in which Morris traced who was enslaved and who was free, therefore, was by tracking which burials did not include weapons; these were interpreted by Morris to be those of slaves, who did not own personal weapons.<sup>22</sup>

It was Morris, too, who connected an anecdote within Bede's *Ecclesiastical History* with the introduction of Christianity to England. Bede wrote of young boys from England sold as slaves in Italy, where they garnered the attention of a monk named Gregory. Enamored, this monk bought the boys. He then went on to become Pope Gregory the Great, who campaigned to bring Christian missionaries to the 'barbarian' lands of England. Following this was the first substantial shift into Christianity in England with the 597 conversion of King Æthelberht.<sup>23</sup> The very presence of Christianity within England relied on the extent international slave trade. Bede himself cast doubt on the validity of this tale, however, with the story having quite a few themes and motifs that were echoed in popular moralistic fiction. While the story itself was doubtful, in his analysis, Morris brought forward letters from Pope Gregory in 595 that might have inspired such a tale, in which the pope inquired as to the purchase of English slave boys, so that they might be raised in Italy as monks.<sup>24</sup> Regardless of its factual plausibility, to reproduce this tale Bede must have considered the presence of young slaves traveling as far as Italy from England to be sold, and those slaves being bought by a prominent Christian figure, to be so unremarkable as to be widely believed with credulity.

By the time of the Norman Conquest in 1066, Christianity was firmly established as the dominant religion in England. The Church's influence was already influencing and changing

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<sup>22</sup> Marc Morris, *The Anglo-Saxons: A History of the Beginnings of England* (Pegasus Books, 2021), 50.

<sup>23</sup> Bede, *Ecclesiastical History*, part 13 – 14.

<sup>24</sup> Morris, *The Anglo-Saxons*, 58 – 59.



prevailing attitudes on who, why, and for how long one could be enslaved, with increasing rhetoric, if not practice, of mass-manumission. Along with the multitude of cultural and structural changes William the Conqueror brought to England came a substantial change in the classification of slavery. Two theories dominated scholarship on Norman England slavery – that slavery disappeared entirely from England, or that slavery only transformed in its nomenclature and structure, in particular, that the new classification for ‘slave’ was ‘serf.’ The latter argument suggests, perhaps due to a desire to circumvent the growing taboo of enslaving Christians, the Normans merely redefined an existing restriction under feudal terms that placed Christians into forced labor while maintaining their legal, if semantic, freedom. This ambiguity reflects the difficulty in tracking the progress of slavery and coerced labor in legal systems that seek to obscure or soften the definitions while maintaining the practice.

To say that slavery disappeared from England would make it an aberration in the medieval world to an unlikely extent and would not account for the *servus* classification in the *Domesday Book*, which additionally used the word *villanus* to refer to the large number of unfree peasantry (as opposed to the freeman, which was referred to as *francus homo* or *socmannus*).<sup>25</sup> The theory that serfs were simply slaves by another name, likewise, would not account for the term *esclave* which was the Latin and Old French word that referred to the state of slavery existing before the Norman Conquest. If these pre-Norman slaves were simply called serfs, there would be no need for a separate classifier. Furthermore, this class of people could still be found in England after the Conquest, though in much smaller numbers and only on small estates.<sup>26</sup> Reminiscent of the distinction between *peorcþeop* and the *peorcpyrðe*, the distinction between serf, *esclave*, and *servus* may have been so small as to be indistinguishable to the contemporary worker. Nevertheless, the fact that there was a distinction, as

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<sup>25</sup> “Serf or Slave,” Hull Domesday Project; “Villager or Villein,” Hull Domesday Project.

<sup>26</sup> Pelteret, *Slavery in Early Mediaeval England*, 17.

marginal as it may have been, is evidence to the continuation of slavery into Norman England, changed though it may have been.

While historical research into slavery rarely focuses on the Anglo-Saxon era of England, and research into the Anglo-Saxons rarely focuses on slavery, historians on both subjects have contributed to the continuity of knowledge on Anglo-Saxon slavery. Utilizing historians of the era, such as the Venerable Bede and King Alfred the Great, historians have a foundation upon which to build a close examination of the vernacular language of Old English and the culture surrounding it. Changing vocabulary within the centuries of Anglo-Saxon rule reflected the changing status of the enslaved. A discriminatory reading of these works, along with a close familiarity of contemporary Old English documentation can reveal the views and opinions of the Anglo-Saxons themselves regarding slavery. The extensive, complex reality was that the Anglo-Saxon slave trade was integral to the economy of the seven kingdoms that constituted England under Anglo-Saxon rule.

# Looking Through a Mirror: Poulenc's Self-Reflection in *La voix humaine*

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## Abstract

*The monodrama is an underdeveloped genre in the field of Western classical music. Francis Poulenc (1899-1963), French pianist and composer, would have heard of only one example of a monodrama in his time, and yet he still decided to set the one-woman play La voix humaine (The Human Voice) to music. Having just written two operas that follow successful formulas, why did he deviate from this path? I argue that Poulenc saw a unique opportunity to express deeply personal feelings in La voix humaine. The troubled story of the main character coupled with the excellent performance by his muse Denise Duval would adequately express Poulenc's fascination with the female psyche, his failed romantic relationships, and his struggle with his homosexuality that plagued him for most of his life.*

Francis Poulenc's fascination with femininity, his obsession with the operatic diva, and the torment of his sexuality inspired him to compose within a consistently underdeveloped genre, the mono-opera *La voix humaine*. In many ways, writing a monodrama poses more challenges than rewards whereas the well-established framework of traditional opera has been proven successful over the centuries. Deviation from this formula suggests Poulenc wrote this mono-opera for deeply personal reasons. Through the single character of "Elle", the protagonist of Jean Cocteau's play, and with the perfect vocal conduit of Denise Duval, Poulenc conveyed his personal feelings, revealing aspects of his romantic relationships and mental health, both of which were lifetime struggles for him.

Monodrama or mono-opera are interchangeable terms for an opera that stars only one singing character throughout the show. It is a genre that is rarely explored in Western classical music. To date, fewer than 10 monodramas have reached any recognizable level of fame, at least half of which have been written in the 1950s or later, including Poulenc's contribution of *La voix humaine*. When comparing the number of compositions in this genre to the lengthy history of operatic compositions beginning in the 1600s, clearly monodrama is an underdeveloped genre. Most composers are unwilling to invest their time and talents in these types of projects, and understandably so. In a traditional opera, there are infinite possibilities to create visual and musical interest by having the various characters interact with each other. The powerful sound of the many singers is usually matched with an impressive and dense orchestra. The most notable advantage of a traditional opera is that the burden of the show's success is more evenly spread between the cast members.

In a monodrama, the composer must put their faith in the sole performer to make their work a success. The source material or libretto must be compelling, the vocal line must be

engaging to captivate the audience with the limited timbre and range of a single performer, the orchestra must not be too overpowering to hear the singer, and the chosen vocalist must be an incredibly capable actor. Even after ensuring that the source material and music are quality, a mediocre performance by the singer could make the opera a flop. Creating conditions for success in a monodrama is a risky and rarely rewarding move. And yet, these exact conditions were met within Poulenc's *La voix humaine*. Poulenc rediscovered the compelling source material in his longtime friend Jean Cocteau's one-woman play while his professional relationship with soprano Denise Duval had developed into a close friendship. The trust among these three creatives fostered an ideal setting for Poulenc to showcase Cocteau's writing and Duval's performance.

Poulenc and Cocteau first became friends in the 1920s with the formation of the now-famous composer friend group, "Les Six." While Cocteau was not a core member, he would collaborate frequently on creative projects with the six composers, providing texts to set to music. It was during this time when Cocteau was writing his early works that Poulenc first set some of the writer's poems to music. Poulenc enjoyed Cocteau's whimsical aesthetics that were written to highlight the gay camp style.<sup>1</sup> As a young person who was just beginning to live as an "out" gay man, this expressive style of writing highly appealed to Poulenc. As his fame increased, Poulenc's network of friends and colleagues in the arts expanded, allowing him to make friendships with other singers, instrumentalists, and poets who would help him develop his compositional style. Poulenc had plenty of male friends in the field, but he was especially drawn to talented women, with whom he made deep and long-lasting friendships. One woman Poulenc met in the 1930s and remained friends with for the rest of his life was poet Louise de Vilmorin.

<sup>1</sup> Keith Clifton, "Mots cachés: Autobiography in Cocteau's and Poulenc's *La Voix humaine*," *Canadian University Music Review / Revue de musique des universités canadiennes* 22, no. 1 (2001): 76, <https://doi.org/10.7202/1014499ar>

While Poulenc would frequently choose poems written by his friends Guillaume Apollinaire, Paul Éluard, and Max Jacob, Vilmorin was one of Poulenc's favorite poets, saying "Few people move me as much as Louise de Vilmorin."<sup>2</sup> He was captivated by her writing style; her poems were boldly expressive yet not so overwhelming to be unrelatable to the common reader. Compared to the work of great French poets such as Paul Verlaine and Charles Baudelaire that would inspire the huge genre of *mélodie* during the 19th century, Vilmorin's romantic expressions were more laidback and aloof. Despite her cool-headed nature, Vilmorin's work was criticized as too feminine, a critique that Poulenc would also receive as he frequently undermined the standard tonality made popular by German composers during the 1800s. Linked by the commonality of their artistry and aesthetics, Poulenc was thrilled to set her works to music, saying "The poems of Louise de Vilmorin provide material for truly feminine songs. That is what delights me."<sup>3</sup> Poulenc was never trying to fit into the mold developed by the great composers of the German Romantic era. Poulenc selected feminine texts and composed feminine music because they were the most authentic to his expressive style.

Poulenc's compositional style, characterized by his selection of text and musical choices, is most evident in his operas *Les Mamelles de Tirésias*, *Dialogues des Carmélites*, and *La voix humaine*. Each opera features women as the main characters; in the case of *Carmélites*, it has an almost all-female cast. Each story explores profound topics such as how to gain satisfaction from life, the importance of religious devotion in the face of death, and the intense suffering caused by losing the love of your life, all told from a female perspective. The characters in these stories express themselves authentically and with unashamed sentimentality, qualities of communication

<sup>2</sup> Francis Poulenc, *Diary of My Songs [Journal de mes mélodies]*, (London: Victor Gollancz, 1985), 37.

<sup>3</sup> Francis Poulenc, *Diary of My Songs [Journal de mes mélodies]*, (London: Victor Gollancz, 1985), 39.

that Poulenc valued in his own life and relationships. Poulenc experienced heightened emotions such as elated highs and depressive lows throughout his life due to his manic-depressive disorder.<sup>4</sup> While his condition caused him much suffering, it is also likely the reason Poulenc developed his compositional style of intense emotional lyricism, highlighted in his operatic works. Poulenc found the grand opera stage to be the perfect place to express feelings that were too large for ordinary life.

The operatic diva has been celebrated for centuries. It started with the creation of the "prima donna" or "first lady" of the opera. This would be one of the opera's main characters and the person with the most virtuosic and impressive passages of music. Over time, composers wrote even more challenging music for the *prima donna*, and the singers who acted in these roles began to accumulate huge fan bases. With the accumulation of fame, power, and status, the *prima donna* was transformed into the *diva*, from the Italian word "goddess." Divas were popular among all audiences, but gay men especially were drawn to worship these singers and actresses.<sup>5</sup> The concept of a diva became a reliable character trope in gay camp performative arts and remains largely unchanged to this day.

Poulenc was no exception to this trend of becoming enamored with the operatic diva. He attended the opera frequently and was supposedly struck with inspiration to write *La voix humaine* after attending a Verdi opera starring Maria Callas.<sup>6</sup> It was through his observation of

<sup>4</sup> Keith Clifton, "Mots cachés: Autobiography in Cocteau's and Poulenc's *La Voix humaine*," *Canadian University Music Review / Revue de musique des universités canadiennes* 22, no. 1 (2001): 81, <https://doi.org/10.7202/1014499ar>

<sup>5</sup> Keith Clifton, "Mots cachés: Autobiography in Cocteau's and Poulenc's *La Voix humaine*," *Canadian University Music Review / Revue de musique des universités canadiennes* 22, no. 1 (2001): 74, <https://doi.org/10.7202/1014499ar>

<sup>6</sup> Roger Nichols, "Joy, Suffering and Farewell: 1957-1963," in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 254. Though this may be true, Poulenc later says in an interview that he was inspired to look at the play after a recommendation by his friend Hervé Durgardin.

an opera rehearsal of *Madama Butterfly* that he met his future muse, Denise Duval. Impressed with her beautiful singing but more importantly, her capacity to portray complex emotions, Poulenc asked Duval to star in the premiere of his first opera *Les Mamelles de Tirésias*. The two of them quickly developed a close relationship and he chose Duval again for the lead role of Blanche in the French premiere of his next opera *Dialogues des Carmélites*. By the time Poulenc was working on his third opera *La voix humaine*, Duval was the natural choice for the role of "Elle," the main and only character. Duval took on more than a performing role in this opera, working directly with Poulenc while he was writing the music so that it fit her voice "more perfectly".<sup>7</sup> By this time their friendship had deepened such that Duval could critique Poulenc's work without causing resentment. One exchange between the two of them found Poulenc commenting in the rehearsal room that a phrase, "[sounded] 'un peu dur à mon avis' [a bit harsh in my opinion], to which Duval [replied], 'il est un peu dur parce qu'il est trop aigu' [it's a bit harsh because it's too high], and Poulenc duly [transposed] it down a third."<sup>8</sup>

Historical sources are quick to label Poulenc as gay, but like the people of the time, these sources often lack the language to accurately describe alternative sexualities with nuance. While Poulenc may have fit into the accepted gender binary, the society of his time had little framework for understanding a sexuality that was neither heterosexual nor homosexual. In modern terms, his sexuality would possibly be described as bisexual or fluid. He grew up in love with a female childhood friend, Raymonde Linossier, whom he wanted to marry, but was deeply impacted by her sudden death in 1930. He had a few notable relationships with men over the

<sup>7</sup> Roger Nichols, "Joy, Suffering and Farewell: 1957-1963," in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 256.

<sup>8</sup> Roger Nichols, "Joy, Suffering and Farewell: 1957-1963," in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 256.



years but fathered a daughter with a woman named Frédérique Lebedeff in 1946. Perhaps because he had already acquired a reputation as a gay man, or perhaps because his daughter Marie-Ange was born out of wedlock, Poulenc never publicly acknowledged that he had a daughter and instead claimed to be her godfather. Poulenc was in a relationship with career sergeant Louis Gautier when Poulenc passed from a heart attack in 1963.<sup>9</sup> Despite the growing acceptance of homosexuality by Parisians at the time, Poulenc was still under pressure from a largely Roman Catholic society to have more standard relationships that were centered on heterosexual monogamy. Raised as a devout Catholic, Poulenc may well have felt conflicted between his sexuality and his faith. The cognitive dissonance of trying to reconcile these two opposing aspects of his identity may have been what spurred him to express himself through his music.

Much of what Poulenc wrote demonstrated the pull between the two sides of his nature, one of a monk and one of a rascal.<sup>10</sup> Nowhere is this better demonstrated than in the contrast of two compositions written between 1945 and 1950. Written in 1945 and first performed in 1947, his first opera *Les Mamelles de Tirésias*, meaning *The Breasts of Tirésias*, is a surrealist *opéra bouffe* with an outrageous plot. After the main character Thérèse tires of being a submissive housewife, her breasts turn into balloons and fly away, changing her into a man named Tirésias. Just a few years after the premiere and success of this outrageous work, Poulenc composed a setting of *Stabat Mater* as a tribute to the passing of his friend Christian Bernard.<sup>11</sup> The Medieval

<sup>9</sup> Roger Nichols, “Joy, Suffering and Farewell: 1957-1963,” in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 251.

<sup>10</sup> Roger Nichols, “‘Liberty, I Write Your Name’: 1944-1952,” in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 203.

<sup>11</sup> Roger Nichols, “‘Liberty, I Write Your Name’: 1944-1952,” in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 199.

text explores the suffering of the Virgin Mary during Christ's crucifixion, a grief that may have mirrored Poulenc's own loss. Whether frivolous or sacred, this dual nature was consistently present in Poulenc's artistic and personal life. While that may have made it difficult to "fit in" to society, it made him a truly expressive artist capable of setting deeply emotional texts to music with great success. Two years before deciding to write *La voix humaine*, Poulenc composed the opera *Dialogues des Carmélites* in 1957, exploring the true story of a sect of nuns who chose to sacrifice their lives rather than give up their faith during the French Revolution. Poulenc found the mental fortitude and piety of the nuns admirable to the point of transformative, and it was the emotional experience of writing the opera, as well as Denise Duval's moving performance as Blanche, that readied him for the intensity of *La voix*.<sup>12</sup>

*La voix humaine* is the story of "Elle," or "She", a woman who is going through a breakup with her lover but is still clinging desperately to the happy memories they once shared. The entire opera consists of Elle speaking to her lover on the telephone; the audience never hears his side of the conversation. Elle is hopeful that her lover will return to her, but her hopes are crushed when it is revealed that he is answering the phone from his new girlfriend's home. Once Elle deduces this, she demands the truth from her lover who never reveals his location. The two of them lose the connection, literally as the phone line disconnects and metaphorically as Elle realizes that she has no chance to convince him to return to her. After this harrowing realization, she experiences a psychotic break and ends her life. Poulenc was intimately familiar with the deep sense of loss that the protagonist Elle experiences. Due to his manic-depressive disorder, Poulenc was frequently the more emotional partner in his romantic relationships and struggled to

<sup>12</sup> Denis Waleckx and Sidney Buckland, "'A musical confession': Poulenc, Cocteau and *La voix humaine*," In *Francis Poulenc: Music, Art and Literature*, edited by Sidney Buckland, 320–347. (New York: Routledge, 1999), 344.

find a partner who could withstand his unstable temperament. When his relationships ended, such as the ones with Richard Chanlaire and Raymond Destouches, Poulenc was thrown into depressive episodes that he would write about in letters to close friend Pierre Bernac.<sup>13</sup> Even when his relationship was going well, Poulenc couldn't help but have a negative expectation over how the relationship would eventually end, a similarity that he saw in the heroine Elle. This sentiment is displayed in a letter written by Poulenc, reading "Just as Blanche was myself, so She is again myself, in relation to Louis, because life will no doubt deprive me, in one way or another, of this angel."<sup>14</sup> Even though Elle's relationship and Poulenc's relationship with Gautier would have drastically different outcomes, Poulenc couldn't help but see himself as Elle due to his lifelong experiences of loss.

An important contributing factor to Poulenc writing only three operas in his lifetime is his discerning approach to selecting librettos for musical adaptation. Poulenc had high standards for the quality of the poetry and prose that he selected for his works, stating, "I need to believe in the words that I hear sung."<sup>15</sup> Poulenc stated in an interview that he first had the idea to look at Cocteau's play when it was recommended to him by his friend Hervé Dugardin.<sup>16</sup> Poulenc would likely already have heard of the play, as it was written during the early years of his and Cocteau's friendship, but it was because of this suggestion that he revisited the text. Poulenc felt an instant connection to the text of *La voix*, and when he decided to set it to music, he said that never had

<sup>13</sup> Keith Clifton, "Mots cachés: Autobiography in Cocteau's and Poulenc's *La Voix humaine*," *Canadian University Music Review / Revue de musique des universités canadiennes* 22, no. 1 (2001): 81, <https://doi.org/10.7202/1014499ar>

<sup>14</sup> Denis Waleckx and Sidney Buckland, "'A musical confession': Poulenc, Cocteau and *La voix humaine*," In *Francis Poulenc: Music, Art and Literature*, edited by Sidney Buckland, 320–347. (New York: Routledge, 1999), 321. Poulenc is referring to the characters Blanche from *Dialogues des Carmélites* and She/Elle from *La voix humaine*, as well as his partner at the time of writing *La voix*, Louis Gautier.

<sup>15</sup> Francis Poulenc, *Diary of My Songs [Journal de mes mélodies]*, (London: Victor Gollancz, 1985), 37

<sup>16</sup> Nicolas Southon and Roger Nicols, "Article XXXIII Interview with Henri Hell," in *Francis Poulenc: Articles and Interviews; Notes from the Heart*, (London: Routledge, 2016), 158.

he studied and adhered to the prosody of a text so intensely before.<sup>17</sup> It was of paramount importance to write music that allowed the intense emotions of the story to come through without interference from the orchestra. Unlike *Dialogues des Carmélites*, which took more than three years to finish, Poulenc finished the musical sketches and orchestration for *La voix* within six months.<sup>18</sup> As discussed earlier, his collaboration with Denise Duval to polish his initial ideas was a contributing factor to Poulenc's passion and speed for the project. After finishing the music, he wrote a letter to his friend Rose Dercourt-Plaut and spoke about his excitement for its premiere, calling it "a musical confession!!!".<sup>19</sup> Poulenc saw himself as the character of Elle, relating to her despair, her story, and the way that she expressed herself.

While it was a cathartic experience for Poulenc to express his emotions in *La voix*, he did so cleverly, obscuring the depth of his emotions under the exciting exterior of Elle's hysterical behavior. Unless the audience members knew of Poulenc's life and relationships, they would take the opera at face value and have no idea that Poulenc was using the opera as an embodiment of his experiences. This method of hiding emotional truth under the surface was intentionally developed by Cocteau, who wrote the play with the influence of the gay camp style, a form of expression that was increasing in popularity in Paris in the 1920s. Cocteau was also a gay man, though his experiences with romance and relationships were wildly different than that of Poulenc. Cocteau made no efforts to hide his sexuality and chose high-profile romantic partners, a choice that received some criticism from the more traditionally-minded public. Even amid

<sup>17</sup> Denis Waleckx and Sidney Buckland, "'A musical confession': Poulenc, Cocteau and *La voix humaine*," In *Francis Poulenc: Music, Art and Literature*, edited by Sidney Buckland, 320–347. (New York: Routledge, 1999), 344.

<sup>18</sup> Roger Nichols, "Joy, Suffering and Farewell: 1957-1963," in *Poulenc: A Biography*, (Connecticut: Yale University Press, 2020), 260.

<sup>19</sup> Denis Waleckx and Sidney Buckland, "'A musical confession': Poulenc, Cocteau and *La voix humaine*," In *Francis Poulenc: Music, Art and Literature*, edited by Sidney Buckland, 320–347. (New York: Routledge, 1999), 344.

potential backlash, Cocteau made a career out of his love for camp, using the style as inspiration for his films, his fashion, and several plays, including *La voix*. The influence of camp is apparent from the stage directions that Cocteau has written for the set. The room where Elle resides is supposed to be "une chambre de meurtre", or "a room of murder" and she is directed to be "étendue, comme assassinée", or "stretched out, as if murdered."<sup>20</sup> Cocteau had quick and dry humor and no doubt wrote these over-dramatic directions intentionally. Even the method by which Elle commits suicide is unbelievably dramatic. She lays in the bed, wraps the phone cord around her neck, and while murmuring "I love you" repeatedly, she drops the receiver, strangling herself. Poulenc kept the stage directions and how Elle ends her life intact, signaling that he too appreciated the campy style in which the play was written. Poulenc and Cocteau preferred that only those audience members who could see beyond the flashy surface of the work would understand their true intention of expressing intimate parts of their lives and relationships.

Francis Poulenc's manic-depressive disorder affected multiple aspects of his life, making it especially difficult for him to maintain romantic relationships. Although he often remained friends with his former lovers, Poulenc couldn't help but feel that he had failed as a partner, and this feeling of defeat inevitably impacted the success of his subsequent relationships. His struggle with the conflict between his sexuality and his religion is vividly reflected in his compositions, where he sought to express both sides of his personality. Poulenc's collaboration with his muse, Denise Duval, was particularly significant. He became enamored with her expressive capabilities and utilized her talents as an extension of himself. For Poulenc, Duval represented the perfect voice to express the intense feelings of Elle, a character in whom he saw

<sup>20</sup> Keith Clifton, "Mots cachés: Autobiography in Cocteau's and Poulenc's *La Voix humaine*," *Canadian University Music Review / Revue de musique des universités canadiennes* 22, no. 1 (2001): 78, <https://doi.org/10.7202/1014499ar>

his own reflection. Ultimately, Poulenc wrote *La voix humaine* because he identified with Elle's romantic struggle, using the opera to personify his feelings and achieve a cathartic release.

# A Brand-New Cowboy

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## Abstract:

*Over the past century, the cowboy has become a near mythic figure in American popular culture. From his distinctive hat to his signature six-shooter, and even on to his gruff demeanor, the cowboy has left a mark on the American media landscape. As the country moves into the 21st century the traditional narratives of the cowboy have started to be critiqued, changed, and co-opted by groups beyond the traditional. From music groups like the Village People, to box office hits like Django Unchained, the archetypical cowboy is being updated to mesh more with a modern audience that is more diverse, and more accepting, than before. Through this change the cowboy, and those that revere him, have had to contend with, and have pushed back on the evolution he has undergone. In this new world does the cowboy still retain his place?*

For generations of Americans, the cowboy, and his Wild West mystique, is a central part in the story of America. Through exposure in television, film, and other forms of media, the cowboy has attained an iconic status that speaks of a bygone time where real men rode horses, fought bad guys, and saved damsels in distress. This imbued within the concept of the cowboy a meaning that went beyond his belt buckles, spurs, and cowboy hat. The cowboy became an avatar for all of the socially accepted facets of masculine culture and broadcast them to a national audience that readily devoured it all. In the 21<sup>st</sup> century, this meaning has been undergoing a new shift as other identities seek to make claims on a definition of masculinity that seeks to distance itself from white, straight men. The time for the Black cowboy, the Gay cowboy, the cowgirl has come as these respective groups seek to make that iconic image into their own likeness, despite a growing backlash that seeks to put the genie back into the bottle and return to the old ways.

It is impossible to separate the cowboy from the genre of the Western. The legendary figure that became so widely known today would not have been so without the golden era of the Western, from the 1930s to the 1950s. During this time “Westerns accounted for 20 and 35% of Hollywood features produced between 1935 and 1959.”<sup>1</sup> This made it far and away the most popular genre of the period and it is during this time that major movie stars and feature films would define the era. Perhaps the most iconic of all of these actors was John Wayne, the Oscar winning Iowa native who, for many, stands as household standard for a cowboy movie star.<sup>2</sup> Throughout his long career he starred in many of the most iconic films of the American West, *Stagecoach* (1939), *McLintock!* (1963), and *The Searchers* (1956), to name a few.<sup>3</sup> For

<sup>1</sup> Pete Falconer, *The Afterlife of the Hollywood Western* (Palgrave Macmillan), 3-4, [https://doi.org/10.1057/978-1-137-54671-5\\_1](https://doi.org/10.1057/978-1-137-54671-5_1).

<sup>2</sup> “John Wayne,” IMDb, accessed May 9, 2025, <https://www.imdb.com/name/nm0000078/>.

<sup>3</sup> Levi Meyer, “20 Greatest Western Films of All Time,” The 20 Greatest Westerns Ever Made, accessed May 9, 2025, <https://centerofthewest.org/2020/04/30/best-western-films/>.



generations of Americans, his swagger, shooting, fighting, and hard-nosed determination was the cowboy, and in turn was also stereotypically what every American man should strive to be.

The legend of the cowboy was rooted in the idea that “the western frontier will save America from becoming over-civilized, effete, and decadent.”<sup>4</sup> In examining the 1902 novel, *The Virginian*, by Owen Wister, author John Jennings places the book into its context as a tool of creation, a birthplace for the heroic cowboy. The original book is credited by Jennings as the catalyst that set in motion the incredible rise to prominence of the cowboy to fame and glory, but it is not the only book to generate attention. Historian Walter Prescott Webb is another major figure in the popularization of the West and of the cowboy as iconic figures.<sup>5</sup> His books on the Texas Rangers, the Frontier, and on the West in general were extremely popular and helped to push into the national stage the image of the horse riding, six-shooter carrying figure that would spur on the golden age of the Western.<sup>6</sup>

This is the backdrop against which we find ourselves in the 21<sup>st</sup> century, a near century long celebration of the white, heteronormative hero figure of the cowboy. The first group to strike out at the turn of the millennium was the Black community as stars like Will Smith and Jaime Foxx took roles in movies that sought to center Black men in cowboy hero role that had been so typically white. This shouldn’t come as a shock to anyone who viewed Westerns, there had been Black actors in Westerns playing cowboys since *Sergeant Rutledge* in 1970.<sup>7</sup> But, these

<sup>4</sup> John Jennings, *The Cowboy Legend: Owen Wister’s Virginian and the Canadian-American Ranching Frontier* (University of Calgary Press, 2015), 15.

<sup>5</sup> Webb wrote and published on the American West prolifically throughout his entire writing career. His books *The Great Plains*, *The Great Frontier*, and *The Texas Rangers: A Century of Frontier Defense* became defining books that shaped not only popular perceptions on the life of Americans during the period of westward expansion, but also centered the frontier concept as key to understanding American history.

<sup>6</sup> Necah Stewart Furman, “Walter Prescott Webb: Pioneer Historian of the American West,” *Handbook of Texas*, 1976, <https://www.tshaonline.org/handbook/entries/webb-walter-prescott>.

<sup>7</sup> “Blazing Saddles,” IMDb, accessed May 9, 2025, <https://www.imdb.com/title/tt0071230/>.

Black cowboys often fell into roles that were either comic relief or served to help the main character, who was white. This tracks with the actual scholarship that has shown repeatedly that despite being “very well hidden”<sup>8</sup> and that they were “almost totally ignored by the mythmakers of the Eastern publishing houses and the Hollywood movie sets.”<sup>9</sup> The 21<sup>st</sup> century bucked that trend and made them a new centerpiece for the cinema.

Smith and Foxx’s characters in *Wild Wild West* and *Django Unchained* are both the central heroic figures of the story, allowing a Black character to no longer take a backseat to their white counterparts. Quentin Tarantino, director of *Django*, in an interview to NPR goes on to say that he intentionally made Django a slave to give him a heroic journey, an enslaved protagonist overcoming the victimization and setting off on a quest to get payback for what was done to him.<sup>10</sup> The cowboy motif had been brought out of the white bubble that it lived in, and infused with a new “Blackness” it reimagined the iconic figure of the cowboy as a Black hero figure. The cowboy was slowly becoming more aligned with his historical reality, the recognition of the historic figure of the Black cowboy was mainstreamed.

The Black community was not the only minority community that sought to make their claim to the icon of the American Cowboy. The gay community also pushed to remake the Cowboy into their image starting in the early late 2000s in cinema with the Oscar winning film *Brokeback Mountain*.<sup>11</sup> In a world that was increasingly opening up to the gay community, states

<sup>8</sup> Philip Durham, “The Negro Cowboy,” *American Quarterly* 7, no. 3 (1955): 291–301. <https://doi.org/10.2307/2710621>.

<sup>9</sup> Roger D. Hardaway, “African American Cowboys on the Western Frontier,” *Negro History Bulletin* 64, no. 1/4 (2001): 27–32. <http://www.jstor.org/stable/24766998>.

<sup>10</sup> “Quentin Tarantino, ‘unchained’ and Unruly,” NPR, January 2, 2013, <https://www.npr.org/2013/01/02/168200139/quentin-tarantino-unchained-and-unruly#:~:text=Fresh%20Air%20Interview%20%2D%20Quentin%20Tarantino%20on%20'Django%20Unchained'%20With,thousand%20times%20worse.%20...>

<sup>11</sup> “Brokeback Mountain,” IMDb, accessed May 9, 2025, <https://www.imdb.com/title/tt0388795/>.

were slowly legalizing gay marriage and repealing old anti-sodomy laws, cinema was helping to lead the way in the public mind pushing for equality.<sup>12</sup> In terms of their impact, there are few figures in history more iconic than cowboys, using him as a vessel to communicate the issues that the gay community faced in society helped to reshape the conversations of the time.

Both *Brokeback Mountain* (2005) and *The Power of the Dog*, which was released in 2021 and also won an Oscar, also focus on a portion of the Cowboy identity that spoke in a unique way to the gay community.<sup>13</sup> In both movies, the main characters, the cowboys who are dealing with confronting their sexuality, push down their feelings while either engaging in straight relationships, or in physically and sexually abusive homosexual relationships. This specifically speaks to a trope in the gay community that so called manly men couldn't be gay. Instead, men had to conceal their homoerotic feelings by burying them deep inside of themselves, never to emerge. The cowboy is simply the manliest of the iconic American figures that people can associate with, and the push by the gay community to utilize it in media shows a conscious effort to reframe that masculinity.

Neither of these groups suddenly emerged onto the scene in the 21<sup>st</sup> century when their respective movies were released. These communities both had a deeply ingrained history in the entertainment industry that primed them to not only embrace the reconstruction of the cowboy as an icon of their communities, but also helped to set them up for success. For the Black community, this primarily emerged in the 1970s and '80s in the Blaxploitation genre of film. Movies like *Shaft* in 1970 helped to popularize this trend that focuses on using primarily Black actors to portray stories that resonated with Black audiences. The Black community saw these

<sup>12</sup> "The Journey to Marriage Equality in the United States," The Human Rights Campaign, accessed May 9, 2025, <https://www.hrc.org/our-work/stories/the-journey-to-marriage-equality-in-the-united-states>.

<sup>13</sup> "The Power of the Dog," IMDb, accessed May 9, 2025, [https://m.imdb.com/title/tt10293406/?ref\\_=sr\\_t\\_3](https://m.imdb.com/title/tt10293406/?ref_=sr_t_3).

films as either exploitative efforts to show Black neighborhoods as crime-ridden, or as empowering strong Black lead characters at a time when leading roles were still denied to Black actors. This era of film are the shoulders on which the 21<sup>st</sup> century Black cowboy stands today.

The gay community did not have the same film history as the Black community did. Their iconic figures were outside of Hollywood, at least those who were out publicly. It was musicians that took up the mantle of preparing the world for the new movement of homosexuals that would rise up and claim their rights in the 21<sup>st</sup> century. Major artists like Freddy Mercury were openly homosexual during a time when most people held deeply bigoted beliefs, and the popularity of the band Queen was immense despite all of that. This can be seen in no sharper detail than the Live Aid concert for the famine in Ethiopia in 1985 when 1.9 billion people tuned in to hear Mercury sing.<sup>14</sup>

What helped to tie the cowboy icon into the gay community was the image of Randy Jones, singer for the Village People, who dressed up as a flamboyant, denim-clad cowboy while on tour with the band. Known for being open about their sexualities and for creating music that spoke to gay culture, the Village People have produced some of the most iconic music that is played today, the staple “YMCA” being the most well-known. This brand of “out” gay culture was a product of its revolutionary times, a stepping stone that later movie productions were able to use to craft their narratives. Marching along in their footsteps came award winning movies like *Milk*, the biography of gay activist and politician Harvey Milk, and *Call Me by Your Name*, the coming of age story of a young man dealing with his conflicting feelings. The Gay icons of the 1970s and 1980s helped to create the very environment where movies with gay cowboys could be greenlit by movie executives and welcomed by crowds of moviegoers.

<sup>14</sup> Holly Thomas, “33 Years Later, Queen’s Live Aid Performance Is Still Pure Magic,” CNN, accessed May 9, 2025, <https://www.cnn.com/interactive/2018/11/opinions/queen-live-aid-cnnphotos/>.

the 1970s and 1980s helped to create the very environment where movies with gay cowboys could be greenlit by movie executives and welcomed by crowds of moviegoers.

Notably absent from the stories here are the inclusion of women in a 21<sup>st</sup> century rendition of the cowboy, or in this case the cowgirl. Although there are movies such as *Annie Oakley* (1935) and *Calamity Jane* (1953), there has not been a major example of a cowgirl focused major movie since.<sup>15</sup> Instead women are still relegated to their traditional roles as a foil to their male counterparts, the actresses are either a damsel to be saved or a cowgirl that can hang with the boys by being masculine herself. This is exceptionally prevalent in the 21<sup>st</sup> century show *Yellowstone* where the characters of Teeter and Beth both are rough, willing to fight, and can drink with the boys. Instead of creating a space where female characters can lay claim to an interpretation of the heroic icon of the cowboy that is uniquely theirs, they continue to be the object of their affections and the standard to which they must judge themselves. A good cowgirl is therefore not an Annie Oakley or a Calamity Jane, women who made their West uniquely theirs, but a hollow storytelling device that is used in the industry to prop up the masculine figure of the cowboy. She does not step out into the picture as a unique character but is a literary device that mirrors the cowboys around her. While Beth and Teeter are fun characters that do show that being feminine is not the only thing a woman can do, their portrayals in the show leave much to be desired.

This continuation of the status quo for women is perhaps the most striking of the examples when it comes to modern film and television approach to the cowboy iconography. The recent trend of opening up the heroic qualities and the complex nature of the cowboy to a more

<sup>15</sup> “Annie Oakley,” IMDb, accessed May 9, 2025, <https://www.imdb.com/title/tt0026073/>. “Calamity Jane,” IMDb, accessed May 9, 2025, <https://www.imdb.com/title/tt0045591/>.

diverse population just could not bridge the gap between an idealized masculinity and the feminine. It is in this context that we see the burgeoning conservative backlash against diverse cowboy figures that has begun to take shape in the 2020s. The television shows *Yellowstone* and *Landman* both have taken the traditional Western aesthetic and reapplied it to the white man. In the case of both television shows this has brought back a facet heretofore unmentioned in the iconography of the Cowboy, the gunfight.

When one meets with a modern ranch hand, a real living example of a cowboy, they can be struck by the difficult job this individual has to do. But almost never does that job involve gunfights and longstanding feuds with neighboring groups, cartels, and developers. Within the plots of both *Yellowstone* and *Landman* the characters get involved in the old tradition of the gunfight that is meaningfully different from *Django* or *Brokeback Mountain*. While *Django* is a bounty hunter who is fighting slavers and the lovers in *Brokeback* don't engage in these running gun battles, both television shows that harken back to the bygone era of white cowboy films have these as central plot points. Whether it is fighting the cartels or killing a biker gang for coming onto the ranch, these modern reimagining's of the old white cowboy center violence as a key part of their legend. Gone are the lighthearted, but scantily clad, cowboy of the Village People, or the swagger filled styles of Tarantino's Black lead actors. Instead, as scholars have begun to point out, the modern white western is beginning to look more like *Sons of Anarchy*, like violent biker gangs.<sup>16</sup>

Although for movie viewers the modern cowboy might seem to be an increasingly different character than they are used to, increasingly racially diverse, non-heteronormative, and

<sup>16</sup> G. L. Castleberry, (2014), "Revising the Western: Connecting Genre Rituals and American Western Revisionism in TV's 2019 *Sons of Anarchy*" in *Cultural Studies Critical Methodologies* 14, 269-278. <https://doi.org/10.1177/1532708614527561>.

sometimes female, the same ideals that inspired the character remain. Whether it is Black cowboys who are not only saving a damsel in distress, but are actively pushing against their enslavement, or cowboys who are struggling with their sexuality, the independence and steadfastness of the cowboy shines through. Despite the failings of the industry to bring stories of prominent women to the forefront, women have begun to make their way back into the story of the cowboy, a slow rediscovery of a hidden past. The golden era of the cowboy in films played to an audience that wanted to become John Wayne. Now that the audience is increasingly diverse, the cowboy as an iconic figure of American popular culture has to change to appeal to that audience. Whether the cowboy survives and thrives as an icon a hundred years from now will hinge on how he continues to adapt, and on who he adapts to become.

# Revisiting The Nueces Massacre

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## Abstract

*A monument sits in the small Texas Hill Country town of Comfort. While it is nestled out of the way, just off the main street of the town, it tells quite a tragic and heroic tale. The Treue der Union monument, inscribed in German and made of Texas limestone, preserves the little-known memory of a group of immigrants who were slain while standing up to insurmountable odds to defy an authority they disagreed with. This paper examines the events of the Nueces Massacre, the people who were involved, the monument made in tribute to it, and places the Nueces Massacre into the broader context of the Civil War in Texas.*



On August 10, 1862, on the outskirts of what was then Comancheria, near the Texas-Mexico Border, a military engagement took place between Texans overlooking the Nueces River. This conflict, far away from the front lines of the American Civil War, would go on to become one of the most controversial military engagements in the state's history. There, a group of Confederate troops alongside Texas state forces attacked a small group of German Texans, making their way toward Mexico. The resulting carnage left a stain on the history of the Texas Hill Country. Once seen as traitors to the Confederacy and to the state of Texas, it has become necessary to reevaluate the events that occurred at the Nueces that day and to correctly identify that what happened was a massacre and that the men who died that day were not traitors. Instead, they were heroes who exemplified all of the qualities that Texans choose to glorify.

## **The Background**

The Texas of the Civil War was very different from the Texas of today. Colonization of the State mainly focused on the eastern half, leaving the flat, open, and arid Plains to the west to the native peoples. The region was sparsely populated, except for the Comanche. Western Texas served as the last bastion of the Plains indigenous groups in the South. The Texas Hill Country, a region characterized by its quasi-mountainous and hilly terrain, and the Balcones Escarpment, a raised plateau, served as a border between Anglo-East Texas and Comanche-controlled Western Texas. In this borderland, settlers from what would eventually become Germany settled. German settlement along the Balcones Escarpment started in 1847, though this was in a much smaller number than would arrive afterwards. These early settlers would face conflict with the Comanches, though at times would attempt to make peace where possible.<sup>1</sup> The Germans

<sup>1</sup> Otto W. Tetzlaff, "The Fisher-Miller Land Grant and the Meusebach-Comanche Treaty." Texas State Historical Association. Accessed June 1, 2025. <https://www.tshaonline.org/handbook/entries/meusebach-comanche-treaty>.

arriving in Texas in 1848 were different from those who had arrived before. These Germans were refugees. Many of them were either the perpetrators of the 1848 revolutions in Central Europe or the descendants of those who had participated in them. Texas – and, by extension, the rest of the United States - served as a safe haven for these families to move to, where their ideas about liberty and freedom were celebrated rather than oppressed, as opposed to what was happening in the aftermath of the failed revolutions in Europe.<sup>2</sup> The Germans who migrated to Texas, numbering approximately 20,000 in total, founded these towns on the edge of the Hill Country.<sup>3</sup> The isolated towns served as a buffer between Anglo and Comanche territories. The isolated settlements allowed the German language to flourish and, most importantly, preserve their political beliefs.<sup>4</sup>

The Germans had different philosophical beliefs than the Anglo settlers to the east. They were veterans of the democratic revolutions in Europe. Many of them were thinkers, writers, highly educated, or had a valuable trade. Most importantly for the tensions that would arise, most of the Germans in the area were *Freidenkers*. The *Freidenkers*, German for Freethinkers, were Germans who advocated for democracy, religious tolerance, and universal rights. They staunchly believed in equal rights for all, freedom of speech, and, most importantly, for the issue at hand, they rejected secession from the Union and were staunch abolitionists.<sup>5</sup> Other Germans who were deeply religious and were also abolitionists settled farther north in Fredericksburg.<sup>6</sup>

<sup>2</sup> Stanley S. McGowen, “Battle or Massacre?: The Incident on the Nueces, August 10, 1862”, *The Southwestern Historical Quarterly* vol.104, no.1 (2000): 66, <http://www.jstor.org/stable/30241669>.

<sup>3</sup> Terry G. Jordan, “The German Influence in Texas: History and Cultural Impact.” Texas State Historical Association. Accessed June 2, 2025. <https://www.tshaonline.org/handbook/entries/germans>.

<sup>4</sup> Walter L. Buenger, “Secession and the Texas German Community: Editor Lindheimer vs. Editor Flake.” *The Southwestern Historical Quarterly* 82, no. 4 (1979): 380. <http://www.jstor.org/stable/30236864>.

<sup>5</sup> Glen E. Lich, “Understanding Freethinkers in 19th Century Germany and Texas.” Texas State Historical Association. Accessed May 24, 2025. <https://www.tshaonline.org/handbook/entries/freethinkers>.

<sup>6</sup> McGowen, “Battle or Massacre?”, 66.

The Germans who migrated to the United States and Texas after 1848 were primarily concerned with preserving the Union.<sup>7</sup>

When the referendum on succession happened in Texas, the Germans in the Hill Country voted overwhelmingly to stay part of the Union.<sup>8</sup> In contrast, the communities with Anglo majorities further to the east and in the coastal plains voted to secede.<sup>9</sup> The Hill Country Germans were morally against the institution of slavery. They wanted, above all else, to remain loyal to the Union, which they saw as preserving the rights that they fled Europe to gain.<sup>10</sup> When the session vote ended with Texas leaving the Union, the path toward conflict had been paved.

## **The Massacre**

When the vote for secession passed the Texas legislature and won the popular vote, the men in the Hill Country began to organize themselves in anti-Confederate militias. The efforts to create a force capable of defending the region against feared Confederate incursion were coordinated by the Union League. The Union League was a society of thinkers who strived to stay loyal to the Union above all else by encouraging anti-slavery and pro-democracy forces in the region. The league had been formed in opposition to the Knights of the Golden Circle, a secret society formed in 1852 to encourage the expansion of slavery into countries to the south of the United States.<sup>11</sup> Initially, the two societies tolerated each other, but by 1861, the issue of secession had polarized the two so profoundly that they both began calling for hostilities. With

<sup>7</sup> Rodman L. Underwood, *Death on the Nueces: German Texans, Treue Der Union*. (Austin: Eakin Press, 2002), 16.

<sup>8</sup> Ralph A. Wooster, "The Impact of the Civil War on Texas: Social, Economic, and Political Changes." Texas State Historical Association. Accessed June 23, 2025. <https://www.tshaonline.org/handbook/entries/civil-war>

<sup>9</sup> Walter D. Kamphoefner, "New Perspectives on Texas Germans and the Confederacy", *The Southwestern Historical Quarterly* 102, no 4 (1999): 442-444. <https://www.jstor.org/stable/30242540>.

<sup>10</sup> Vivian Elizabeth Smyrl, "Kendall County, Texas: History, Geography, and Economy." Texas State Historical Association. Accessed on June 8, 2025. <https://www.tshaonline.org/handbook/entries/kendall-county>.

<sup>11</sup> Underwood, *Death on the Nueces*, 22.

secessionists in complete control of the new Confederate government, the Knights of the Golden Circle exerted significant influence over military policy. Weary of the Union League, the issue was raised regarding potential rebellion.<sup>12</sup> Indeed, by 1862, the surrounding communities had assembled a force of three companies, comprising approximately 500 men. Before the war, many of these men had served in small units to fight off raids from the Comanches. They were well-armed and supplied, and they were ready to resist any perceived Confederate aggression.<sup>13</sup> That same year, the Confederacy passed the Enrollment Act, requiring all white men between 18-35 to join the Confederate army.<sup>14</sup> The German Texans, who wanted no part in the war, began to resist efforts by the Texas government to conscript them into the Confederate military, particularly by joining or supporting the previously mentioned Union League.<sup>15</sup> While morally against the war, the German Texans were by no means peaceful. As previously mentioned, they had already created small militia groups, with the job before the war being to defend the isolated settlements from Comanche raids.<sup>16</sup> These militia companies, while small, were battle-tested and quite capable.

A few months before the massacre, local newspapers in San Antonio began to publish anti-German rhetoric, urging them to leave the country and calling them traitors to the Confederacy.<sup>17</sup> These initial publications became increasingly politically charged, with each side publishing harsher rhetoric about the other. At the time, San Antonio was a hub for German, Anglo, and Hispanic Texans in the southern part of the state. In 1861, papers in San Antonio

<sup>12</sup> Underwood, *Death on the Nueces*, 22-24.

<sup>13</sup> McGowen, "Battle or Massacre?", 67-68.

<sup>14</sup> Underwood, *Death on the Nueces*, 23-24.

<sup>15</sup> Wooster, "Impact of the Civil War on Texas."

<sup>16</sup> McGowen, "Battle or Massacre?", 68.

<sup>17</sup> Underwood, *Death on the Nueces*, 24-26.

would run headlines about how German abolitionists were running and winning city council seats in St. Louis. This caused alarm to spread about Germans potentially gaining political power in San Antonio.<sup>18</sup> San Antonio papers would call on the Germans in the Hill Country to support the Confederate cause and take up arms, arguing that not to do so would be traitorous and anti- Texan.<sup>19</sup> Things would finally spill over when, in the Spring of 1862, Germans representing the settlements of the Hill Country that were part of the Union League officially declared their intent to form and lead militias. Although they had already established and were operating, this was the official declaration. When the declaration became known, the population of San Antonio began to feel alarmed, mainly because the meeting had taken place in their metaphorical backyard.<sup>20</sup>

Tensions truly began to boil over once the Confederate government realized that the Northern states had established contact with the Unionists. Confederate spies had learned that the Lincoln administration was considering using the militias as a means of attacking Austin or San Antonio. At the same time, the Union fleet made a naval demonstration off the Texas coast near Galveston.<sup>21</sup> The Confederate government also received word of a proposed plan for the militia to free captured federal troops that were being held in a nearby detention facility. They then hoped for the group to join and make an advance on Austin or San Antonio.<sup>22</sup> It is not a far-fetched idea to say that this plan, alongside the proposal from the Lincoln administration, was connected. Indeed, the assumption by the Confederate government that something was going to happen became even more real with the failed Confederate expedition into New Mexico, federal capture of New Orleans on May 1, the capture of Baton Rouge on May 15, and a naval

<sup>18</sup> J. Y. Dashiell & A. E. McLeod, "Municipal Election in St. Louis", *The Daily Ledger and Texan*, Ma, 8, 1861, 2.

<sup>19</sup> J. Y. Dashiell & A. E. McLeod, "Distinctions among the People", *The Daily Ledger and Texan*, June 8, 1861, 2.

<sup>20</sup> Underwood, *Death on the Nueces*, 26.

<sup>21</sup> Underwood, *Death on the Nueces*, 26.

<sup>22</sup> McGowen, "Battle or Massacre?", 72-73.

demonstration off the coast of Galveston also on May 15, 1862.<sup>23</sup> The Texas government could see itself being boxed in. Feeling that a Union advance into Texas was inevitable, the Confederate government ordered a military expedition to end the threat of rebellion in the Hill Country for good.

Captain James M. Duff was dispatched from San Antonio with a combined force of state militia and Confederate cavalry to head northwest and assess the situation, to gain control.<sup>24</sup> Importantly, Duff, like many officers during and after the Civil War, had a public image that did not portray him as who he truly was. Duff was an immigrant from Scotland. He was a member of the Knights of the Golden Circle and had served in the Texas militia for an extended period. He had gained the trust of the people he had served under, and in May of 1862, he had taken a command as a captain in the Confederate army in Texas. A month later, in mid-June, he had ridden north to Fredericksburg and arrested 3 German men who had violated the conscription act.<sup>25</sup> In the aftermath of this, Duff was nicknamed “The Butcher of Fredericksburg”. When the news reached the local German towns that Duff was marching north, a widespread panic began to take shape. Things grew even worse when Duff declared martial law over all of Gillespie County, where Fredericksburg was. He then arrested citizens of Gillespie County whom he accused of pro-union activities and executed them, thereby officially earning his nickname.<sup>26</sup> It should be noted that while the intelligence of guerrilla force mobilization and secret plans to work with the Union were accurate, it was also true that the German militias were not actively pursuing them at the time of Duff’s departure. Furthermore, it was the arrival of Duff’s men and

<sup>23</sup> Underwood, *Death on the Nueces*, 26.

<sup>24</sup> McGowen, “Battle or Massacre?”, 73-75.

<sup>25</sup> McGowen, “Battle or Massacre?”, 74.

<sup>26</sup> McGowen, “Battle or Massacre?”, 75 – 76.

his actions that caused the impending upheaval that would lead to the massacre – they were the match that was thrown into a powder keg.

Having had enough and fearing for his community's safety, Fritz Tegener, a county treasurer from the town of Comfort, Texas, just south of Fredericksburg, gathered a group of eighty men. Of this group, 65, including Tegener, had decided to leave Texas. They hatched a plan to flee to Mexico and board a ship that would take them to the port of New Orleans, now occupied by the Union, where they would enlist in the Union Army and fight against the Confederates.<sup>27</sup> The men had assembled on Turtle Creek, just west of Fredericksburg, and on August 2, began their march westward to the town of Del Rio, which sat on the Rio Grande, directly across from the Mexican border. As they started their march, they were eventually joined by four more men, Anglo-Texans who sympathized with the Union. The party, now sitting at 69 men, slowly made its way to the border.<sup>28</sup> They reached the small town of Uvalde, about halfway between Del Rio and Fredericksburg.<sup>29</sup> They stopped to replenish their food supplies and, most importantly for the events that followed, their water. At the time, there was a water drought in the Hill Country, and so the party moved slowly and methodically, following what streams and rivers they could find. This led them to the Nueces River, where they made camp on August 10, 1862.<sup>30</sup> What they did not know was that the entire time they were moving west, they were being pursued.

When Duff had reached the area around Gillespie County, he declared that all the people in the surrounding region should proclaim their loyalty to the Confederacy or face punishment.

<sup>27</sup> Richard Parker & Emily Boyd, "Massacre on the Nueces", *The New York Times*, August 11, 2012. <https://archive.nytimes.com/opinionator.blogs.nytimes.com/2012/08/11/massacre-on-the-nueces/>.

<sup>28</sup> Underwood, *Death on the Nueces*, 28.

<sup>29</sup> Parker & Boyd, "Massacre on the Nueces".

<sup>30</sup> Underwood, *Death on the Nueces*, 38.

The Germans did quickly proclaim their allegiance to the country, and things seemed to have calmed down. The Germans, faced with the Confederacy's military power, had backed down.<sup>31</sup> Duff also chose to put the houses of suspected union sympathizers under surveillance. One of these houses was none other than Fritz Tegener's. What Duff did not know quite yet was that Tegener had already left for the Turtle Creek rally point.<sup>32</sup> A few days after arriving in Gillespie County, Duff received a report on Tegener's plan. Not quite being sure of its authenticity, Duff dispatched 96 cavalry under the command of Lieutenant Colin McRae with orders to head west and scout ahead in case there was a militia present. McRae had orders to scout the enemy and arrest them, if possible, but was authorized to use force if necessary. On August 3, McRae left the camp with his men and began to pursue Tegener.<sup>33</sup> Over the next week, McRae began to find the remnants of camps, and by the evening of August 9, his advance guard had located Tegener and his men, who were camped on the banks of the Nueces River.<sup>34</sup>

That evening, McRae drew up his battle plan, splitting his forces into two, aiming to attack the encampment from two sides. McRae would shoot his pistol, and that would signal the start of the attack.<sup>35</sup> Later that night, though, German sentries stumbled into the Confederates, and they opened fire without McRae's signal. The surprise attack threw everything into chaos. Some of the Germans began to flee to more defensible terrain, while others, including Tegener, chose to stay and fight at their camp. Including casualties and those who fled, the main German force had dwindled to about 30 unwounded men, who were now facing off against McRae's 90. With a final assault, McRae drove out the remaining Germans, leaving only the wounded in the

<sup>31</sup> Underwood, *Death on the Nueces*, 35.

<sup>32</sup> Underwood, *Death on the Nueces*, 39.

<sup>33</sup> Underwood, *Death on the Nueces*, 43.

<sup>34</sup> Underwood, *Death on the Nueces*, 43-44.

<sup>35</sup> McGowen, "Battle or Massacre?", p.77-78.



camp. By this point, 19 men lay dead in the camp, with another 11 injured. McRae's men then took the wounded men to a cluster of nearby trees and shot them all in the head. While McRae took his wounded and dead to be treated and buried, he left the corpses of the dead Germans out in the open to rot. McRae's participation in the massacre of the wounded prisoners is up for debate. McRae was wounded in the fight and, therefore, was likely not directly controlling these men in the aftermath. He also did not report the widespread murder of prisoners in his after-action report. What he did say, however, was that it was a stunning victory for his men.<sup>36</sup> Yet, there is evidence that it was junior Lt. Edwin Lilly who presided over the killings. Interestingly enough, Lilly was not the next in command; this fell to two other men in McRae's party, the first lieutenants Homsley and Bigham.<sup>37</sup> We also know, based on military tradition, that the more grisly tasks were usually assigned to junior officers.<sup>38</sup> So this means that McRae was so incapacitated that he could not tend to the needs of his troops, leading to either Homsley or Bigham authorizing the mass killings of wounded men, that McRae authorized the killings and just forgot about it in the report, or, finally, that McRae knew that it would look bad on his legacy had it been known that he authorized the killings.

To add even more confusion to what exactly happened that day on the Nueces, there are disputes as to how many precisely were executed by McRae's men. The general agreed-upon number is 9, yet there is also evidence to show that these 9 men were confused with the 9 survivors of the skirmish who were later caught and executed by Confederate authorities.<sup>39</sup> Later, in 1865, when the bodies of the men who were slain were recovered, there were skeletons found

<sup>36</sup> McGowen, "Battle or Massacre?", p.79-83.

<sup>37</sup> McGowen, "Battle or Massacre?", 82.

<sup>38</sup> Underwood, *Death on the Nueces*, 78.

<sup>39</sup> Underwood, *Death on the Nueces*, 79.

away from the main site that had confirmed bullet wounds in their skulls. While this only numbered at 3, this means there is at least evidence to suggest that some people were executed by being shot in the skull.<sup>40</sup> Regardless, the agreed-upon final death count sat at 28. Later, a group of the survivors will once again attempt to cross the Rio Grande to enter Mexico. The 15 men will fight the Confederates sent after them and will have eight of their number killed. While this event happened 2 months after the Nueces Massacre, the losses are grouped into the remembrance of the event, given that these men were survivors of the initial engagement.<sup>41</sup> Following the conclusion of these hostilities, Duff stayed in the region for a few more months, pacifying the area. By spring 1863, the German unionists had grown more passive and no longer looked to fight against the Confederacy outright. Duff had achieved his goal through brutal tactics.<sup>42</sup>

## **The Monument and Memory**

As previously mentioned, it wasn't until after the war in 1865 that a group of Germans from Comfort arrived at the site of the massacre to gather the now decomposed bodies of those who were killed on that day. They brought whatever was left of the men back home and commissioned a monument to remember them, which was completed in August of 1866.<sup>43</sup> The monument, titled *Treue der Union*, meaning “loyalty to the union” in German, stands in a city park in Comfort, Texas, and is made of 35,700 pounds of Hill Country limestone.<sup>44</sup> The obelisk

<sup>40</sup> Underwood, *Death on the Nueces*, 78.

<sup>41</sup> Underwood, *Death on the Nueces*, 89-91.

<sup>42</sup> Robert W. Shook, “The Battle of the Nueces, August 10, 1862.” *The Southwestern Historical Quarterly* 66, no. 1 (1962): 41-42. <https://www.jstor.org/stable/30236222>.

<sup>43</sup> Underwood, *Death on the Nueces*, 77-78.

<sup>44</sup> Richard E. Miller, “Treue der Union Monument Historical Marker.” Historical Marker. Accessed June 17, 2025. <https://www.hmdb.org/m.asp?m=34985>

in the center stands at 20 feet tall. Adjoining it stands a lone 36-star American flag, meant to symbolize the 36 states that were part of the Union when it was finished.<sup>45</sup> The flag permanently flies at half-staff. The whole monument acts as a mass grave for those who died, with the names of the men written in German. The Treue der Union monument was one of the first Civil War monuments to be erected, having been completed slightly more than a year after the conflict's conclusion.<sup>46</sup> But why build the monument in Comfort as opposed to Kerrville, Fredericksburg, or Boerne, the three largest towns in the region? As opposed to the latter three settlements, Comfort had nearly its entire youth population wiped out by the Nueces massacre. For this town, the events that took place at the Nueces were cataclysmic and deeply traumatizing.<sup>47</sup>

Perhaps one could argue that the Germans are to blame just as much as the Confederates for the engagement. After all, the Germans were well armed – they had prepared for a fight. The Confederates, too, had sound reasoning for going up into the Hill Country. Their intelligence apparatus had pointed towards a possible rebellion and collusion between the Lincoln administration and the borderland settlements, and there is evidence to support the notion that contact existed between the two. Yet, when Duff arrived and demanded the swearing of allegiance, the overwhelming majority of the inhabitants did. In all actuality, it appears that the military action taken by the Germans was more of a response to Confederate hostility rather than loyalty to the Union. The companies of militia men were created as a way of defending towns from Confederate incursions, and they were formed when the Confederate press in San Antonio was actively promoting anti-German propaganda. The irony of the entire situation is that the German Texans, who wanted to stay loyal to the country that they swore an oath to and loved,

<sup>45</sup> Frank Wilson Kiel, "Treue der Union: Myths, Misrepresentations and Misinterpretations", *The Southwestern Historical Quarterly* 115, no 3 (2012): 290-291. <https://www.jstor.org/stable/41617001>.

<sup>46</sup> Underwood, *Death on the Nueces*, 146-147.

<sup>47</sup> Underwood, *Death on the Nueces*, 82-83.

were called traitors by the very people who betrayed their country. Had the Confederates never chosen to engage in vilifying the Hill Country Germans, the actions taken by the latter would not have happened.

American history and Texas history are both fields of study where historians are tasked with distinguishing between myth and fact. Oftentimes, the two can become so intertwined that they can become inseparable. It can furthermore become even harder to decipher what happened at a particular moment in time when considering that two separate groups of people can experience the same event and draw two different conclusions from it. The Nueces Massacre is an excellent example of this dynamic in action, particularly because specific details remain unclear. Contemporary historians know that there was a military engagement between Confederate forces under the command of Lieutenant Colin McRae and Union loyalists under the command of Fritz Tegener. We know that after the events that transpired, a group of soldiers were executed, but the exact number is unknown. This later point has caused great debate in the historical community as to whether the event should be reclassified as a massacre rather than a battle. To the people of Comfort and the Hill Country, the events that transpired that day are remembered as a massacre. Other events during and after the Civil War, such as the Sand Creek massacre, have had their names and remembrances altered due to the reevaluation of their historical context. Give all the evidence that is at hand and is available to us, by all accounts, what happened at the Nueces was a massacre.

What distinguishes a battle from a massacre? A battle refers to any form of organized military engagement between opposing forces. A massacre, by contrast, involves the deliberate and indiscriminate killing of individuals, often those who are unarmed, wounded, or otherwise incapable of resistance. While these events can occur independently, they may also overlap under

certain conditions. One might argue that when a battle becomes overwhelmingly one-sided, such that one force entirely overruns the other, it can culminate in what may be termed a "battlefield massacre." The events at the Nueces serve as a clear example: disarmed and wounded prisoners of war were systematically executed. By any standard definition, this constitutes a massacre.

These questions point towards the much deeper issue at hand – how can we quantify suffering? What level of suffering qualifies an event to be moved from warfare to a massacre? Perhaps the most tragic thing of all is the need to attempt to rationalize the horrors that people elect to do to one another. Grief and tragedy are not feelings that can easily be described, and yet it is events like the Nueces Massacre that force us to suspend our humanity and choose to attach a measurable quality to something that cannot be adequately measured. It is not the number of people killed that day that makes it tragic, although the death count on the German side was quite large. What matters is that there were wounded men needlessly killed. What matters is that a group of men were ambushed and gunned down for simply choosing to stand for what they believed in – the end of slavery. What matters is that a small town lost nearly the entire youth population. There were men, sons, and fathers who never returned home when they could have. In the case of what happened at the Nueces River, it has become important to reclassify the event from a battle to what it truly was – a massacre. A massacre of men, a massacre of morals, and a massacre of what it means to be human. A massacre whose scars are burned into the scorched Hill Country limestone.

Today, the men buried at the Treue der Union monument rest peacefully. The grounds are well-kept, and Comfort is a thriving small town. Their memory and what they stood for is still contested. On the one hand, the story of these men was often vilified through the lens of the Lost Cause myth. For a long time after the war, the men who died at the Nueces were seen as

to their state and the antebellum South. They were seen as backstabbers and, oftentimes, viewed as not truly Texan. In the aftermath of the war, the South continued to portray itself as a chivalric and honorable society. A society that was forced with its back against the wall to fight a conflict for its very survival as a culture. A society that found itself doomed to lose an unwinnable war, and yet they fought it anyway, bound together by their shared identities as Southerners. They fought and died honorably for Dixie, and in their shared sacrifice, the idealized memory of the South would live on. In this narrative, the Nueces was a battle between the honorable men of the Confederacy, fighting and thoroughly defeating the dishonorable and traitorous German immigrants. They were disloyal to their new homeland and therefore deserved to face the consequences of their treachery. In this telling, one that has long been the prevailing narrative in the state, there is no mention of the Confederate propaganda meant to “other” the German immigrants in the Hill Country. There is no mention of the countless people who were forced to pledge their allegiance to the Confederacy under threat of execution. There is no mention of the mass execution of men, and later, the potential military cover-up. There is no mention of bodies left to rot and bones left to decay and become bleached by the West Texas sun. The reason for all of this being left out is that the Nueces massacre was not glamorous. It was not a resounding victory for the Confederacy. It was, in truth, an indictment of the Confederate cause. The Confederacy liked to portray itself as a defender of the rights of men in the face of tyranny. Yet, it condemned German immigrants to a massacre over their belief that it was immoral to hold other human beings in bondage. In no world is that standing up for the rights of men. Why is it that we should remember the Alamo and remember Goliad, and not the Nueces? Because the Nueces does not fit the standard mythological narrative of Texas history.

But were they traitors? A simple reframing of the argument can provide an answer to this question. The men who ventured into the West Texas countryside came to their homeland in search of a place to practice their beliefs. Their European governments had scored them for choosing to stand for liberty. They were consistently demonized with Confederate propaganda in the newspapers. They were called anti-Texan for voting against succession, and for wanting to see slavery abolished. They felt threatened by the government that was meant to support them and guarantee their safety, so they formed units to guard themselves against attack. Their government sent a military detachment to force them to pledge loyalty to their government, which they did not recognize. Many men then decided to flee west to join the fight against the Confederacy by pledging their service to the recognized government of the United States, the country they came to and called home. They chose to stand up for what they believed in rather than submit themselves to serving a power that they found morally repugnant. They were then massacred for their beliefs. The story of these men and the monument that they call their final resting place today stands as a poignant reminder about what it truly means to serve and die for one's country.

The men who were massacred that day at the Nueces were heroic: in the face of an overwhelming hostile government, they stood up for liberty, stayed loyal to their country, and, most of all, for the abolition of slavery, even if it meant they would sacrifice their lives. This is the view that cannot and should not be allowed to be forgotten. The men who rest at the Treue der Union monument demonstrated every trait that the Lone Star claims to symbolize. These men were the very best of their generation. They were neither traitors nor heroes, but Texans who lived and died, leaving behind a legacy of honor, loyalty, and an unwavering devotion to the causes of liberty and freedom.

**Review of *From Coveralls to Zoot Suits: The Lives of Mexican American Women on the World War II Home Front* by Elizabeth Escobedo**

By: Alexandra T. Medina

Department of History



**Escobedo, Elizabeth.** *From Coveralls to Zoot Suits: The Lives of Mexican American Women on the World War II Home Front*. Chapel Hill: University of North Carolina Press, 2013. xi + 229.

Monographs on World War II history are a concentrated market, but Elizabeth Escobedo's *From Coveralls to Zoot Suits: The Lives of Mexican American Women on the World War II Home Front* focuses on the vastly unrepresented perspective of Mexican American women. Using a synthesis of oral histories, family histories, federal and state records, and English and Spanish-language newspapers, Escobedo chronicles the experiences of Mexican American women living in the 1940s and 50s Los Angeles area. Escobedo argues that the World War II home front expanded opportunities for Mexican American women to defy traditional gender norms and navigate their own American and Mexican identities. *From Coveralls to Zoot Suits* uncovers the pivotal role Mexican American women undertook while unraveling important concepts in Mexican American studies, such as identity, cultural negotiation, and autonomy.

“Pachuca” culture is foundational to women’s defiance of traditional gender norms in *From Coveralls to Zoot Suits*. The pachuca, also known as the “female zoot suiter,” represented a figure that challenged traditional notions of Mexican feminine decorum and was distinct from mainstream American culture.<sup>1</sup> Escobedo uses anecdotal accounts from oral histories and newspapers to illustrate how Mexican American women were policed by Mexican families, the Los Angeles judicial system, and local media sources. On one hand, first generation and immigrant generations detested the female zoot suiter and likened it to the “La Malinche” archetype because pachucas were an embarrassment to their families and traitors to the Mexican

<sup>1</sup> Elizabeth Escobedo, *From Coveralls to Zoot Suits: The Lives of Mexican American Women on the World War II Home Front*, (Chapel Hill: University of North Carolina Press, 2013), 18.

people.<sup>2</sup> Comparatively, English-language newspapers fueled miscegenation fears by emphasizing the immoral promiscuity that pachuca's embodied. Court documents and juvenile records demonstrate how the label "pachuca" or "zoot suiter" was used to racialize young Mexican American women in incarceration, regardless of whether the women participated in pachuca culture.<sup>3</sup> Escobedo demonstrates how to pachuca culture became an outlet of liberation and autonomy by which Mexican American women used to construct new identities.

*From Coveralls to Zoot Suits* falls short in explicitly recognizing how pachuca subculture defied heteronormativity during the World War II era. Escobedo describes the pachuca figure as someone who "played with sexuality" by donning masculine clothing.<sup>4</sup> During the early twentieth century, most women exclusively dressed in a feminine and modest manner, but the zoot suit, conversely, reflected non-gender-conforming dispositions. Escobedo only focuses on how the pachuca figure was oversexualized, stigmatized in the media, and perpetuated panic of premarital relations and miscegenation.<sup>5</sup> Akin to racist sentiments that discouraged Mexican American women from fraternizing with men, cultural standards of femininity and procreative sex forbid women from exploring masculine identities and homosexual relations.

Nonheteronormative expressions and masculine roles that the pachuca subculture represented are crucial to the analysis of autonomy and identity that Mexican American women navigated during World War II.

Escobedo draws several eminent scholars in Mexican American studies, such as Vicki Ruiz and George Sanchez, by employing theoretical concepts such as "the constitutive other"

<sup>2</sup> Escobedo, *From Coveralls to Zoot Suits*, 29.

<sup>3</sup> Escobedo, *From Coveralls to Zoot Suits*, 25.

<sup>4</sup> Escobedo, *From Coveralls to Zoot Suits*, 9.

<sup>5</sup> Escobedo, *From Coveralls to Zoot Suits*, 30.

and “cultural coalescence”.<sup>6</sup> *Coveralls to Zoots* is a perfect example of how cultural coalescence, the process of immigrants and succeeding generations preserving, assimilating, rejecting, and constructing certain cultural forms, is integral to the documentation of Mexican American history. Escobedo indicates how daughters of immigrant parents negotiated their place in American and Mexican society by rejecting conventional American beauty standards, denouncing chaperonage as a “method of control”, and embracing work culture outside of the domestic sphere.<sup>7</sup> Chapter two, “Americanos Todos,” illustrates the paradox of state-sponsored Americanization campaigns that espoused a homogenous “Americans All” and the lack of citizenship and welfare eligibility that Mexican American women endured.<sup>8</sup> The complex intersectionality of Mexican heritage, American patriotism, womanhood, familial duty, and an “almost white” social status is important to understanding the different roles Mexican American women mediated in their private and public lives. These themes are critical to contemporary discourse about Mexican American representation in U.S. history and generational family dynamics.

*From Coveralls to Zoot Suits* is an exemplary addition to the field of women’s history, wartime history, and Mexican American studies. Complementary to the vibrant exhibit of historical research, oral histories, and storytelling, every chapter is decorated with photographs of Mexican American women “jitterbugging” at the dance hall, being detained by police, working on aircrafts, and socializing at organizational events.<sup>9</sup> Not only are the photos a wonderful visual aid, but each photograph also illustrates the different ways Mexican women on

<sup>6</sup> Escobedo, *From Coveralls to Zoot Suits*, 4.

<sup>7</sup> Escobedo, *From Coveralls to Zoot Suits*, 145.

<sup>8</sup> Escobedo, *From Coveralls to Zoot Suits*, 45-46.

<sup>9</sup> Escobedo, *From Coveralls to Zoot Suits*, 23-24, 27, 83, 119.

the home front created space for themselves in American society. Escobedo's analysis of Mexican American women's contributions and experiences in Los Angeles exemplifies the necessity of local history during World War II.

**Review of *Puerto Rico: A National History* by Jorell Meléndez-Badillo**

By: Michael Santos  
Department of History

**Meléndez-Badillo, Jorell.** *Puerto Rico: A National History*. Princeton, NJ: Princeton University Press, 2024.

Jorell Meléndez-Badillo's *Puerto Rico: A National History* presents a sweeping narrative that reframes Puerto Rico from a passive colonial subject to a dynamic, persistent nation forged through centuries of resistance. In contrast to the concise focus of his first book, *The Lettered Barriada*, this national history offers a broader temporal and thematic scope that spans from pre-Columbian Taíno societies to Spanish colonial rule, and from the origins of U.S. imperialism to the present day. Throughout the book, Meléndez-Badillo challenges dominant, oversimplified narratives by centering Puerto Rican agency, rebellion, and identity formation. Recognized for his extensive research and efforts, Meléndez-Badillo recently collaborated with Puerto Rican megastar Bad Bunny to help create the world's most streamed album of 2025, *Debí Tirar Más Fotos*.

Meléndez-Badillo's book argues that Puerto Rico has always been a nation on the move. In other words, the Puerto Rican community has been shaped by displacement and colonialism, yet it is defined by its refusal to be erased. This approach allows readers to understand the diaspora that exists across Puerto Rico and the mainland USA – where cultural exchanges between both have defined what it means to be Puerto Rican today. Meléndez-Badillo employed an interdisciplinary approach that includes archaeology, anthropology, and social history to reconstruct this national story. His writing challenges the myth of harmonious racial unity in Puerto Rico and the myth of its passive subjugation to colonial rule. The book highlights moments of rebellion, like the 1511 Taíno Rebellion, various enslaved revolts, the 1868 Lares Uprising, and the mid-twentieth-century nationalist movements, as emblematic of a deep-rooted, continuous push toward self-determination.

Meléndez-Badillo is careful to simultaneously acknowledge the impact of both intranational and interregional developments on Puerto Rico's history. He situates Puerto Rico's shared background of Spanish colonialism within a broader hemispheric context, and then zeroes in on its isolated developments. From a transnational standpoint, he centers the impacts of the Haitian and French revolutions, along with the ongoing independence movements across Latin America. Within this context, you see how Puerto Rico emerged as a space that was deeply entangled in regional debates over freedom, sovereignty, and racial order. During the nineteenth century, these points of contention were largely shaped by the fear of slave revolts and varying aspirations for autonomy. Intranationally, Meléndez-Badillo emphasizes the underacknowledged contributions of people like the privateer Miguel Enríquez and the ongoing struggles against racial, social, and economic inequalities. This balance allows readers to understand the unique social contexts of Puerto Rico and how the surrounding world shaped its trajectory. Altogether, the book underlines the agency of local actors in shaping their own histories.

One of the book's most compelling strengths is its strategic engagement with terminology and narrative framing. Meléndez-Badillo avoids the colonial language that often distorts Puerto Rican history. Instead, he employs terms that also reflects Indigenous and Afro-Caribbean perspectives and broadens the analytical lens through which Puerto Rico's past is understood. The book deftly dismantles the myth of "the Great Puerto Rican Family," a narrative that falsely promotes racial and social harmony. He does so by revealing the legal, economic, and cultural mechanisms of colonial rule that upheld a racially stratified society for centuries. His attention to the relationship between criollos (locally born Spaniards) and peninsulares (Spanish-born elites) also offers a nuanced view of power struggles in the Spanish colonial period. Meléndez-Badillo's research shows how allegiance from the criollos to the Spanish throne was contingent on the

benefits they received from colonial rule, and how they were simultaneously elevated above (and distanced from) Afro-descendant and Indigenous populations.<sup>1</sup> These identities were constructed through legislation and reinforced a hierarchy that excluded the majority from political and economic power. His work also highlights how similar hierarchies were repurposed under U.S. rule to maintain systems of racial and class-based domination.

Meléndez-Badillo is unflinching in his critique of the long-standing exploitation of Puerto Rico. He outlines how both Spain and the U.S. employed legislation to turn Puerto Rico into an export-based economy that served imperial interests. His writing illustrates how colonialism evolved but never disappeared; in fact, Puerto Rico's economic dependence and political subjugation is a pattern that has lasted for over five hundred years. However, as the author underlines, Puerto Rican resistance is a continuity that has persisted over the same half-millennium. He shows the various ways that local actors planned rebellions, preserved values and subverted the colonial rule through extralegal operations. His particular analysis of smuggling echoes Juan Ponce Vázquez's *Islanders and Empire*, for they both reinforce the theme of resistance through everyday economic activity.

While the scholarly rigor of the book is evident, Meléndez-Badillo takes the bold step of incorporating personal reflection—most notably in his discussion of Hurricane María (2017). Some historians might find the anecdote about his grandmother's experience overly subjective, but its inclusion ultimately serves to underscore the human cost of the U.S. government's neglect. His critique of the Trump administration's dismissive response to the disaster adds a powerful contemporary dimension to the historical narrative and shows the continuity of colonial abandonment from the 19th century into the 21st.<sup>2</sup> If there is any limitation to this ambitious

<sup>1</sup> Jorell Meléndez-Badillo, *Puerto Rico: A National History* (Princeton, NJ: Princeton University Press, 2024), 56.

<sup>2</sup> Meléndez-Badillo, *Puerto Rico*, 192.



work, it may be that its thematic range occasionally moves quickly across eras and actors, risking surface-level treatment of some topics. However, this breadth is arguably necessary for a book that seeks to serve as both a scholarly intervention and a foundational national history.

A final strength of *Puerto Rico: A National History* lies in its insistence that Puerto Rican identity is not monolithic. Meléndez-Badillo successfully recognizes the tensions within Puerto Rican society. This is between those who resist colonial rule and those who embrace it, between elites and the working class, and among various racial and ethnic communities. This recognition strengthens his broader claim that Puerto Rican nationhood is complex, contested, and continually evolving.

In sum, *Puerto Rico: A National History* is an invaluable contribution to Puerto Rican historiography and colonial studies. It bridges the past and present, dismantles simplistic narratives, and reclaims Puerto Rican history for its people. This book will be essential reading for scholars of Latin American and Caribbean history, educators, and anyone seeking to understand the island's enduring struggle for self-determination. Meléndez-Badillo succeeds in his goal: to show that Puerto Rico has always been a nation—not because of political independence, but because of its persistent resistance, memory, and identity.

## AUTHOR BIOS

### Rebecca Bricker



Rebecca Bricker earned a B.A. in History from Auburn University at Montgomery, Alabama, and is pursuing an M.A. in Art History with a Public History certification at the University of Texas at San Antonio, Texas. Her interest is religious art and how it reflects and influences culture and memory throughout history.

### Alexis Cairy



Alexis Cairy, San Antonio-based performer, teacher, writer, and researcher, holds a B.M. from the University of Colorado Boulder and a Master of Music in Vocal Pedagogy and Voice Performance from the University of Texas at San Antonio. Performance and competition credits include Minnesota Opera, Eklund Opera, UTSA Lyric Theatre, The Metropolitan Opera Laffont Competition, The Schubert Club of St. Paul Bruce P. Anderson Competition . Her research explores voice science, performance practice, and interdisciplinary approaches to vocal education across continents.

### Kristen Clay



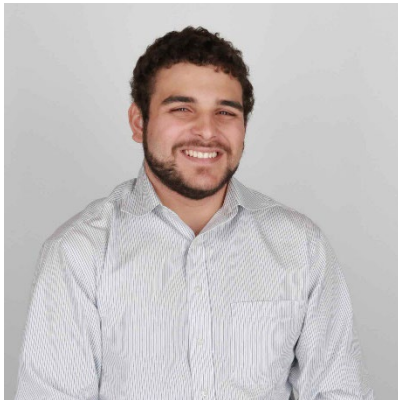
Kristen Clay graduated from Tarleton State University in 2020 with her BA in History. Currently, she is pursuing her MA in History at the University of Texas San Antonio. She credits several teachers from middle through high school with nurturing her love of history. Her research has been primarily focused on the late Medieval-Early Modern era of European history, as well as the history of the LGBT+ community here in the United States.

### **Julian Hernandez**



Julian Hernandez is a U.S. Army veteran, journalist, and Public Affairs Specialist with the U.S. Air Force. He is currently pursuing an M.A. in History at the University of Texas at San Antonio, where his research focuses on 19th- and 20th-century U.S. military history, insurgency and counterinsurgency, and the intersections of national identity, memory, and armed conflict.

### **Elias Hudson**



Elias Hudson holds a Master of Arts in Political Science from UTSA, awarded in 2024. They currently serve as a lecturer in the Department of Political Science and Geography. Their diverse pool of research interests includes globalization, feminist theory and electoral integrity.

### **Sandra Huffman**



Sandra Huffman is a graduate student pursuing a master's degree in history at UTSA. Their research has covered a broad range of subjects but focuses on early Medieval Europe and its social and cultural history. Sandra is drawn to exploring the everyday lived experiences of the people in the past, as well as the role of fiction, memory, and religious practice in shaping the interplay between textual rhetoric and lived reality.

### **Taylor Malcolm**



Taylor Malcolm graduated in the spring of 2025 with her Master of Music in Vocal Performance and Pedagogy from the University of Texas at San Antonio. While earning her degree, Mrs. Malcolm had the opportunity to perform Francis Poulenc's one-woman opera, *La voix humaine*, with the UTSA Lyric Theatre. She is grateful for the opportunities to research, write about, and perform this incredible work. It is and will be one of the most meaningful and fulfilling performances of her career.

### **Alexandra T. Medina**



Alexandra Medina graduated from the University of Texas at San Antonio with a master's in history in 2025. Currently, she is the archive specialist at UTSA Special Collections and the collections curator at the Esperanza Peace and Justice Center archive in San Antonio, Texas. She is passionate about creating public histories that forefront Mexican American histories and the history of gender and sexuality in the United States.

### **Garrett Rouse**



Garrett Rouse is a born and raised San Antonio native and history has played a large role in his life. His interests include Modern American History, the Civil War, and the History of Education. Having earned an MA in History in 2025 from UTSA, Garrett plans to continue his education and aspires to help future generations discover a passion for their own histories.

### **Michael Santos**



Michael Santos loves history, coffee and sports. He currently teaches middle school and aspires to make the jump to collegiate academia. He is currently a candidate for an M.A. in History. His research interests include Caribbean history, Latin American history and African diaspora histories.

### **Collin Ward**



Collin Ward is a historian from San Antonio, Texas. He has spent his life studying the American Civil War, with a particular interest in its lasting impact on the regions and people who fought it, as well as the tactics employed during the various battles. He also loves studying how we choose to interact with the history that has shaped the communities in which we live.