Inquiry-based Teaching of Critical Thinking Skills in Science with slnvestigator

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ABSTRACT

Inquiry-based teaching and learning is recognized as being very effective, but very difficult to use in practice. This report presents an inquiry-based approach to the teaching of critical thinking skills in science with an intelligent computer system called sInvestigator (science Investigator). sInvestigator helps students develop critical thinking skills in addressing scientific problems, through a rigorous yet an easy to employ inquiry-based approach. The report first introduces the computational framework of scientific inquiry as discovery of evidence, hypotheses, and arguments, on which sInvestigator is based. Then it introduces the features of sInvestigator with a couple of illustrative examples, a generic inquiry-based teaching and learning exercise and a specific one. Finally it presents a variety of inquiry-based exercises for use in science classes from middle school through university.

1. Introduction

Significant progress has been made in science education with the development of the National Science Education Standards (NRC, 1996). These standards call for inquiry-based teaching and learning which "refers to the diverse ways in which scientists study the natural world and propose explanations based on the evidence derived from their work." Students practice inquiry as they "describe objects and events, ask questions, construct explanations, test those explanations against current scientific knowledge, and communicate their ideas to others. They identify their assumptions, use critical and logical thinking, and consider alternative explanations" (NRC, 1996, p. 2).

Researchers have demonstrated that academic achievement is improved by the use of inquiry instruction in K-12 levels (Bransford and Donovan, 2004; Minner et al., 2010). Inquiry instruction has also been examined at the college level and found to be more effective than traditional science instruction for the development of thinking and problem solving (Oliver-Hoyo et al., 2004). University science faculty value inquiry, but identify time, class size, student motivation, and student ability as obstacles to implementing inquiry-based instruction (Brown et al., 2006). A significant result in the theory of inquiry-based learning is Process-Oriented Guided-Inquiry Learning (POGIL, 2016), a student-centered, group-learning instructional strategy and philosophy. POGIL provides a general framework for developing activities implementing guided inquiry in the classroom, and there are now many POGIL inquiry-based learning activities in a wide variety of disciplines. However, while POGIL and other inquiry approaches offer an alternative to lectures-style instruction, they depend on intensive training of instructors to develop and implement inquiry-based activities in their classrooms.

The NSF's "Improving Undergraduate STEM Education" program (NSF 14-588) provided support for the development of, and experimentation with an intelligent computer system called sInvestigator (science Investigator), that greatly facilitates the development of a wide variety of inquiry-based teaching and learning experiences for learning critical thinking skills. SInvestigator has built-in features to engage the students in understanding, extending, creating, critiquing, and debating evidence-based scientific argumentations in real-life scientific investigations. This involves using science cross-cutting concepts and disciplinary core ideas, giving the students numerous opportunities to exercise imagination and creativity, and develop critical scientific practices, particularly: (1) Asking questions; (2) Constructing explanations; (3) Engaging in argument from evidence; and (4) Obtaining, evaluating, and communicating explanations (NRC, 2012, p.3). Students' progress is assessed based on their ability to deal with new problems on their own, still using slnvestigator, but without any help from the instructor.

This report presents a freely available intelligent computer system, called slnvestigator (science Investigator), that helps students develop critical thinking skills in addressing scientific problems, through a rigorous yet easy to employ inquiry-based approach. slnvestigator was developed as a customized version of Cogent (Tecuci et al., 2015; 2018a), which incorporates the latest version of the Disciple learning agent theory and technology (Tecuci, 1988; Tecuci 1998; Boicu et al., 2000; Tecuci et al., 2000; Boicu et al., 2001; Tecuci et al., 2002a; Tecuci et al. 2016a). Disciple agents have been demonstrated in many domains, including critical thinking education in history (Tecuci and Keeling, 1999), course of action critiquing (Tecuci et al., 2001), center of gravity analysis (Tecuci et al., 2002b; Tecuci et al., 2005; Tecuci et al., 2008a), intelligence analysis (Tecuci et al., 2008b; Tecuci et al., 2011; Tecuci et al., 2016b; Tecuci et al., 2018a), intelligence, surveillance and reconnaissance (Tecuci et al., 2019), and cybersecurity (Tecuci et al., 2018b; Huang et al., 2020).

The next section introduces the computational framework of scientific inquiry as discovery of evidence, hypotheses, and arguments, on which sInvestigator is based (Tecuci et al., 2016). Then Section 3 presents a generic inquiry-based teaching and learning experience. Section 4 illustrates the features of sInvestigator with a detailed case study. The rest of the sections present a variety of inquiry-based exercises, many of them based on those described in (Osbome et al., 2004).

Additional materials on critical thinking with sInvestigator, including instructions to download the system for both PC and Mac are available at: <u>http://lac.gmu.edu/sInvestigator/</u>

2. Scientific Inquiry as Discovery of Evidence, Hypotheses, and Arguments

Figure 1 illustrates the computational model of scientific inquiry which is at the basis of sInvestigator. When the students and sInvestigator address a specific inquiry, for example: *What type of organism is Euglena?*, they first use *abductive (imaginative) reasoning*, which shows that something is *possibly* true, to hypothesize possible answers:

- Euglena is a plant.
- Euglena is an animal.
- Euglena is another type of organism, neither plant nor animal.

Students will need to analyze each of these hypotheses to determine which one is true. For this, they use each hypothesis to discover relevant evidence. One approach is to ask the question, *What evidence would be observable if this hypothesis were true?* The reasoning might go as follows: If H_k were true, then the sub-hypotheses H_{k1} and H_{k2} would also need to be true. But if H_{k1} were true, then one would need to observe evidence E_{k1} , and so on. This process leads to the discovery of new evidence by identifying the necessary conditions for hypothesis H_k .



Figure 1. Scientific inquiry as discovery of evidence, hypotheses, and arguments.

A broader question that may guide the discovery of evidence is: What evidence would be for or against this hypothesis? In this case one would look for both favoring and disfavoring arguments for the hypothesis H_k to be true. They decompose each hypothesis into simpler and simpler hypotheses by considering favoring arguments (under the left, green square) and disfavoring arguments (under the right, pink square), as illustrated in Figure 2.



Figure 2. Hypothesis in search of evidence.

Favoring argument: IF "Euglena has plant features" THEN "Euglena is a plant" *Disfavoring argument:* IF "Euglena has animal features" THEN "Euglena is <u>not</u> a plant" The sub-hypotheses are further decomposed until the resulting leaf hypotheses are simple enough to point to what evidence would favor or disfavor each of them:

Favoring argument: IF "Eugler

IF "Euglena synthesizes nutrients by photosynthesis" and "Euglena feeds by autotrophy"

THEN "Euglena has plant features"

Search for evidence to determine whether Euglena synthesizes nutrients by photosynthesis. **Search** for evidence to determine whether Euglena feeds by autotrophy.

Finally the students test the hypotheses based on the credibility and relevance of the discovered evidence, and determine which one is true.

3. Generic Inquiry-based Teaching and Learning Experience

Figure 3 illustrates a generic inquiry-based teaching and learning experience with sInvestigator in the context of the "Energy sources" topic.



Figure 3. Generic inquiry-based teaching and learning experience.

- 1. The instructor formulates an inquiry: What type of energy to produce?
- 2. The students hypothesize possible answers: Wind energy, Hydroelectric energy, Nuclear energy, Solar energy.
- 3. The students form teams, each team developing an evidence-based argumentation for assessing the probability of their selected hypothesized answer.
- 4. Each team considers arguments in favor and against the selected hypothesis:

Wind energy Favoring argument: Low production costs – wind is free Disfavoring argument: Each wind turbine does not generate very much energy

5. The students search for evidence on the Internet and evaluate its relevance to the corresponding hypothesis, as well as its credibility:

E1 Low cost of wind energy

Wind energy is one of the cheapest sources of electricity, and it's getting cheaper, Robert Fares on August 28, 2017 in Scientific American. <u>https://blogs.scientificamerican.com/plugged-in/wind-energy-is-one-of-the-cheapest-sources-of-electricity-and-its-getting-cheaper/</u>

Relevance: C (Certain 100%)

Credibility: C (Certain 100%)

- 6. slnvestigator assesses the probability of the hypotheses.
- 7. The teams present and debate their argumentations in class.

The next section presents a detailed example of using inquiry in classroom.

4. Sample Inquiry with slnvestigator in a Science Class

A classical textbook example of using inquiry in a classroom is presented in (NRC, 2000, pp.5-11). The following is an adaptation of that example to show how sInvestigator can naturally support inquiry-based teaching and learning.

« Several of the students in Mrs. Graham's fifth grade science class were excited when they returned to their room after the Spring break. They pulled their teacher over to a window, pointed outside, and said, we noticed something about the trees on the playground. The left one has lost all its leaves, the middle one has multicolored leaves — mostly yellow — while the right one has lush, green leaves. Why are those trees different? They used to look the same, didn't they? Mrs. Graham didn't know the answer. But she knew that her class was scheduled to study plants later in the year, and this was an opportunity for them to investigate questions about plant growth that they had originated and thus were especially motivated to answer. Although she was uncertain about where her students' questions would lead, Mrs. Graham chose to take the risk of letting her students pursue investigations with the assistance of slnvestigator. Let's use slnvestigator to make a list of hypotheses that might explain what's happening to those trees

outside. They used sInvestigator to specify the topic of study, the inquiry, and the following list of competing explanatory hypotheses (see Figure 4):

- It must be too much water that causes a tree to die.
- Insects are eating two of the trees.
- The trees have different ages.



Figure 4. Topic, inquiry, and possible answers.

Mrs. Graham then invited each student to pick one hypothesis which led to several groups, a "water" group, an "illness" group, and an "age" group. She asked each group to use sInvestigator in order to plan and conduct a simple investigation to test their preferred hypothesis.

For the next three weeks, science periods were set aside for each group to carry out its investigation. Each group used sInvestigator to conduct its investigation, discovering a variety of sources with information about characteristics of trees, their life cycles, and their environments.

Let us consider the water group that investigated the hypothesis "There is too much water that causes a tree to die." They decomposed this hypothesis into two simpler hypotheses that showed more clearly what evidence may be used to test it (see Figure 5):

- There is too much water at the root of the dying tree.
- Too much water at the root causes the tree to die.

To discover evidence for the first sub-hypotheses, the water group decided to look at the ground around the trees every hour that they could. They took turns on making individual observations and since some of them lived near the school, their observations continued after school hours and on weekends. Even though they missed some hourly observations, they had sufficient data indicating that there is too much water at the root of the dying tree. They introduced this information into sInvestigator, naming it E1 Water observations, as shown in the right hand side of Figure 5. Then they dragged it on the left (green) square under the "There is too much water at the root of the dying evidence for it.

Now the water group can assess the probability of the "There is too much water at the root of the dying tree" hypothesis based on E1 Water observations, by using the following symbolic probability scale (shown also in the upper-left of Figure 9):

LS (Lacking Support) < L (Likely 55-80%) < VL (Very Likely 80-95%) < < AC (Almost Certain 95-99%) < C (Certain 100%)

In this scale, the considered hypothesis may be "Lacking Support" from evidence, or the evidence may indicate some level of support, such as "Very Likely 80-95%." Each symbolic probability value (e.g., "Very Likely") is abbreviated ("VL") in the sInvestigator analysis whiteboard in order to reduce space usage and facilitate the visualization of larger argumentations.



Figure 5. Hypotheses in search of evidence

To assess the probability of a hypothesis based on an item of evidence, the water group has to first assess the *credibility* and the *relevance* of evidence. Then sInvestigator determines the *inferential force* of evidence and *probability* of hypothesis, as illustrated in Figure 6.

The credibility of the evidence item E1 Water observations is obtained by answering the question: What is the probability that the evidence is true? The students' answer was AC (Almost Certain 95-99%) since a few data points were missing and, on rare occasions, the tree was not standing in the water. This justification was entered into slnvestigator, as shown in the bottom-right of 6.

The *relevance* of the evidence item E1 Water observations is obtained by answering the question: *What would the probability of the hypothesis be if the evidence were true?* The students' answer was certain (C). Indeed, if the evidence item is true then the hypothesis is true.



Figure 6. The credentials of evidence.

The *inferential force* of the evidence item on the hypothesis answers the question, *"What is the probability of the hypothesis, based only on this evidence?"* Obviously, an irrelevant item of evidence will have no inferential force, and will not convince us that the hypothesis is true. An item of evidence that is not credible will have no inferential force either. Only an item of evidence that is both very relevant and very credible will convince us that the hypothesis is true. Consistent with both the Baconian and the Fuzzy min/max probability combination rules (Cohen, 1977, pp.167-187; Zadeh, 1965, pp.340-341; Schum, 1979, pp.460-463), the inferential force of an item of evidence on a hypothesis is determined as the minimum between its credibility and its relevance which, in this illustration, is AC (Almost Certain 95-99%).

Because, in this case, we have only one item of evidence, its inferential force on the hypothesis is also the *probability* of the hypothesis.

Concerning the sub-hypothesis "Too much water at the root causes the tree to die," one of the students recalled that several months ago the leaves on one of his mother's geraniums had begun to turn yellow. She told him that the geranium was getting too much water. This item of information was represented in sInvestigator as the item of evidence E2 Geranium case, favoring the hypothesis. The students agreed to assess its credibility as AC (Almost Certain 95-99%) because, although the mother has experience with plants, she is not a professional. They assessed the relevance as VL (Very Likely 80-95%) because geraniums is a different type of plant. As a result, sinvestigator assessed the inferential force of E2 Geranium case as VL (Very Likely 80-95%). Additionally, the students searched the Internet and found the article "We Had Plenty of Rain; Why Are My Trees Dying?" by Sheila Dunning from the University of Florida, stating that a saturated soil may result in the death of the tree. The students conducted a deeper credibility analysis by assessing author's competence (affiliation and history), objectivity (relationship to current knowledge and conflict of interest), and publication's reputation, and sInvestigator computed the credibility as C (Certain 100%). The relevance was also assessed as C (Certain 100%), leading sinvestigator to assess its inferential force as C (Certain 100%). Additionally, sInvestigator assessed the inferential force of all favoring evidence (i.e., both E2 Geranium case and E3 Saturated soil) as C (Certain 100%), by taking the maximum of their inferential forces. This is also the probability of the hypothesis "Too much water at the root causes the tree to die" because no disfavoring evidence was found. However, if any disfavoring evidence would have

been found, then slnvestigator would have determined whether, on balance, the totality of evidence favors or disfavors the hypothesis, and to what degree.

Having assessed the probability of "There is too much water at the root" as AC (Almost Certain 95-99%), and that of "Too much water at the root causes the tree to die" as C (Certain 100%), sInvestigator inferred the probability of their top-level hypothesis "There is too much water at the root that causes a tree to die" as AC (Almost Certain 95-99%). This is the minimum between these probabilities and the joint relevance of the two sub-hypotheses, which is C (Certain 100%) (see the left part of Figure 7).



Figure 7. Hypotheses testing.

The "illness" group searched for insects on the trees. Some ants were noticed on all the trees, but without any significant difference between the trees to justify why one of the trees was dying because of them. This information was entered as evidence item E4 Some ants on all trees, disfavoring the hypothesis that "Insects are eating one of the trees." Therefore sInvestigator concluded that there is no support for this hypothesis (see Figure 7).

Similarly, the "age" group answered their question fairly quickly. They contacted the PTA members who were involved in planting that part of the playground and found the original receipts for the purchase of the trees. A check with the nursery indicated that all three trees were identical and of approximately the same age when purchased.

Finally, slnvestigator automatically generated a report for each group, describing the analysis logic, citing sources of data used, and the manner in which the analysis was performed. These reports were further edited by the groups before being presented to the class.

As different groups presented and compared their analyses, the class learned that some evidence — such as that from the group investigating whether the trees have different ages — did not explain the observations. But the explanation that seemed most reasonable to the students, that fit all the observations and conformed with what they had learned from other sources, was "too much water." After their three weeks of work, the class was satisfied that together they have found a reasonable answer to their question. » (adapted from NRC, 2000, pp.5-11).

The next sections present various types of inquiry-based exercises.

5. Analysis of Competing Scientific Theories

5.1. Competing Theories of Light

The aim of this exercise, adapted from (Osbome et al., 2004, pp.31-33), is to explore alternative theories for why we see things, by developing evidence-based argumentations.

5.1.1. Inquiry: How do we see things?

Consider the following competing theories on how we see things:

Theory 1: Light rays travel from our eyes onto the objects and enable us to see them.

Theory 2: Light rays are produced by a source of light and reflect off objects into our eyes so we can see them.

The students will have to search for evidence on the Internet to determine which one is true. To facilitate their task, they are provided with the following statements that may be used to develop favoring and disfavoring arguments for the two hypothesized theories:

- Light travels in straight lines.
- We can still see at night when there is no sun.
- Sunglasses are worn to protect our eyes.
- If there is no light we cannot see anything.

5.1.2. Argumentations





5.2. Competing Theories of Ice Melting and Water Boiling

In this exercise, adapted from (Osbome et al., 2004, pp.59-62), the students are presented with the contrasting graphs from Figure 8 of temperature against time as ice is heated to water vapor.



Figure 8. Contrasting graphs of temperature against time as ice is heated to water vapor, reproduced from (Osbome et al., 2004, p. 61).

They have to determine which graph is correct (if any) by developing evidence-based argumentations. Their task is facilitated by presenting them with statements that may support one graph or the other.

5.2.1. Inquiry: How does the temperature vary as a function of time when heating ice to steam?

Potentially useful statements:

- Ice will melt when it is heated and turns into water.
- In solids there are bonds between the particles that hold them together in fixed shape.
- When you heat a substance the supply of heat energy is usually constant.
- Energy is needed to break bonds between particles.
- Ice melts at 0 degrees Celsius and boils at 100 degrees Celsius.
- Whilst energy is being used to break bonds between particles there will be no temperature increase.
- When a substance is heated the particles in it absorb heat energy and move about more quickly, and its temperature increases.

5.2.2. Argumentations









5.3. Competing Theories of Snowman Melting

The aim of this exercise, adapted from (Osbome et al., 2004, pp.50-55), is to determine which snowman - one wearing a coat or the other one not wearing a coat - will melt first, by building evidence-based argumentations.

5.3.1. Inquiry: Which showman will melt first?

Which snowman will melt first, Fred (the snowman with the coat) or Birt (the showman without the coat)?

5.3.2. Argumentations







6. Predicting, Observing and Explaining the Result of an Experiment

This is an example, adapted from (Osbome et al., 2004, pp.7-11), of a "predict, observe, and

explain" experiment to learn about combustion: A burning candle inside a container with water is covered with a glass (see Figure 9). Students are asked to predict what will happen with the candle and the water level inside the glass, perform the experiment, and observe the actual results. Finally they are asked to develop two evidence-based



argumentations that explain the results of the experiment.

6.1. Inquiry: Why does the candle burn out?

The students are asked to explain why the candle burns out when it is covered with the glass.

6.2. Argumentation: Candle burns out



6.3. Inquiry: Why does the water level inside the glass raise?

The students are asked to explain why the water level inside the glass raises.

6.4. Argumentation: Water level rises



7. Explaining the Result of a Chemical Experiment

This is an actual experiment conducted in the course taught by prof. Robin Taylor at the Thomas Jefferson High School for Science and Technology, in Fairfax, Virginia.

7.1. Inquiry: Do the experiments confirm the law of conservation of mass?

The aim of this exercise, created primarily by Anya Parekh, is to develop an evidence-based argumentation that explains the results obtained by individual students in a Chemistry experiment designed to verify the Law of Conservation of Mass.

7.2. Argumentation



8. Explaining a Physical Phenomenon

8.1. Dropping a Box

The aim of this exercise, adapted from (Osbome et al., 2004, pp.47-49), is to explore forces that act upon a dropping box and to develop evidence-based argumentations on how an object falls.

8.1.1. Inquiry: How does a box fall?

A box is dropped from an airplane and falls to the ground. The sequence of statements in the boxes below explain how the box falls.

For each box that contains a single statement develop an evidence-based argumentation to show that the statement is true.

For each box that contains multiple statements, develop an evidence-based argumentation to determine which statement is true.

Then compose an argumentation to answer the question: How does a box fall?

1	There	is a	force	of	gravity	on	the box.	
-	THEFE	15 U	10100	U 1	Sidvity	011	the box.	

2 This acts downwards.

How does the force change throughout the fall?

3a It is roughly the same size throughout the fall.

3b It gets a lot bigger as the box gets closer to the Earth.

3c It is biggest when the box is high up and gets a lot smaller as it falls.

What is the effect of the force on the box?

4a This force makes the box begin to accelerate downwards.

4b This force makes the box begin to move downwards at a steady speed.

5 Once the box begins to move, there is also an air resistance force on it.

In what direction does the air resistance force act?

6a This acts downwards, in the direction the box is going.

6b This acts upwards, in the opposite direction to the box's motion.

Does the air resistance force change?

7a The size of the air resistance force on the box is constant throughout the fall.

7b The air resistance force gets bigger as the box gets faster.

Should the air resistance force be taken into account?

8a The air resistance force on the box is much smaller than the force of gravity, and so it can be ignored.

8b The air resistance force on the box becomes quite large, and has to be taken into account.

What is the total force on the box?

9a The total force on the box is equal to the force of gravity, and is constant.

9b The total force on the box is the sum of the gravity force and air resistance, and this gets gradually less as it falls, because the air resistance increases.

What is the acceleration throughout the fall?

10a The box has a uniform acceleration throughout its fall.

10b The acceleration of the box is biggest to begin with, and gets gradually less. Once the air resistance force becomes equal to the gravity force, the acceleration is zero and the box then falls at a steady speed.

10c The box falls at a steady speed throughout it fall.

8.1.2. Argumentations













8.2. Playing Golf

This exercise, adapted from (Osbome et al., 2004, pp.56-58), considers the situation where a golfer has driven a golf ball and the ball is falling freely onto the green. The students are asked to develop evidence-based argumentations in order to determine the truthfulness of a number of statements. The students will need to have some knowledge of the concepts of force, velocity, distance, weight, air resistance and speed.

8.2.1. Inquiry

Which of the following statements are true and which are false?

- The only forces on the ball, once it's been hit by the club, are its weight and air resistance.
- The force from the golf club acts on the ball until it stops moving.
- The force which he or she has put into the ball by striking it is being used up as it travels through the air.
- The force from his or her drive wore off at the point where the ball started to drop.
- The net force is always in the same direction as the ball is moving.
- The various forces on the ball can't be thought of as one single net force.

8.2.2. Argumentations











9. Classifying an Organism

The aim of this exercise, adapted from (Osbome et al., 2004, pp.26-30), is to determine whether the single cell organism euglena is a plant, an animal, or another type of organism, by developing an evidence-based argumentation.

9.1. Inquiry: What type of organism is Euglena?

Euglena is an organism that has both plant and animal characteristics, including the following ones:

- Euglena has two outer layers.
- Euglena contains chloroplasts.
- Euglena has a nucleus.
- Euglena is a single cell.
- Euglena can absorb food from its surrounding.
- Euglena confused early scientists.
- Euglena is normally green.
- The nucleus contains DNA and controls the cell activities.
- Chloroplasts enable a cell to photosynthesize.
- A vacuole controls the amount of liquid in a cell.
- Euglena swims through water.
- Euglena can make its own food.

Develop argumentations to determine which of the following hypothesis is true:

- Euglena is a plant
- Euglena is an animal
- Euglena is another type of organism, neither plant nor animal

9.2. Argumentations







10. Arguing about a Socio-Scientific Issue

The aim of this exercise, adapted from (Osbome et al., 2004, pp.37-39), is to provide an opportunity for students to engage in argumentation about a socio-scientific issue - the funding of a new zoo - and to provide justifications for their point of view by doing internet research to construct arguments, justified with evidence, either for or against the new zoo.

10.1. Inquiry: Should we have a new zoo?

To facilitate students' Internet research and the development of their argumentation, they are asked to consider the following sets of questions.

Questions to stimulate agreement with zoos:

- Are wild animals killed by hunters and poachers?
- Are animals in zoos well fed?
- Are animals in zoos safe from predators that want to kill them?
- Do zoos allow you to see a large number of different animals?
- Would animals have become extinct if it wasn't for zoos?
- Can you see wild animals on the television living in their natural homes?
- Do wild animals have to find their own food?
- Can zoos release animals back to the wild?
- Do zoos allow scientists to study rare animals?

Questions to stimulate disagreement with zoos

- Do animals in the wild have lots of places to live in?
- Is it cruel to keep animals in cages?
- Can wild animals be protected in parks and nature reserves?
- Are wild animals afraid of human beings?
- Can animals be bored and lonely in zoos?
- Can animals breed in zoos?

10.2. Argumentation







11. Exploring a Mystery

Amelia Mary Earhart (born July 24, 1897 – disappeared July 2, 1937, declared dead January 5, 1939) was an American aviation pioneer and author. During an attempt to make a circumnavigational flight of the globe in 1937 in a Lockheed Model 10-E Electra, Earhart and navigator Fred Noonan disappeared over the central Pacific Ocean near Howland Island (https://en.wikipedia.org/wiki/Amelia Earhart).

11.1. Inquiry: What happened to Amelia Earhart?

The aim of this exercise is to explore various theories on Amelia Earhart's disappearance by developing evidence-based argumentations.

Four possible theories are to be explored:

- Amelia Earhart's Electra landed on the Nikumaroro Island and died of thirst or starvation.
- Amelia Earhart purposely disappeared and assumed a new identity.
- Amelia Earhart was captured by Japan and executed as a United States spy.
- Amelia Earhart's Electra crashed into the ocean and sank.

11.2. Argumentations

















Evidence

E17 Earhart briefcase on Saipan (Former U.S. Marine Robert Wallack claimed he and other Marines opened a safe on Saipan and found Earhart's briefcase.)

E18 wrecked aircraft resembling Electra (In 1990, Donald Angwin, a veteran of the Australian Army's World War II campaign in New Britain, contacted researchers to suggest that a wrecked aircraft he had witnessed in jungle about 40 miles (64 km) southwest of Rabaul, on April 17, 1945, may have been Earhart's Electra.[Billings, David, 2000] Angwin, who was a corporal in the 11th Battalion at the time,[Angwin, Donald Arthu, 2002] reported that he and other members of a forward patrol on Japanese-occupied New Britain had found a wrecked twin-engined, unpainted all-metal aircraft. The soldiers recorded a rough position on a map, along with serial numbers seen on the wreckage. While the map was located in the possession of another veteran in 1993, subsequent searches of the area indicated failed to find a wreck.[Billings, David, 2000] Billings, David. "Aircraft Search Project in Papua New Guinea." Wings Over Kansas, 2000. Retrieved: March 27, 2012.

http://www.wingsoverkansas.com/earhart/a850/ "Angwin, Donald Arthur." Commonwealth of Australia: Military Forces, 2002. Retrieved: March 27, 2012.)

E19 wrecked aircraft resembling Electra (While Angwin died in 2001, David Billings, an Australian aircraft engineer, has continued to investigate his theory. Billings claims that the serial numbers written on the map, "600H/P S3HI C/N1055", represent: • a 600 hp (450 kW) Pratt & Whitney R-1340-S3HI model engine and; • "Constructor's Number 1055", an airframe identifier. These would be consistent with a Lockheed Electra 10E, such as that flown by Earhart, although they do not contain enough information to identify the wreck in question as NR16020. [Billings, David, 2000] Billings, David. "Aircraft Search Project in Papua New Guinea." Wings Over Kansas, 2000. Retrieved: March 27, 2012. http://www.wingsoverkansas.com/earhat/a850/)

E20 Earhart and Noonan captured and executed (In 1966, CBS Goerner published a book claiming Earhart and Noonan were captured their aircraft crashed on the island of Saipan, part of the Mariana Islam it was under Japanese occupation.["Obituary: Fred Goerner, Broadcast Times, September 16, 1994]["Sinister Conspiracy?" Time Magazine, Se 29][Goerner 1966, p. 304][[N 30] "Obituary: Fred Goerner, Broadcaster Times, September 16, 1994].

http://www.nytimes.com/1994/09/16/obituaries/fred-goerner-broadca Conspiracy?" Time Magazine, September 16, 1966. Retrieved: July 2, 2 http://content.time.com/time/magazine/article/0,9171,836416-2,00.ht book was immediately challenged, but the Time Magazine article on it from Admiral Chester W. Nimitz, who allegedly told Goerner in March 1 you Earhart and her navigator did go down in the Marshalls and were p

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"Amelia Earhart FAQ." tighar.org. Retrieved: July 10, 2010. http://tighar.org/Projects/Earhart/Archives/Forum/FAQs/captured.htm)

E25 Howland Island-very small (Their intended destination was Howland Island, a flat sliver of land 6,500 ft (2,000 m) long and 1,600 ft (500 m) wide, 10 ft (3 m) high and 2,556 miles (4,113 km) away.)

E26 Indistinguishable signals (The Itasca used her oil-fired boilers to generate smoke for a period of time but the fliers apparently did not see it. The many scattered clouds in the area around Howland Island have also been cited as a problem: their dark shadows on the ocean surface may have been almost indistinguishable from the island's subdued and very flat profile.)

E27 Electra was not fully fueled (British aviation historian Roy Nesbit interpreted evidence in contemporary accounts and Putnam's correspondence and concluded Earhart's Electra was not fully fueled at Lae. [Strippel 1995, p. 58] Strippel, Richard G. "Researching Amelia: A Detailed Summary for the Serious Researcher into the Disappearance of Amelia Earhart." Air Classics, Vol. 31, No. 11, November 1995.)

E28 Earhart expertise issues (uring the takeoff run, Earhart ground-looped, circumstances of which remain controversial. Some witnesses at Luke Field including the Associated Press journalist on the scene said they saw a tire blow.[Rich 1989, p. 245.] Earhart thought either the Electra's right tire had blown and/or the right landing gear had collapsed. Some sources, including Mantz, cited pilot error.[Rich 1989, p. 245.] Rich, Doris L. Amelia Earhart: A Biography. Washington, D.C.: Smithsonian Institution Press, 1989. ISBN 1-56098-725-1.)

E29 Earhart expertise (Some sources have noted Earhart's apparent lack of understanding of her direction-finding system, which had recently fitted to the aircraft just prior to the flight. The system was equipped with a new receiver from Bendix that operated on five wavelength "bands", marked 1 to 5. The loop antenna was equipped with a tuneable loading coil that changed the effective length of the antenna to allow it to work efficiently at different wavelengths. The tuner on the antenna was also marked with five settings, 1 to 5, but, critically, these were not the same frequency bands as the corresponding bands on the radio. The two were close enough for settings 1, 2 and 3, but the higher frequency settings, 4 and 5, were entirely different. Earhart's only training on the system was a brief introduction by Joe Gurr at the Lockheed factory, and the topic had not come up. A card displaying the band settings of the antenna was mounted so it was not visible. Gurr explained that higher frequency bands would offer better accuracy and longer range.[Elgen and Marie Long, "Amelia Earhart: The Mystery Solved", p. 116] Long, Elgen M. and Marie K. Amelia Earhart: The Mystery Solved. New York: Simon & Schuster, 1999. ISBN 0-684-86005-8.)

E30 Direction miscalculation (William L. Polhemous, the navigator on Ann Pellegreno's 1967 flight which followed Earhart and Noonan's original flight path, studied navigational tables for July 2, 1937 and thought Noonan may have miscalculated the "single line approach" intended to "hit" Howland.[Strippel 1995, pp. 59. 601 Strippel 2000 Carbon Amelia: A Datailed Summary for the Stripper 1995.

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E31 Earhart unable to determine direction of Morse signals (Her 7:58 am transmission said she couldn't hear the Itasca and asked them to send voice signals so she could try to take a radio bearing. They couldn't send voice at the frequency she asked for, so Morse code signals were sent instead. Earhart acknowledged receiving these but said she was unable to determine their direction.[Jacobson, Randall 5., 2009] Jacobson, Randall S., PhD. "The Final Flight. Part 3: At Howland Island." tighar.org, 2009. Retrieved: July 10, 2010. http: //tighar.org/Projects/Earhart/Archives/Research/ResearchPapers/Worldflight/finalflight3.html)

E32 Noonan expert navigator (Through contacts in the Los Angeles aviation community, Fred Noonan was subsequently chosen as a second navigator because there were significant additional factors which had to be dealt with while using celestial navigation for aircraft. [Long 1999, p. 65.] [Post and Gatty 1931, pp. 45-56.] He had vast experience in both marine (he was a licensed ship's captain) and flight navigation. Noonan had recently left Pan Am, where he established most of the company's China Clipper seaplane routes across the Pacific. Noonan had also been responsible for training Pan American's navigators for the route between San Francisco and Manila.[Grooch 1936, pp. 177, 189.][Noonan also navigated the China Clipper on its first flight to Manila, departing Alameda under the command of Captain Ed Musick, on November 22, 1935.] The original plans were for Noonan to navigate from Hawaii to Howland Island, a particularly difficult portion of the flight; then Manning would continue with Earhart to Australia and she would proceed on her own for the remainder of the project. Long, Elgen M. and Marie K. Amelia Earhart: The Mystery Solved. New York: Simon & Schuster, 1999. ISBN 0-684-86005-8. Post, Wiley and Harold Gatty. "Chapter III, "Driving from the back seat." Around the World in Eight Days. New York: Rand McNally & Company, 1931. Grooch, William Stephen. Skyway to Asia. New York: Longmans, Green and Co., 1936. No ISBN.)

E33 Communication problem (Another cited cause of possible confusion was that the Itasca and Earhart planned their communication schedule using time systems set a half hour apart, with Earhart using Greenwich Civil Time (GCT) and the Itasca under a Naval time zone designation system.[Hoversten 2007, np. 22-23.] New

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E34 antenna problem (Motion picture evidence from Lae suggests that an antenna mounted underneaht he hisselage may have been torm off from the fuel-have y lectra during taxl or takeoff from Lae's turf runway, though no antenna was reported found at Lae.)
E35 antenna cut off (Don Dwiggins, in his biography of Paul Mantz (who assisted Earhart and Moonan in their linght planning), noted that the avaitars had cut off their long-wire antenna, due to the annoyance of having to crank it back into the aircraft after each use.)

E36 direction finder (During Earhart and Nooman's approach to Howland Island the Itasca received strong and clear voice transmissions from Earhart Identifying as KHAQQ but she apparently was unable to hear voice transmissions from the ship. Signals from the ship would also be used for direction finding, implying that the aircraft's direction finder was also not functional.)

E37 Communication with Howland (At 6:14 am another call was received stating the aircraft was within 200 miles (320 km), and requested that the ship use its direction finder to provide a bearing for the aircraft. Earthart began whisting into the microphone to provide a continuel signal for them to home in on. (Candace Fleming, 2011, p. 3.) It was at this point that the radio operators on the Itasca realized that their RDF system could not tune in the aircraft's 3015 kHz frequency; radioman Leo Bellarts later commented that he "was sitting there sweating blood because I couldn't do a dam thing about it." A similar call asking for a bearing was received at 6:45 am, when Earthart estimated they were 100 miles (160 km) out.[Candace Fleming, 2011, p. 4.] Candace Fleming, "Amelia Lost: The LIF and Disappearance of Amelia Earthart", Random House, 2011.)

E38 Radio communication problems (Whether any post-loss radio signals were received Earhart and Noonan remains unclear. If transmissions were needived from the Electra, most I frequency restricted to aviation use in the United States by the FCCL[American Radio Relay L 1945, p. 45.3]. This frequency was not thought to be fit for howdcasts over great distances. I Earhart was at cruising altitude and midway between Lae and Howland (over 1,000 miles (1, frequency, restricted to aviation use in the United States by the FCCL[American Radio Relay L Earhart was at cruising altitude and ther schedule transmission at 0815 GCT.[Long 1999, p. 20, Moreover, the 50-wait transmitter used by Earhart was attached to a less-than-optimum-len antenna.[Everete, Michae], 2009[]American Radio Relay League 1945, pp. 196–193.][N 19] Radio Relay League 1945, p. 453. Qude: "Frequencies between 2,504 to 3,497.5 k: were all "Coastal harbor, government, aviation, fixed, miscellaneous", Long, Eigen M. and Marie K. An Earhart: The Mystery Solved. New York: Simon & Schuster, 1999. ISBN 0-684-66005-8. Evere Michael. "Electric Radio Cammunications Equipment Installed on Board Lockeed Electra NR11 tighar-org, 2009. Retrieved: July 10, 2010. http://lighar. org/Protect/ElectraRadios.html / Research/Resea

org/rrogects/Learnart/Archives/Research/Resear Wavelength above the ground will be less efficient than that same antenna operating at cruis altitude.)

E39 Earhart unable to hear Itasca (Her 7:58 am transmission said she couldn't hear the Itasca and asked them to send voice signals so she could try to take a radio bearing..... [Jacobson, Randall S., 2009] Jacobson, Randall S., PhD. 'The Final Flight net 3: At Howland Island.' tiphar.org, 2009. Retrieved: July 10, 2010. http://tiphar. org/Projects/Earhart/Archive/Research/Research/Baescr/Davellight/Hinalflight3.html)

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E38 Radio communication problems (Whether any post-loss radio signals were received from Earhart and Noonan remains unclear. If transmissions were received from the Electra, most if not all were weak and hopelessly garbled. Earhart's voice transmissions to Howland were on 3105 kHz, a frequency restricted to aviation use in the United States by the FCC.[American Radio Relay League 1945, p. 453.] This frequency was not thought to be fit for broadcasts over great distances. When Earhart was at cruising alittude and midway between Lae and Howland (over 1,000 miles (1,600 km) from each) neither station heard her scheduled transmission at 0815 GCT.[Long 1999, p. 20.] Moreover, the 50-wait transmitter used by Earhart was attached to a less-than-optimum-length V-type antenna.[Everette, Michael, 2009][American Radio Relay League 1945, pp. 196–199.][N 19] American Radio Relay League 1945, p. 453. Quote: "Frequencies between 2,504 to 3,497.5 kc were allocated to "Coastal harbor, government, aviation, fixed, miscellaneous." Long, Elgen M. and Marie K. Amelia Earhart: The Mystery Solved. New York: Simon & Schuster, 1999. ISBN 0-684-86005-8. Everette, Michael. "Electric Radio Communications Equipment Installed on Board Lockeed Electra NR16020." tiphar.org, 2009. Retrieved: July 10, 2010. http://tiphar.

org/Projects/Earhart/Archives/Research/Research/Papers/ElectraRadios/ElectraRadios.htm N 19: The height of the antenna is important, a horizontally polarized antenna operating at a small fraction of its wavelength above the ground will be less efficient than that same antenna operating at cruising altitude.)

E39 Earhart unable to hear Itasca (Her 7:58 am transmission said she couldn't hear the Itasca and asked them to send voice signals so she could try to take a radio bearing. ... [Jacobson, Randall S., 2009] Jacobson, Randall S., PhD. "The Final Flight. Part 3: At Howland Island." tighar.org, 2009. Retrieved: July 10, 2010. http://tighar.

org/Projects/Earhart/Archives/Research/ResearchPapers/Worldflight/finalflight3.html)

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E40 Low accuracy of radio direction finding (Fred Noonan had earlier written about problems affecting the accuracy of radio direction finding in navigation.[Noonan, 1935] Noonan, Fred. Memo to Operations Manager, Pacific Division, Pan American Airlines, April 29, 1935: "The inaccuracies of direction finding bearings can be very definitely cataloged: twilight effects, faint signals, wide splits of minima and inaccurate calibration.")

E41 Electra gas running low (At 7:42 am Earhart radioed "We must be on you, but cannot see you—but gas is running low.]Dacobson, Randall S., 2009] Jacobson, Randall S., PhD. "The Final Flight. Part 3: At Howland Island." tighar.org, 2009. Retrieved: July 10, 2010. http://tighar. org/Projects/Earhart/Archives/Research/Research/Papers/Worldflight/finalflight3.html)

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The views and conclusions contained in this document are those of the authors and should not be interpreted as necessarily representing the official policies or endorsements, either expressed or implied, of the U.S. Government.

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