LESSON PLAN: Ernest Shackleton and his expeditions to Antarctica (Grades 6-8)

INTRODUCTION: Ernest Shackleton’s life as an Antarctica explorer is one of the most compelling and amazing stories of perseverance in the face of almost certain defeat. Shackleton’s story can be shared with students to teach not only the geography of Antarctica but also the importance of perseverance and teamwork to accomplish a goal, whether that goal is a modest one or an ambitious one requiring advanced planning and superior teamwork.

Shackleton was born in Ireland in 1874. In 1901, Shackleton’s first adventure to Antarctica was carried out as a member of the British Royal Navy. In 1908, Shackleton led the Nimrod expedition that sought to reach the South Pole. He came within 97 miles of the South Pole before turning back due to severe conditions that threatened his crew’s survival. On October 28, 2008, descendents of Shackleton and his men set out to recreate the Nimrod Expedition to the South Pole as a tribute to their ancestors. The expedition chose one crew member from the general public and 3000 people applied for the last position on the crew.

Shackleton’s experiences prepared him to lead his famous 1914 expedition to Antarctica on board the ship, Endurance. Shackleton wanted to be the first explorer to cross Antarctica and he chose a route across the South Pole. However, ice engulfed his ship in the Weddell Sea and it sank in November 1915 but the men had already abandoned the ship and were living on the ice. Shackleton brought along a photographer so there is video of the Endurance sinking. The crew eventually reached safety on Elephant Island in April 1916 but there was only one choice for long term survival. Shackleton and five crew members took a 22-foot wooden boat, the James Caird, and traveled 800 miles to South Georgia Island to get help for his men. They landed on the west coast of the island and had to cross a glacier to get to the whaling station on the other side of the island. With severe weather conditions on Antarctica and limited rescue option in the early 1900’s, it took Shackleton four attempts to return to Elephant Island and rescue his men on August 30, 1916. All members were rescued. Many of his crew members returned to England and fought in World War I. Shackleton died in 1922 on another expedition to Antarctica and is buried on South Georgia Island.

GOAL: To use the story of Ernest Shackleton as the foundation to learn not only about the geography of Antarctica but also the qualities of effective leadership and the importance of teamwork.

OBJECTIVES:
1. To identify Antarctica on a world map and compare its climate to other continents.
2. To research existing bases in Antarctica and activities being carried out there to advance the body of knowledge about global climate change.
3. To analyze the story of Shackleton’s life as an explorer and identify what characteristics were most important to his success as a leader.
4. To compare modern day expeditions and gear needed to travel to Antarctica to those of the early 1900’s.

MATERIALS: world map, poster paper, markers, outdoor gear catalogs

ACTIVITIES:
1. As a class activity, locate Antarctica on a world map and discuss the differences between an Antarctica “summer” and “winter” to learn about the climate. Find the following points of interest on the map: South Pole, Elephant Island, South Georgia Island, Weddell Sea, Cape Horn, Drake Passage, Lemaire Channel. Note latitude and longitude points for land masses such as Cape Horn and South Georgia Island.

2. Read a biography of Ernest Shackleton’s life and either assign the book to read or summarize the story of his life to students. Show video of the Endurance sinking (refer to sources for link to video). Students will become very interested in what happened to the men after seeing the video.

3. Look up the definition of perseverance and display prominently in the classroom.

4. Divide class into groups to research Shackleton’s adventures after reaching Elephant Island and leaving on the James Caird to get help and those of his men who remained on Elephant Island. For the men left behind, strict discipline remained to keep their morale high. For example, each day, crew members had to have their bags ready in case they were rescued. For Shackleton and his crew on the James Caird, they faced unbelievable challenges to navigate in the severe weather. Have students research how Shackleton’s navigator used a sextant to navigate even in the most severe, white out conditions.

5. Have one group of students research clothing that is required to travel to Antarctica today and compare that gear to Shackleton’s gear. Students can bring in outdoor gear catalogs.

6. Have one group research the start of World War I as a concurrent event to Shackleton’s expedition.

7. Bring groups together to share their research and discuss the qualities of good leaders while discussing the details of the expedition and subsequent rescue efforts. List leadership qualities that Shackleton exhibited on a large piece of poster paper and then compare those qualities to modern day leaders of all ages and locations. Who is a good leader at school? At home? In the community? Doris Kearns Goodwin has summarized the qualities of effective presidents. Research those and compare to Shackleton’s qualities. Are there similarities and differences?

EXTENDED ACTIVITIES

1. Have students write a composition on the lessons of leadership learned from Shackleton’s story and how it applies to their own lives.

2. Produce a PPT presentation on the story of Shackleton’s life to show to younger students at school and possibly even parents and other faculty.

3. Show the movie, Apollo 13, about astronauts who had to abandon their mission to the moon. Compare and contrast to Shackleton’s story especially in terms of leadership and perseverance needed to survive daunting obstacles to survival.

EVALUATION

1. To evaluate individual achievement, each student should be asked to discuss the Shackleton story to assess depth of knowledge on both Antarctica and the Shackleton expedition. A test on the geography and climate of Antarctica can be prepared.

2. Keep a class journal to note evidence of new leadership qualities in students and ask students after a few months of studying Shackleton if it had any impact on them. If so, note in journal. Have students contribute entries to the journal. Discuss at intervals throughout the year.
SOURCES
1. Shackleton wrote two books, *The Heart of the Antarctic* (1909) and *South* (1919). *Endurance: Shackleton’s Incredible Voyage* is the story of Shackleton written by Alfred Lansing. It is an excellent resource and great summer reading in preparation for the year.
3. Video of Endurance sinking:
4. [www.pbs.org/wgbh/nova/shackleton](http://www.pbs.org/wgbh/nova/shackleton)