

# The Monroe Doctrine: Origin and Early American Foreign Policy



*Portrait of James Monroe, fifth President of the United States, by Gilbert Stuart. Courtesy of American Memory at the Library of Congress.*

**Grade Level:** High School (can be modified for Middle School)

**Subject Areas: History and Social Studies**

U.S. History - Colonial America and the New Nation

U.S. History - Immigration/Migration

U.S. History - Native American

**—Curriculum Unit Overview—**

[This document is] the most momentous [pronouncement] which has been . . . offered . . . since that of Independence. That made us a nation. This sets our compass and points the course.

—[Thomas Jefferson to James Monroe, October 24, 1823](#) (from correspondence in which the authors discussed ideas eventually incorporated into the Monroe Doctrine).

In Monroe's message to Congress on December 2, 1823, [the President] delivered what we have always called the Monroe Doctrine, although many assert that it should have been called the Adams Doctrine.

## Introduction

James Monroe spent most of his life in public office, devoting a significant portion of his career to foreign affairs. He served as George Washington's Minister to France, but was eventually recalled by the President. Thomas Jefferson appointed Monroe as a special envoy for negotiating the purchase of New Orleans and West Florida. He and principal negotiator Robert Livingston exceeded their authority and all expectations by acquiring the entire Louisiana Territory as well as a claim to all of Florida. Next, Monroe became Minister to Great Britain. Under James Madison, he served as Secretary of State and Secretary of War.

Monroe brought a vision of an expanded America to his presidency—a vision that helped facilitate the formulation of what has become known as the Monroe Doctrine. Because this Doctrine bears his name, the general public is not inclined to recognize the significant contributions made by Secretary of State John Quincy Adams and unofficial presidential advisor Thomas Jefferson.

In this unit, students will review the Monroe Doctrine against a background of United States foreign relations in the early years of the republic. In particular, they will examine Monroe's involvement in American diplomacy while serving in a variety of positions before he was elected president. They will become familiar with Monroe's beliefs in an expanded United States as well as an expanded role for the United States in the Americas. Students will also read primary source material reflecting the independence movement in South America, which served as the direct impetus for the Monroe Doctrine. Finally, small groups will analyze some documentary evidence of Adams's role and Jefferson's advice regarding the Monroe Doctrine. The class will debate how credit for the Doctrine should be "allocated."

This unit of study prepares students to reflect on the Doctrine. What were its most significant goals? In what ways, if any, was it intended to provide peace and safety for the United States, protect the newly

independent Latin American states, and/or promote expansionist goals of the United States in the Western Hemisphere?

In Monroe's message to Congress on December 2, 1823, he delivered what we have always called the Monroe Doctrine, although some assert that it should have been called the Adams Doctrine because of the substantial input of John Quincy Adams. When students read correspondence between Monroe and former President Thomas Jefferson, they also will note Jefferson's apparent influence on Monroe. In the culminating lesson of this unit of study, students will decide for themselves if the famous Doctrine has been correctly or incorrectly named. Any well-reasoned conclusion based on evidence will be fine because this unit has a different underlying purpose: As students explore the relative influence of Monroe, Adams, and Jefferson on the Monroe Doctrine, they also will be analyzing the Monroe Doctrine itself and events contemporary to it.

### Guiding Questions

- What were the circumstances leading to the formulation of the Monroe Doctrine?
- What were its major provisions?
- What were Monroe's contributions to American foreign policy prior to and during his terms as president?
- What contributions did John Quincy Adams and Thomas Jefferson make to the formulation of the Monroe Doctrine?

### Learning Objectives

After completing all of the lessons in this unit, students will be able to:

- List events in early American diplomatic history that contributed to the formulation of the Monroe Doctrine.
- Discuss the reasons President Monroe used when recommending that Congress recognize the revolutionary governments of Spanish America.
- Paraphrase the central points of the Monroe Doctrine.
- Weigh the relative contributions to the Monroe Doctrine of President Monroe, Secretary of State John Quincy Adams, and former President and unofficial advisor Thomas Jefferson.
- Decide whether the Doctrine was intended to provide peace and safety for the United States, protect the newly independent Latin American states, and/or promote expansionist goals of the United States in the Western Hemisphere.

### Unit Lessons

- Lesson One—The Monroe Doctrine: U.S. Foreign Affairs (circa 1782-1823) and James Monroe
- Lesson Two—The Monroe Doctrine: President Monroe and the Independence Movement in Spanish America
- Lesson Three: The Monroe Doctrine: A Close Reading
- Lesson Four—The Monroe Doctrine: Whose Doctrine Is It?

### Selected Websites

[Library of Congress: American Memory](http://memory.loc.gov/) [http://memory.loc.gov/]

- [1818, November 28 From Adams](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=539) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=539]
- [Act of the Independence of Peru \(July 15, 1821\)](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=834) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=834]
- [Background on Letter, James Monroe to Thomas Jefferson seeking foreign policy advice, 17 October 1823](http://lcweb2.loc.gov/cgi-bin/query/r?ammem/mcc:@field(DOCID+@lit(mcc/082))) [http://lcweb2.loc.gov/cgi-bin/query/r?ammem/mcc:@field(DOCID+@lit(mcc/082))]
- [Bernardo O'Higgins to the President of the United States, April 1, 1817](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=183) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=183]
- [Convention with Central America](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&Page=774) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&Page=774]

- [Convention with Russia \(1824\)](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=442) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=442]
- [Don Manuel Torres to the Secretary of State \(John Quincy Adams\), November 30, 1821](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=841) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=841]
- [Independence of the Spanish Provinces](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=173) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=173]
- [INDEX TO FOREIGN RELATIONS. VOLUME IV](http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sp0043))) [http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sp0043))]
- [Instructions from Adams to Middleton in Negotiating with Russia, July 22, 1823](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=445) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=445]
- [Jefferson to James Monroe, February 21, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040128))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040128))]
- [Jefferson to James Monroe, June 11, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040132))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040132))]
- [Jefferson to James Monroe, June 23, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040133))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040133))]
- [Jefferson to Monroe on South America, February 4, 1816](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(tj110168))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(tj110168))]
- [John Forsythe to JQ Adams on the Cessation of Florida, September 21, 1820](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=280) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=280]
- [Adams on Greek Revolution, August 18, 1823](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&Page=257) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&Page=257]
- [John Quincy Adams to the Russian Minister to the United States, February 25, 1822](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=861) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=861]
- [Message to Congress: Permission from Monroe to Jackson to Enter Florida, March 25, 1818](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=190) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=190]
- [Monroe to Thomas Jefferson, April 14, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040130))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040130))]
- [Monroe to Thomas Jefferson, August 18, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040135))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040135))]
- [Monroe to Thomas Jefferson, December 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040141))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040141))]
- [Monroe to Thomas Jefferson, December 4, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040140))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040140))]
- [Monroe to Thomas Jefferson, June 2, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040131))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040131))]
- [Monroe to Thomas Jefferson, October 17, 1823](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040137))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040137))]
- [New map of South America from the latest authorities. From Samuel Lewis' Atlas, 1817](http://memory.loc.gov/cgi-bin/query/r?ammem/gmd:@field(NUMBER+@band(g5200+ct000170))) [http://memory.loc.gov/cgi-bin/query/r?ammem/gmd:@field(NUMBER+@band(g5200+ct000170))]
- [New York Citizens Petition of Sympathy for Greece, December 29, 1823](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=260) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=260]
- [Political Condition of the Spanish Provinces of South America \(March and April 1822\) -- Response to the Resolution of January 30, 1822](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=825) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=825]
- [Presenting Colonel Martin Thompson as the authorized deputy or minister of Buenos Ayres, and requesting the protection and assistance of the United States, January 16, 1816](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=174) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=174]
- [President Monroe to Congress: Recognition of the Independent States of South America](http://memory.loc.gov/cgi-bin/ampage?collId=llsj&fileName=011/llsj011.db&recNum=178) [http://memory.loc.gov/cgi-bin/ampage?collId=llsj&fileName=011/llsj011.db&recNum=178]
- [Ratified convention with Russia of April 5, 1824](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=592) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=592]

- [Resolution of the House Passed January 30, 1822](http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(hj01541))) [http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(hj01541))]
- [The Republic of Columbia Declared, February 20, 1821 \(uniting Columbia, Venezuela, and Ecuador\)](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=839) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=839]
- [Thomas Jefferson to James Monroe, October 24, 1823 \(full text\)](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040139))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040139))]
- Journal of the Senate: [THURSDAY, APRIL 25, 1822](http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sj011105))) [http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sj011105))]
- [To Chiefs and Warriors From President, November 28, 1817](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=016/llsp016.db&recNum=693) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=016/llsp016.db&recNum=693]
- PBS American Experience: [Teddy Roosevelt's World View](http://www.pbs.org/wgbh/amex/tr/mccull4.html) [http://www.pbs.org/wgbh/amex/tr/mccull4.html]

#### [The Library of Congress](http://www.loc.gov/) [http://www.loc.gov/]

- [Analysis of Primary Sources](http://rs6.loc.gov/ammem/ndlpedu/lessons/psources/analyze.html) [http://rs6.loc.gov/ammem/ndlpedu/lessons/psources/analyze.html]
- [Using Primary Sources in the Classroom](http://lcweb2.loc.gov/ammem/ndlpedu/lessons/primary.html) [http://lcweb2.loc.gov/ammem/ndlpedu/lessons/primary.html]
- [Chile: A Country Study](http://lcweb2.loc.gov/frd/cs/citoc.html) [http://lcweb2.loc.gov/frd/cs/citoc.html]
- [Columbia: A Country Study](http://lcweb2.loc.gov/frd/cs/cotoc.html) [http://lcweb2.loc.gov/frd/cs/cotoc.html]
- [Peru: A Country Study](http://lcweb2.loc.gov/frd/cs/petoc.html) [http://lcweb2.loc.gov/frd/cs/petoc.html]
- [Venezuela: A Country Study](http://lcweb2.loc.gov/frd/cs/vetoc.html) [http://lcweb2.loc.gov/frd/cs/vetoc.html]
- [The First Great Western Empire](http://www.myloc.gov/Exhibitions/creatingtheus/BillofRights/FormationofPoliticalParties/ExhibitObjects/CelebratingTheFirstGreatWesternEmpire.aspx) [http://www.myloc.gov/Exhibitions/creatingtheus/BillofRights/FormationofPoliticalParties/ExhibitObjects/CelebratingTheFirstGreatWesternEmpire.aspx]

#### The American President:

- [James Monroe](http://millercenter.org/academic/americanpresident/monroe) [http://millercenter.org/academic/americanpresident/monroe]
- [Thomas Jefferson](http://millercenter.org/academic/americanpresident/jefferson) [http://millercenter.org/academic/americanpresident/jefferson]

#### [The James Monroe Museum and Memorial Library](http://www.umw.edu/jamesmonroemuseum/) [http://www.umw.edu/jamesmonroemuseum/]

#### American Studies at the University of Virginia: United States Territorial Maps

- [United States in 1810](http://xroads.virginia.edu/~MAP/TERRITORY/1810map.html) [http://xroads.virginia.edu/~MAP/TERRITORY/1810map.html]
- [United States in 1820](http://xroads.virginia.edu/~MAP/TERRITORY/1820map.html) [http://xroads.virginia.edu/~MAP/TERRITORY/1820map.html]

#### [The Avalon Project](http://avalon.law.yale.edu/) [http://avalon.law.yale.edu/]

- [1812 - Declaration of War With Great Britain](http://avalon.law.yale.edu/19th_century/1812-01.asp) [http://avalon.law.yale.edu/19th\_century/1812-01.asp]
- [Adams-Onis Treaty](http://avalon.law.yale.edu/19th_century/sp1819.asp) [http://avalon.law.yale.edu/19th\_century/sp1819.asp]
- [Annual Messages of the Presidents](http://avalon.law.yale.edu/subject_menus/sou.asp) [http://avalon.law.yale.edu/subject\_menus/sou.asp]
- [The Barbary Treaties](http://avalon.law.yale.edu/19th_century/bar1816t.asp) [http://avalon.law.yale.edu/19th\_century/bar1816t.asp]
- [Convention of 1818 between the United States and Great Britain](http://avalon.law.yale.edu/19th_century/conv1818.asp) [http://avalon.law.yale.edu/19th\_century/conv1818.asp]
- [Convention of Peace, Amity, Commerce, and Navigation, May 16, 1832](http://avalon.law.yale.edu/19th_century/chile01.asp) [http://avalon.law.yale.edu/19th\_century/chile01.asp]
- [Exchange of Notes 1817: Proclamation \(Relative to Naval Forces on the American Lakes\)](http://avalon.law.yale.edu/subject_menus/br1817m.asp) [http://avalon.law.yale.edu/subject\_menus/br1817m.asp]
- [Inaugural Addresses of the Presidents](http://avalon.law.yale.edu/subject_menus/inaug.asp) [http://avalon.law.yale.edu/subject\_menus/inaug.asp]
- [The Jay Treaty of 1794](http://avalon.law.yale.edu/subject_menus/jaymenu.asp) [http://avalon.law.yale.edu/subject\_menus/jaymenu.asp]
- [Louisiana Purchase Treaty](http://avalon.law.yale.edu/subject_menus/fr1803m.asp) [http://avalon.law.yale.edu/subject\_menus/fr1803m.asp]
- [Monroe Doctrine; December 2, 1823](http://avalon.law.yale.edu/19th_century/monroe.asp) [http://avalon.law.yale.edu/19th\_century/monroe.asp]
- [Monroe's Second Inaugural Address](http://avalon.law.yale.edu/19th_century/monroe2.asp) [http://avalon.law.yale.edu/19th\_century/monroe2.asp]
- [Preliminary Articles of Peace](http://avalon.law.yale.edu/18th_century/prel1782.asp) [http://avalon.law.yale.edu/18th\_century/prel1782.asp]
- [The Proclamation of Neutrality 1793](http://avalon.law.yale.edu/18th_century/neutra93.asp) [http://avalon.law.yale.edu/18th\_century/neutra93.asp]
- [The Quasi War with France; 1791-1800](http://avalon.law.yale.edu/subject_menus/quasi.asp) [http://avalon.law.yale.edu/subject\_menus/quasi.asp]
- [Treaty of Ghent](http://avalon.law.yale.edu/19th_century/ghent.asp) [http://avalon.law.yale.edu/19th\_century/ghent.asp]
- [Treaty of San Ildefonso: Retrocession of Louisiana from Spain to France](http://avalon.law.yale.edu/19th_century/ildefens.asp) [http://avalon.law.yale.edu/19th\_century/ildefens.asp]

- [Washington's Farewell Address, 1796](http://avalon.law.yale.edu/18th_century/washing.asp) [http://avalon.law.yale.edu/18th\_century/washing.asp]
- Library of Congress: [Our Documents](http://www.ourdocuments.gov/) [http://www.ourdocuments.gov/]
- [Learn More About the Monroe Doctrine](http://www.ourdocuments.gov/doc.php?doc=23) [http://www.ourdocuments.gov/doc.php?doc=23]
- National Archives: [Digital Classroom](http://www.archives.gov/digital_classroom/index.html) [http://www.archives.gov/digital\_classroom/index.html]
- [Cartoon Analysis Worksheet](http://www.archives.gov/education/lessons/worksheets/cartoon_analysis_worksheet.pdf) [http://www.archives.gov/education/lessons/worksheets/cartoon\_analysis\_worksheet.pdf]
  - [Document Analysis Worksheets](http://www.archives.gov/education/lessons/worksheets/written_document_analysis_worksheet.pdf) [http://www.archives.gov/education/lessons/worksheets/written\_document\_analysis\_worksheet.pdf]
- [Digital History](http://www.digitalhistory.uh.edu/) [http://www.digitalhistory.uh.edu/]
- [Conquering Space \(Westward Expansion\)](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=572) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=572]
  - [Defending American Interests in Foreign Affairs](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=573) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=573]
  - [The Eagle, the Tiger, and the Shark](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=18) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=18]
  - [Embargo of 1807](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=19) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=19]
  - [The Growth of American Nationalism](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=567) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=567]
  - [The Louisiana Purchase](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=16) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=16]
  - [The Presidency of John Adams](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=10) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=10]
  - [A Second War of Independence](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=20) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=20]
  - [The War's Significance](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=22) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=22]
  - [Years of Crisis](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=8) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=8]
- [United States Department of State](http://www.state.gov/) [http://www.state.gov/]
- [Foreign Relations of the United States](http://www.state.gov/r/pa/ho/frus/) [http://www.state.gov/r/pa/ho/frus/]
  - [John Jay's Treaty](http://www.state.gov/r/pa/ho/time/nr/14318.htm) [http://www.state.gov/r/pa/ho/time/nr/14318.htm]
  - [Monroe Doctrine](http://www.state.gov/r/pa/ho/time/jd/16321.htm) [http://www.state.gov/r/pa/ho/time/jd/16321.htm]
  - [Washington's Farewell Address](http://www.state.gov/r/pa/ho/time/nr/14319.htm) [http://www.state.gov/r/pa/ho/time/nr/14319.htm]
- [University of Virginia Electronic Text Center](http://etext.lib.virginia.edu/) [http://etext.lib.virginia.edu/]
- [Independence of SPANISH AMERICA: 1820](http://etext.lib.virginia.edu/etcbin/foley-section?id=JCE8019) [http://etext.lib.virginia.edu/etcbin/foley-section?id=JCE8019]
  - [James Monroe to Thomas Jefferson, October 17, 1823](http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=7062376&textreg=1&query=monroe+doctrine) [http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=7062376&textreg=1&query=monroe+doctrine]
  - [Letter from Jefferson To General Horatio Gates, July 1803](http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=6369469&tag=5480.+MONROE+(James),+Louisiana+purchase.+--+&query=monroe&id=JCE5480) [http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=6369469&tag=5480.+MONROE+(James),+Louisiana+purchase.+--+&query=monroe&id=JCE5480]
  - [Revolt In South America](http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=9006069&tag=8019.+SOUTH+AMERICA,+Revolt+in.+--+&query=south+america&id=JCE8019) [http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=9006069&tag=8019.+SOUTH+AMERICA,+Revolt+in.+--+&query=south+america&id=JCE8019]
  - [Thomas Jefferson Digital Archive](http://etext.lib.virginia.edu/jefferson/bibliog/) [http://etext.lib.virginia.edu/jefferson/bibliog/]
  - [Thomas Jefferson on the Monroe Doctrine](http://etext.lib.virginia.edu/etcbin/foleyx-browse?id=Monroe%20Doctrine) [http://etext.lib.virginia.edu/etcbin/foleyx-browse?id=Monroe%20Doctrine]
  - [To John C. Breckinridge Monticello, August 12, 1803](http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6224382&textreg=1&query=Louisiana) [http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6224382&textreg=1&query=Louisiana]
  - [To the Special Envoy to France \(JAMES MONROE\) Washington, January 13, 1803](http://etext.lib.virginia.edu/etcbin/toccer-) [http://etext.lib.virginia.edu/etcbin/toccer-

new2?id=JefLett.sgm&images=images/modeng&data=/texts/english/modeng/parsed&tag=public&=148&division=div1]

- [To the U.S. Minister to France \(ROBERT R. LIVINGSTON\) Washington, April 18, 1802](http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6142763&textreg=1&query=Louisiana)  
[http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6142763&textreg=1&query=Louisiana]

[David Rumsey Map Collections](http://www.davidrumsey.com) [http://www.davidrumsey.com]

- [Europe Map 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~17~10079:Europe)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~17~10079:Europe]
- [South America Map 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~99~10161:South-America--Engraved-by-J--Yeage)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~99~10161:South-America--Engraved-by-J--Yeage]
- [North America/Gulf of Mexico 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~4404~350013:Map-of-North-America-from-20-to-80-)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~4404~350013:Map-of-North-America-from-20-to-80-]
- [Mexico 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~77~10139:Mexico--B-T--Welch-&Co--Sc--Publis?qvq=mgid:1823&mi=72&trs=135)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~77~10139:Mexico--B-T--Welch-&Co--Sc--Publis?qvq=mgid:1823&mi=72&trs=135]
- [West Indies \(Caribbean\) 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~78~10140:West-Indies--?qvq=mgid:1823&mi=73&trs=135)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~78~10140:West-Indies--?qvq=mgid:1823&mi=73&trs=135]
- [North & Central America 1823](http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~1362~100130:A-Map-of-North-America,-Constructed?qvq=mgid:1823&mi=121&trs=135)  
[http://www.davidrumsey.com/luna/servlet/detail/RUMSEY~8~1~1362~100130:A-Map-of-North-America,-Constructed?qvq=mgid:1823&mi=121&trs=135]

Naval Historical Center: [Instances of Use of United States Forces Abroad, 1798 - 1993](http://www.history.navy.mil/wars/foabroad.htm)  
[http://www.history.navy.mil/wars/foabroad.htm]

USInfo.org (Basic Readings in US Democracy): [Monroe Doctrine 1823](http://usinfo.org/docs/democracy/50.htm)  
[http://usinfo.org/docs/democracy/50.htm]

[Documents of World War I](http://www.mtholyoke.edu/acad/intrel/ww1.htm) [http://www.mtholyoke.edu/acad/intrel/ww1.htm]

- [Documents Relating to American Foreign Policy](http://www.mtholyoke.edu/acad/intrel/pre1898.htm)  
[http://www.mtholyoke.edu/acad/intrel/pre1898.htm]
  - [John Quincy Adams's Account of the Cabinet Meeting of November 7, 1823](http://www.mtholyoke.edu/acad/intrel/jqacab.htm)  
[http://www.mtholyoke.edu/acad/intrel/jqacab.htm]
  - [Warning Against the Search for Monsters to Destroy](http://www.mtholyoke.edu/acad/intrel/jqadams.htm)  
[http://www.mtholyoke.edu/acad/intrel/jqadams.htm]
  - [HENRY CABOT LODGE: Corollary to the Monroe Doctrine \(Source: Record, 62 Cong., 2 Sess., p. 10045.\)](http://www.mtholyoke.edu/acad/intrel/lodge2.htm) [http://www.mtholyoke.edu/acad/intrel/lodge2.htm]
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# The Monroe Doctrine: U.S. Foreign Affairs (circa 1782-1823) and James Monroe

**Lesson One of the Curriculum Unit:** The Monroe Doctrine: Origin and Early American Foreign Policy

## Guiding Questions

- What was the Monroe Doctrine? What principles of foreign policy did this Doctrine establish?
- What were the significant events in U.S. diplomacy before 1823?
- What diplomatic roles had James Monroe played before he became president?
- Who were the key figures in U.S. diplomacy before 1823? What did each do?
- Which events were connected to peace and safety concerns for the United States?
- What factors led the United States to engage in diplomatic exchanges with other countries?
- Which events touched on American sympathy for revolutionary movements?
- Which events related to the expansion of the United States?

## Learning Objectives

After completing this lesson, students will be able to:

- Create a timeline of significant events in U.S. foreign affairs before 1823.
- Cite the roles played by James Monroe and his contributions to U.S. diplomacy before he became president.
- Make connections between diplomatic events and revolutionary movements, concerns over U.S. peace and safety, and U.S. expansion.

An entry from InfoUSA, [The Monroe Doctrine \(1823\)](#), states:

*In Monroe's message to Congress on December 2, 1823, he delivered what we have always called the Monroe Doctrine, although in truth it should have been called the Adams Doctrine.*

The writer expresses the opinion that the Monroe Doctrine should have been named after John Quincy Adams to honor his role in its formulation. Additional evidence indicates that former President Thomas Jefferson strongly influenced President Monroe. Tell students that, in this series of lessons, they will decide for themselves if the famous Doctrine has been correctly or incorrectly named. This question—which is interesting but far from central—provides the environment for a closer look at the Monroe Doctrine and the circumstances leading to it.

## A Glance at the Monroe Doctrine

In Lesson Three and Lesson Four students will do a close reading of the text of the Monroe Doctrine (1823). Here, a careful examination of the document anticipates what is to come. Share a copy of the [Monroe Doctrine](#) (from the Avalon Project) with the class. Ask the students to read the document, list the key points, then discuss its central tenets (noted below):

*The American continents, by the free and independent condition which they have assumed and maintain, are henceforth not to be considered as subjects for future colonization by any European powers....*

*...declare that we should consider any attempt on their part to extend their system to any portion of this hemisphere as dangerous to our peace and safety.*

*Our policy in regard to Europe... remains the same, which is, not to interfere in the internal concerns of any of its powers...*

Encourage your students to analyze and evaluate the Monroe Doctrine. Who do they think Monroe was addressing these comment to? Why might he have felt the need to make these statements? What is he "warning" against? Among the questions they should address is whether the United States was militarily strong enough to enforce its position and, if not, why the president might have felt confident in issuing the Doctrine. When your class has completed the survey of American foreign policy, outlined below, you might bring the students back to these questions in order to re-evaluate their initial positions.

When they have completed their initial analysis of the text of the Monroe Doctrine, ask students to scan the entire text looking for names of countries and continents. They may also find indications of unspecified countries [for example, "But with the Governments who have declared their independence and maintain it.." and a reference to the "allied powers"]. The class should compile a complete list. If desired, students can look at maps of Europe and Central and South America in 1823 [links are provided above – see the David Rumsey Map Collection]. Students can zoom in and out of the maps using the online browser (you can also export these maps as pdfs).

The next step in this lesson will be to review the events in American foreign relations and international diplomacy leading up to the Monroe Doctrine to better understand the relationship between the text of the Doctrine and the countries and continents Monroe mentions. The students also will focus on several important discussion questions.

### **A Documentary Crash Course in American Foreign Relations before the Monroe Doctrine**

To achieve a better understanding of the Monroe Doctrine, students need to review American diplomacy prior to the Doctrine's formulation. The handout "Documentary Timeline: American Diplomacy before the Monroe Doctrine" (pages 2-6 of the Monroe Doctrine Resource Materials that follow this lesson) provides a capsule review of early American diplomacy and related events. How the handout will be used will differ from class to class (some suggestions are provided below), depending largely on the background students bring to the lesson and the available time. However, the goal is to provide the conditions for a discussion of the following questions:

- Prior to adoption of the Monroe Doctrine, how would you characterize U.S. relations with the countries named in the document?
- In what ways was Monroe involved with key diplomatic events prior to his inauguration in 1817?
- What threats to American peace and safety occurred before 1823?
- What events or circumstances may have led Monroe or his Secretary of State John Quincy Adams to want to protect the newly independent Latin American states?
- What evidence suggests that Monroe/Adams had expansionist intentions for the United States in the Western Hemisphere? Which events or circumstances may have contributed to the need or desire for expansion?
- What is the central thesis of the Monroe Doctrine?
- What connection, if any, exists between events on the timeline and the central thesis of the Monroe Doctrine?
- What other events or circumstances, if any, should have been included in the timeline?

The handout provides a list of events from 1782 to 1823. Though not comprehensive, it attempts instead to highlight the major events. It offers URLs for brief secondary accounts and primary documents and a selection of quotes from some of each. If desired, use the timeline as a guideline for lecture and/or discussion. You can create a graphic organizer that students can use to record notes about the key years. Alternatively, the class can review the entire timeline or relevant portions of it without reference to the full online documents. Student groups or individuals also can be assigned a few primary documents to review and then select one or two especially pertinent excerpts. If desired, students can use the "Written Document Analysis Worksheet" in the lesson materials.

Student groups or individuals can be assigned specific years (or a particular decade) in an attempt to share with the class the significant events from those years. The teacher can use the timeline as the basis for a lecture or a handout custom-made for the needs of the class. Students can use the timeline as the basis for their own timeline(s) of significant events

### **Assessment**

Students should be able to respond effectively to the bulleted discussion questions above. To assess how much they have learned from this lesson, ask students, working in small groups or individually, to complete the following statement in one paragraph or less:

*The history of American foreign relations before 1823 could be characterized as...*

If desired, students can expand their ideas into brief essays beginning with the opening statement above and then marshaling evidence to support their positions. When they have completed their evaluation of American foreign policy prior to 1823, return to the question of whether the United States had the power to enforce the Monroe Doctrine against the great powers of Europe.

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# The Monroe Doctrine: President Monroe and the Independence Movement in South America

**Lesson Two of the Curriculum Unit:** The Monroe Doctrine: Origin and Early American Foreign Policy

## Guiding Questions

- How did conditions in Europe relate to the independence movements in South America?
- What reasons did President Monroe give for recognizing the independence movements in South America?

## Learning Objectives

After completing this lesson, students will be able to:

- Name some of the present-day countries where independence movements began in the first quarter of the nineteenth century.
- List the reasons President Monroe gave Congress for recognizing certain independence movements in South America.
- Make connections between Monroe's recognition of the independent states of South America and earlier diplomatic events.
- Take a stand, with support, on what was the key motivation behind Monroe's recognition of the independent states of South America.

## Background on the Monroe Doctrine

In his December 2, 1823, address to Congress, President James Monroe articulated U.S. policy on the new political order developing in the rest of the Americas and the role of Europe in the Western Hemisphere. The statement, known as the [Monroe Doctrine](#), was little noted by the Great Powers of Europe, but eventually became a longstanding tenet of U.S. foreign policy.

Monroe and his Secretary of State, John Quincy Adams, drew upon a foundation of American diplomatic ideals such as disentanglement from European affairs and defense of neutral rights as expressed in [Washington's Farewell Address](#) and Madison's stated rationale for waging the [War of 1812](#). The three main concepts of the Doctrine—separate spheres of influence for the Americas and Europe, noncolonization, and nonintervention—were designed to signify a clear break between the New World and the autocratic realm of Europe. Monroe's administration forewarned the imperial European powers against interfering in the affairs of the newly independent Latin American states or current and future U.S. territories. While Americans generally objected to European colonies in the New World, they also desired to increase U.S. influence and trading ties throughout the region to their south. European mercantilism posed the greatest obstacle to economic expansion. In particular, Americans feared that Spain and France might reassert colonialism over the Latin American peoples who had just overthrown European rule in the wake of the chaos occurring in Europe in the early 19<sup>th</sup> century. Signs that Russia was expanding its presence southward from Alaska toward the Oregon Territory also were disconcerting.

For their part, the British also had a strong interest in ensuring the demise of Spanish colonialism, with all the trade restrictions mercantilism imposed. Earlier in 1823 British Foreign Minister George Canning suggested to Americans that the two nations issue a joint declaration to deter any other power from intervening in Central and South America. Secretary of State John Quincy Adams, however, vigorously opposed cooperation with Great Britain, contending that a statement of bilateral nature could limit U.S. expansion in the future. He also argued that the British were not committed to recognizing the Latin

American republics and must have had imperial motivations themselves to suggest such a bilateral agreement.

The essay [Defending American Interests in Foreign Affairs](#) on the Digital History offers this:

The critical foreign policy issue facing the United States after the War of 1812 was the fate of Spain's crumbling New World empire. Many of Spain's New World colonies had taken advantage of turmoil in Europe during the Napoleonic Wars to fight for their independence. These revolutions aroused intense sympathy in the United States, but many Americans feared that European powers might restore monarchical order in Spain's New World.

The leaders of the revolts exploited and were inspired by their connections to the American Revolution, despite the many differences between their movements and the movement that established the United States. To increase their legitimacy, the revolutionary leaders of South America sought U.S. recognition, as documents offered in this lesson reveal. President Monroe also attempted to exploit the relationship of the United States to the revolutionary struggles, encouraging "the popular perception of Simon Bolivar of Colombia as the George Washington of Latin America" (from [James Monroe: Foreign Affairs](#)).

### **Class Activity**

Share with the class the annotated excerpts from "Monroe on Recognition of the Independent States of South America" on pages 7-8 of the Monroe Doctrine Resource Materials that follow these lessons. Or, if desired, use the full text of [President Monroe to Congress: Recognition of the Independent States of South America](#), available on the Library of Congress American Memory website.

As a guide to your discussion, have the students answer the "Questions to Accompany President Monroe's Message on Recognition" on page 9 of the Monroe Doctrine Resource Materials that follow these lessons.

### **Assessment**

Students should be able to respond effectively, either in writing or class discussion, to the following questions:

- How did conditions in Europe relate to the independence movements in South America?
- What reasons did President Monroe give for recognizing the independence movements in South America?

### **Extending the Lesson: Revolutionary Movements in South America, Primary and Secondary Sources**

Students interested in extending this lesson can read some primary documents and secondary accounts of the revolutionary movements in South America. They can begin their study of any country listed below with a primary document and a brief secondary account (from the [Library of Congress Country Studies](#)).

Students should come to a better understanding of the following:

- The connection between independence movements in South America and relations between European countries.
- The resemblance and differences between the independence movements of South America and the struggle for independence in the United States.
- The intent of the primary document. Which of the following applies? Based on what evidence? Are there other intentions?
  - To gain legitimacy for the independence movement.
  - To gain momentum and support for a movement that has not yet achieved its goals.
  - To establish diplomatic relations with other countries.
  - To formalize independent status.
  - To elicit empathy in comparison to America's struggle for independence.

NOTE: Students may encounter the Spanish word "criollo" (English: creole). The *criollos* were of mixed parentage—European and Indigenous North or South American. Though many *criollos* had achieved relative prosperity and power in their respective countries, they resented their inability to achieve full power or recognition due to racism and/or the entrenched power structure.

### Historical Reference Maps of Central and South America:

[1815 Central and South America](http://www.geographicus.com/P/AntiqueMap/America-t-1815) [http://www.geographicus.com/P/AntiqueMap/America-t-1815]  
[1823 Latin America States](http://etc.usf.edu/maps/pages/3200/3293/3293.htm) [http://etc.usf.edu/maps/pages/3200/3293/3293.htm]  
[1823 South America](http://www.davidrumsey.com/maps6161.html) [http://www.davidrumsey.com/maps6161.html]  
[1823 North America](http://www.davidrumsey.com/maps1820.html) [http://www.davidrumsey.com/maps1820.html]  
[1860 Central America](http://www.nationmaster.com/encyclopedia/Image:CentralAmerica1860Map.jpg) [http://www.nationmaster.com/encyclopedia/Image:CentralAmerica1860Map.jpg]  
[1897 South America](http://etc.usf.edu/maps/pages/2600/2648/2648.htm) [http://etc.usf.edu/maps/pages/2600/2648/2648.htm]

### Mexico:

*Early Discontent:* Economic expansion and a certain degree of political relaxation in the 1700s gave rise to greater expectations of autonomy by the colonists, especially after the republican revolutions in the United States (1776), France (1789), and Haiti (1804). Social stratification in New Spain, marked by discrepancies between the rich and the poor and between *criollos* and *peninsulares*, however, worked to prevent the necessary social cohesion for a revolutionary undertaking, even though the tensions for a revolution continued to build. *Peninsulares* from all walks of life believed themselves superior to their American-born counterparts. In reaction to such discrimination, *criollos* showed pride in things that pertained to Mexico. *Criollos* considered themselves subjects of the Spanish crown, however, and also abided by the doctrines of the Roman Catholic Church. More important, *criollos* did not want an egalitarian society—privileges were fine as long as they benefited from them.

In Europe, Napoleon Bonaparte invaded the Iberian Peninsula in 1808. When French troops entered Madrid, the Habsburg king, Charles IV, abdicated, and Napoleon named his brother Joseph Bonaparte as the new king. Many Spanish patriots in unoccupied parts of Spain declared Ferdinand VII, son of Charles IV, as the new monarch. When the news of Charles IV's abdication reached New Spain, considerable turmoil arose over the question of whether Ferdinand VII or Joseph was the legitimate ruler of the colony. Hoping to be named king of a newly independent country, Viceroy José de Iturrigaray supported the *criollos* of New Spain when they proposed a junta to govern the colony. *Peninsulares* realized the danger of such an association between *criollos* and the administration and thus orchestrated a coup d'état in 1808 to defend their privileges and standing in colonial society. After the coup, Iturrigaray was replaced by a senile puppet Spaniard, Pedro Garibay, much to the despair of the *criollos*.

*Wars of Independence, 1810-21:* The eleven-year period of civil war that marked the Mexican wars of independence was largely a byproduct of the crisis and breakdown of Spanish royal political authority throughout the American colonies. A successful independence movement in the United States had demonstrated the feasibility of a republican alternative to the European crown. For most politically articulate *criollos*, however, a strong cultural affinity with the mother country, a preference for stability and continuity, and alienation from Mexico's native and poor mestizo populations were significant disincentives to a radical break with the established order. Dissatisfaction with *peninsular* administrative practices and anti-criollo discrimination at many levels of the colonial government and society were important foci of discontent, but beyond small pockets of radical conspirators, these grievances had not yet spawned a pronounced wave of proindependence *criollo* sentiment at the beginning of the nineteenth century.

The French occupation of Spain and the overthrow of the Iturrigaray junta created a vacuum of legitimacy, as it was no longer clear that the ad hoc *peninsular* administration represented any authority or interests other than its own. A revolt would no longer necessarily be a challenge to the paternal crown and the faith that it ostensibly defended, but would instead shake off the rule of the increasingly despised *gachupines*, as the *peninsulares* were derisively called. It was in this context that a radical *criollo* parish

priest, Miguel Hidalgo y Costilla, was able to lead the first truly widespread insurrection for Mexican independence.

*Hidalgo and Morelos:* Soon after being named parish priest in the small town of Dolores, Hidalgo began to promote the establishment of various small manufacturing concerns. He realized the need for diversification of industrial activities in an area that had the mines of Guanajuato as its major business. At the same time, during his seven years at Dolores, Hidalgo promoted discussion groups at his house, where Indians, mestizos, criollos, and *peninsulares* were welcomed. The themes of these discussions were current events, to which Hidalgo added his own input of social and economic concerns. The independence movement was born out of these informal discussions and was directed against Spanish domination of political and economic life in New Spain. December 8, 1810, was set for the beginning of the uprising.

The plans were disclosed to the central government, and the conspirators were alerted that orders had been sent for their arrest. Pressed by this new development, on September 16, 1810, Hidalgo decided to strike out for independence without delay (this date is celebrated as Mexico's independence day). The church bells summoned the people, and Hidalgo asked them to join him against the Spanish government and the *peninsulares* in the famous Grito de Dolores (Cry of Dolores): "Long live Our Lady of Guadalupe! Death to bad government! Death to the *gachupines*!" The crowd responded enthusiastically, and soon an angry mob was marching toward the regional capital of Guanajuato. The miners of Guanajuato joined with the native workers of Dolores in the massacre of all *peninsulares* who resisted them, including the local *intendente*.

From Guanajuato, the independence forces marched on to Mexico City after having captured Zacatecas, San Luis Potosí, and Valladolid. On October 30, 1810, they encountered resistance at Monte de las Cruces and, despite a rebel victory, lost momentum and did not take Mexico City. After a few more victories, the revolutionary forces moved north toward Texas. In March of the following year, the insurgents were ambushed and taken prisoner in Monclova (in the present-day state of Coahuila). Hidalgo was tried as a priest by the Holy Office of the Inquisition and found guilty of heresy and treason. He was later condemned to death. On July 31, 1811, Hidalgo was executed by firing squad. His body was mutilated, and his head was displayed in Guanajuato as a warning to other would-be insurgents. After the death of Hidalgo, José María Morelos Pavón assumed the leadership of the revolutionary movement. Morelos took charge of the political and military aspects of the insurrection and further planned a strategic move to encircle Mexico City and to cut communications to the coastal areas. In June 1813, Morelos convoked a national congress of representatives from all of the provinces, which met at Chilpancingo in the present-day state of Guerrero to discuss the future of Mexico as an independent nation. The major points included in the document prepared by the congress were popular sovereignty, universal male suffrage, the adoption of Roman Catholicism as the official religion, abolition of slavery and forced labor, an end to government monopolies, and an end to corporal punishment. Despite initial successes by Morelos's forces, however, the colonial authorities broke the siege of Mexico City after six months, captured positions in the surrounding areas, and finally invaded Chilpancingo. In 1815 Morelos was captured and met the same fate as Hidalgo.

From 1815 to 1821, most of the fighting by those seeking independence from Spain was done by isolated guerrilla bands. Out of these bands rose two men, Guadalupe Victoria (whose real name was Manuel Félix Fernández) in Puebla and Vicente Guerrero in Oaxaca, both of whom were able to command allegiance and respect from their followers. The Spanish viceroy, however, felt the situation was under control and issued a general pardon to every rebel who would lay down his arms. After ten years of civil war and the death of two of its founders, by early 1820 the independence movement was stalemated and close to collapse. The rebels faced stiff Spanish military resistance and the apathy of many of the most influential criollos. The violent excesses and populist zeal of Hidalgo's and Morelos's irregular armies had reinforced many criollos' fears of race and class warfare, ensuring their grudging acquiescence to conservative Spanish rule until a less bloody path to independence could be found. It was at this juncture that the machinations of a conservative military caudillo coinciding with a successful liberal rebellion in Spain, made possible a radical realignment of the proindependence forces.

*Iturbide and the Plan of Iguala:* In what was supposed to be the final government campaign against the insurgents, in December 1820, Viceroy Juan Ruiz de Apodaca sent a force led by a royalist criollo officer, Agustín de Iturbide, to defeat Guerrero's army in Oaxaca. Iturbide, a native of Valladolid, had gained renown for the zeal with which he persecuted Hidalgo's and Morelos's rebels during the early independence struggle. A favorite of the Mexican church hierarchy, Iturbide was the personification of conservative criollo values, devoutly religious, and committed to the defense of property rights and social privileges; he was also disgruntled at his lack of promotion and wealth.

Iturbide's assignment to the Oaxaca expedition coincided with a successful military coup in Spain against the new monarchy of Ferdinand VII. The coup leaders, who had been assembled as an expeditionary force to suppress the American independence movements, compelled a reluctant Ferdinand to sign the liberal Spanish constitution of 1812. When news of the liberal charter reached Mexico, Iturbide saw in it both a threat to the status quo and an opportunity for the criollos to gain control of Mexico. Ironically, independence was finally achieved when conservative forces in the colonies chose to rise up against a temporarily liberal regime in the mother country. After an initial clash with Guerrero's forces, Iturbide switched allegiances and invited the rebel leader to meet and discuss principles of a renewed independence struggle.

While stationed in the town of Iguala, Iturbide proclaimed three principles, or "guarantees," for Mexican independence from Spain: Mexico would be an independent monarchy governed by a transplanted King Ferdinand or some other conservative European prince, criollos and *peninsulares* would henceforth enjoy equal rights and privileges, and the Roman Catholic Church would retain its privileges and religious monopoly. After convincing his troops to accept the principles, which were promulgated on February 24, 1821, as the Plan of Iguala, Iturbide persuaded Guerrero to join his forces in support of the new conservative manifestation of the independence movement. A new army, the Army of the Three Guarantees, was then placed under Iturbide's command to enforce the Plan of Iguala. The plan was so broadly based that it pleased both patriots and loyalists. The goal of independence and the protection of Roman Catholicism brought together all factions.

Iturbide's army was joined by rebel forces from all over Mexico. When the rebels' victory became certain, the viceroy resigned. On September 27, 1821, representatives of the Spanish crown and Iturbide signed the Treaty of Córdoba, which recognized Mexican independence under the terms of the Plan of Iguala. Iturbide, a former royalist who had become the paladin for Mexican independence, included a special clause in the treaty that left open the possibility for a criollo monarch to be appointed by a Mexican congress if no suitable member of the European royalty would accept the Mexican crown.

### **Argentina:**

A prelude to Argentine independence was the British attack on Buenos Aires. Admiral Sir Home Popham and Gen. William Carr Beresford took the city in 1806 after the Spanish viceroy fled. An Argentine militia force under Jacques de Liniers ended the British occupation and beat off a renewed attack under Gen. John Whitelocke in 1807.

On May 25, 1810 (May 25 is the Argentine national holiday), revolutionists, acting nominally in favor of the Bourbons dethroned by Napoleon (see Spain), deposed the viceroy and the government was controlled by a junta. The result was war against the royalists. The patriots under Manuel Belgrano won (1812) a victory at Tucumán. On July 9, 1816, a congress in Tucumán proclaimed the independence of the United Provinces of the Río de La Plata. Other patriot generals were Mariano Moreno, Juan Martín de Pueyrredón, and José de San Martín.

Uruguay and Paraguay went their own ways despite hopes of reunion. In Argentina, a struggle ensued between those who wanted to unify the country and those who did not want to be dominated by Buenos Aires. Independence was followed by virtually permanent civil war, with many coups by regional, social, or political factions. Rule by the strong man, the *caudillo*, alternated with periods of democratic rule, too often beset by disorder.

Anarchy was not ended by the election of Bernardino Rivadavia in 1826. The unitarians, who favored a centralized government dominated by Buenos Aires, were opposed to the federalists, who resented the oligarchy of Buenos Aires and were backed by autocratic *caudillos* with gaucho troops. The unitarians triumphed temporarily when Argentinians combined to help the Uruguayans repel Brazilian conquerors in the battle of Ituzaingó (1827), which led to the independence of Uruguay. The internal conflict was, however, soon resumed and was not even quelled when Gen. Juan Manuel de Rosas, the most notorious *caudillo*, established a dictatorship that lasted from 1835 to 1852.

Primary document: [Presenting Colonel Martin Thompson as the authorized deputy or minister of Buenos Ayres, and requesting the protection and assistance of the United States, 1816, January 16](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=174)  
[<http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=174>]

## Chile:

Aristocratic Chileans began considering independence only when the authority and legitimacy of the crown were cast in doubt by Napoleon Bonaparte's invasion of Spain in 1807. Napoleon replaced the Spanish king with his brother, Joseph Bonaparte. On the peninsula, Spanish loyalists formed juntas that claimed they would govern both the motherland and the colonies until the rightful king was restored. Thus, Chileans, like other Spanish Americans, had to confront the dilemma of who was in charge in the absence of the divine monarch: the French pretender to the throne, the Spanish rebels, or local leaders.

The latter option was tried on September 18, 1810, a date whose anniversary is celebrated as Chile's independence day. On that day, the *criollo* leaders of Santiago, employing the town council as a junta, announced their intention to govern the colony until the king was reinstated. They swore loyalty to the ousted Spanish monarch, Ferdinand VII, but insisted that they had as much right to rule in the meantime as did subjects of the crown in Spain itself. They immediately opened the ports to all traders.

Chile's first experiment with self-government, the Old Fatherland (Patria Vieja, 1810-14), was led by José Miguel Carrera Verdugo (president, 1812-13), an aristocrat in his mid-twenties. The military-educated Carrera was a heavy-handed ruler who aroused widespread opposition. One of the earliest advocates of full independence, Bernardo O'Higgins Riquelme, captained a rival faction that plunged the *criollos* into civil war. For him and for certain other members of the Chilean elite, the initiative for temporary self-rule quickly escalated into a campaign for permanent independence, although other *criollos* remained loyal to Spain. Among those favoring independence, conservatives fought with liberals over the degree to which French revolutionary ideas would be incorporated into the movement. After several efforts, Spanish troops from Peru took advantage of the internecine strife to reconquer Chile in 1814, when they reasserted control by winning the Battle of Rancagua on October 12. O'Higgins and many of the Chilean rebels escaped to Argentina.

During the Reconquest (La Reconquista) of 1814-17, the harsh rule of the Spanish loyalists, who punished suspected rebels, drove more Chileans into the insurrectionary camp. More and more members of the Chilean elite were becoming convinced of the necessity of full independence, regardless of who sat on the throne of Spain. As the leader of guerrilla raids against the Spaniards, Manuel Rodríguez became a national symbol of resistance.

When *criollos* sang the praises of equality and freedom, however, they meant equal treatment for themselves in relation to the *peninsulares* and liberation from Spanish rule, not equality or freedom for the masses of Chileans. The *criollos* wanted to assume leadership positions previously controlled by *peninsulares* without upsetting the existing social and economic order. In that sense, the struggle for independence was a war within the upper class, although the majority of troops on both sides consisted of conscripted *mestizos* and native Americans.

In exile in Argentina, O'Higgins joined forces with José de San Martín, whose army freed Chile with a daring assault over the Andes in 1817, defeating the Spaniards at the Battle of Chacabuco on February 12. San Martín considered the liberation of Chile a strategic stepping-stone to the emancipation of Peru, which he saw as the key to hemispheric victory over the Spanish. Chile won its formal independence

when San Martín defeated the last large Spanish force on Chilean soil at the Battle of Maipú on April 5, 1818. San Martín then led his Argentine and Chilean followers north to liberate Peru; and fighting continued in Chile's southern provinces, the bastion of the royalists, until 1826.

Primary document: [Bernardo O'Higgins to the President of the United States](#) (April 1817).

### **Colombia:**

Throughout the colonial period, events in Spain affected the political, economic, and intellectual state of the colonies. One such event was the ascension of the Bourbons to the Spanish throne in 1700. Beginning with Philip of Anjou, now known as King Philip V (reigned 1700-46), the Bourbon kings placed themselves in more direct control of their colonies. In 1717 Philip V established the Viceroyalty of New Granada (present-day Venezuela, Colombia, Panama, and Ecuador), and in 1739 Bogotá became its capital. Excessive and increasing taxation in the late 1700s contributed to the discontent of the *criollos* with the Spanish administration, which manifested itself in the Comunero Revolt of 1781, the most serious revolt against Spanish authority before the war for independence. The rebels had not sought independence from Spain, but their revolt against the king's administration and administrators was not far removed from a fight for independence.

In the late 1700s, the Enlightenment served as a second major influence in the struggle for independence. After the Comunero Revolt, the outlook of the local upper-class and middle-class *criollos* changed as the ideas of the Enlightenment strengthened their desire to control their own destiny. The North American and French revolutions also contributed intellectual foundations for a new society, as well as examples of the possibilities for change.

Leaders in the various localities that had formed *criollo* councils sought to unite the colony of New Granada. From the beginning of their attempts, however, conflict emerged over the form the new government should take. The provincial councils did not want the centralist, authoritarian type of government advocated by the Bogotá council, preferring a federal type of government more in keeping with the liberal principles of the Enlightenment and the example of the North American revolution. To avoid a civil war between the two factions, the provincial councils sent representatives to Bogotá in 1811 to draft a constitution for the territory. In November 1811, a congress was installed, and the provinces formed the United Provinces of New Granada.

Starting in 1812, individual provinces began declaring absolute independence from Spain. That year, Simón Bolívar Palacio, considered the liberator of South America, tried for the first time to gain independence for New Granada, but was unsuccessful. The Spanish reconquest in 1816 installed a military regime that ruled with violent repression. Rising discontent contributed to a greater radicalization of the independence movement, spreading to sectors of the society, such as the lower classes and slaves, that had not supported the previous attempt at independence. At the end of 1816, Bolívar returned to New Granada, convinced that the war for independence was winnable only with the support of the masses. In the earlier attempt at independence, large segments of the population had been lured to the royalist side by promises such as repartition of land and abolition of slavery. When the masses saw that the promises were unfulfilled, however, they changed their allegiance from Spain to the independence movement.

Two significant military encounters led to the movement's success. After having won a number of victories in a drive from the present-day Venezuelan coast to present-day eastern Colombia via the Río Orinoco, Bolívar gave Francisco de Paula Santander the mission of liberating the Casanare region, where he defeated royalist forces in April 1819. After the decisive defeat of royalist forces at the Battle of Boyacá in August 1819, independence forces entered Bogotá without resistance.

The merchants and landowners who fought against Spain now held political, economic, and social control over the new country that encompassed present-day Venezuelan, Colombia, and Panama. The first economic reforms that they passed consolidated their position by liberalizing trade, thereby allowing merchandise from Britain (New Granada's major trading partner after Spain) freer entry into the area.

Primary document: [The Republic of Colombia Declared](#), uniting Columbia, Venezuela, and Ecuador (February 20, 1821).

### **Peru:**

Despite indigenous rebellions in the late 1700s, independence was slow to develop in the Viceroyalty of Peru. For one thing, Peru was a conservative, royalist stronghold where the potentially restless creole elites maintained a relatively privileged, if dependent, position in the old colonial system. At the same time, the "anti-white" manifestations of the Túpac Amaru revolt demonstrated that the indigenous masses could not easily be mobilized without posing a threat to the creole caste itself. Thus, when independence finally did come in 1824, it was largely a foreign imposition rather than a truly popular, indigenous, and nationalist movement. As historian David P. Werlich has aptly put it, "Peru's role in the drama of Latin American independence was largely that of an interested spectator until the final act."

What the spectator witnessed prior to 1820 was a civil war in the Americas that pitted dissident creole elites in favor of independence against royalists loyal to the crown and the old colonial order. The movement had erupted in reaction to Napoleon Bonaparte's invasion of Spain in 1808, which deposed Ferdinand VII and placed a usurper, Joseph Bonaparte, on the Spanish throne. In America this raised the question of the very political legitimacy of the colonial government. When juntas arose in favor of the captive Ferdinand in various South American capitals (except in Peru) the following year, even though of relatively short duration, they touched off a process toward eventual separation that ebbed and flowed throughout the continent over the next fifteen years. This process developed its greatest momentum at the periphery of Spanish power in South America--in what became Venezuela and Colombia in the north and the Río de la Plata region, particularly Argentina, in the south.

Not until both movements converged in Peru during the latter phases of the revolt, specifically the 4,500-man expeditionary force led by General José de San Martín that landed in Pisco in September 1820, was Spanish control of Peru seriously threatened. San Martín, the son of a Spanish army officer stationed in Argentina, had originally served in the Spanish army but returned to his native Argentina to join the rebellion. Once Argentine independence was achieved in 1814, San Martín conceived of the idea of liberating Peru by way of Chile. As commander of the 5,500-man Army of the Andes, half of which was composed of former black slaves, San Martín, in a spectacular military operation, crossed the Andes and liberated Chile in 1817. Three years later, his somewhat smaller army left Valparaíso for Peru in a fleet commanded by a former British admiral, Thomas Alexander Cochrane (Lord Dundonald).

Although some isolated stirrings for independence had manifested themselves earlier in Peru, San Martín's invasion persuaded the conservative creole intendant of Trujillo, José Bernardo de Tagle y Portocarrero, that Peru's liberation was at hand and that he should proclaim independence. The defeat of the last bastion of royal power on the continent, however, proved a slow and arduous task. Although a number of other coastal cities quickly embraced the liberating army, San Martín was able to take Lima in July 1821 only when the viceroy decided to withdraw his considerable force to the Sierra, where he believed he could better make a stand. Shortly thereafter, on July 28, 1821, San Martín proclaimed Peru independent and then was named protector by an assembly of notables. However, a number of problems, not the least of which was a growing Peruvian resentment over the heavy-handed rule of the foreigner they dubbed "King José," stalled the campaign to defeat the royalists. As a result, San Martín decided to seek aid from Simón Bolívar Palacios, who had liberated much of northern South America from Spanish power.

The two liberators met in a historic meeting in Guayaquil in mid-1822 to arrange the terms of a joint effort to complete the liberation of Peru. Bolívar refused to agree to a shared partnership in the Peruvian campaign, however, so a frustrated San Martín chose to resign his command and leave Peru for Chile and eventual exile in France. With significant help from San Martín's forces, Bolívar then proceeded to invade Peru, where he won the Battle of Junín in August 1824. But it remained for his trusted lieutenant, thirty-one-year-old General Antonio José de Sucre Alcalá, to complete the task of Peruvian independence by defeating royalist forces at the hacienda of Ayacucho near Huamanga (a city later renamed Ayacucho)

on December 9, 1824. This battle in the remote southern highlands effectively ended the long era of Spanish colonial rule in South America.

Primary document: [Act of the Independence of Peru](#) (July 15, 1821).

### **Venezuela:**

Miranda was born in Caracas of wealthy *criollo* parents in 1750. Following a checkered career in the Spanish Army, Miranda spent virtually the rest of his life living in nations that were at odds with Spain, seeking support for the cause of the independence of his native Spanish America. Although he was a professed admirer of the newly independent United States, Miranda's political vision of Latin America, beyond independence, remained equivocal. In 1806 he led an expedition that sailed from New York and landed at Coro, in western Venezuela. Expecting a popular uprising, he encountered instead hostility and resistance. Miranda returned to Britain, where in 1810 Bolívar persuaded him to return to Venezuela at the head of a second insurrectionary effort.

Events in Europe were perhaps even more crucial to the movement for Latin American independence than Miranda's efforts. In 1808 French emperor Napoleon Bonaparte's troops invaded Spain amidst a family dispute in which the Spanish king Charles IV had been forced to abdicate the throne in favor of his son, Ferdinand VII. The fearful Bourbon royal family soon became Napoleon's captives, and in 1810 the conquering French emperor granted his brother, Joseph, the Spanish throne, precipitating a four-year-long guerrilla war in Spain.

These events had important repercussions in the Caracas *cabildo* (city council). Composed of a *criollo* elite whose allegiance to the crown had already been stretched thin by the gross incompetence of Charles and his feud with his son, the *cabildo* refused to recognize the French usurper. Meeting as a *cabildo abierto* (town meeting) on April 19, 1810, the Caracas *cabildo* ousted Governor Vicente Emparán and, shortly thereafter, declared itself to be a junta governing in the name of the deposed Ferdinand VII. On July 5, 1811, a congress convoked by the junta declared Venezuelan independence from Spain. Miranda assumed command of the army and leadership of the junta.

A constitution, dated December 21, 1811, marked the official beginning of Venezuela's First Republic. Known commonly by Venezuelan historians as La Patria Boba, the Silly Republic, Venezuela's first experiment at independence suffered from myriad difficulties from the outset. The *cabildos* of three major cities--Coro, Maracaibo, and Guayana--preferring to be governed by Joseph Bonaparte rather than by the Caracas *cabildo*, never accepted independence from Spain. The First Republic's leadership, furthermore, distrusted Miranda and deprived him of the powers necessary to govern effectively until it was too late. Most damaging, however, was the initial failure of the Caracas *criollo* elite insurgents to recognize the need for popular support for the cause of independence. Venezuela's popular masses, particularly the *pardos*, did not relish being governed by the white elite of Caracas and therefore remained loyal to the crown. Thus, a racially defined civil war underlay the early years of the long independence struggle in Venezuela.

When a major earthquake in March 1812 devastated proindependence strongholds while sparing virtually every locale commanded by royalist forces, it seemed that the very forces of nature were conspiring against La Patria Boba. Despite the gravity of the circumstances, Miranda's July 25, 1812, surrender of his troops to the Spanish commander, General Domingo Monteverde, provoked a great deal of resentment among Bolívar and his other subordinates. Miranda died in a Spanish prison in 1816; Bolívar managed to escape to New Granada (present-day Colombia), where he assumed the leadership of Venezuela's independence struggle.

Bolívar was born in 1783 into one of Caracas's most aristocratic *criollo* families. Orphaned at age nine, he was educated in Europe, where he became intrigued by the intellectual revolution called the Enlightenment and the political revolution in France. As a young man, Bolívar pledged himself to see a united Latin America, not simply his native Venezuela, liberated from Spanish rule. His brilliant career as a field general began in 1813 with the famous cry of "war to the death" against Venezuela's Spanish

rulers that was followed by a lightning campaign through the Andes to capture Caracas. There he was proclaimed "The Liberator" and, following the establishment of the Second Republic, was given dictatorial powers. Once again, however, Bolívar overlooked the aspirations of common, nonwhite Venezuelans. The *llaneros* (plainsmen), who were excellent horsemen, fought under the leadership of the royalist caudillo, José Tomás Boves, for what they saw as social equality against a revolutionary army that represented the white, *criollo* elite. By September 1814, having won a series of victories, Boves's troops forced Bolívar and his army out of Caracas, bringing an end to the Second Republic.

After Ferdinand VII regained the Spanish throne in late 1814, he sent reinforcements to the American colonies that crushed most remaining pockets of resistance to royal control. Bolívar was forced to flee to Jamaica, where he issued an eloquent letter that established his intellectual leadership of the Spanish American independence movement. A number of local *caudillos* kept the movement alive in Venezuela. One, José Antonio Páez, a *mestizo*, was able to convince his fellow *llaneros* along the Río Apure that Boves (who had been killed in battle in late 1814) had been mistaken: that the Spanish, not the *criollo* patriots, were the true enemies of social equality.

Based near the mouth of the Río Orinoco, Bolívar defeated the royalist forces in the east with the help of several thousand volunteer European recruits, veterans of the Napoleonic Wars. Although Caracas remained in royalist hands, the 1819 Congress at Angostura (present-day Ciudad Bolívar) established the Third Republic and named Bolívar as its first president. Bolívar then quickly marched his troops across the llanos and into the Andes, where a surprise attack on the Spanish garrison at Boyacá, near Bogotá, routed the royalist forces and liberated New Granada. Nearly two years later, in June 1821, Bolívar's troops fought the decisive Battle of Carabobo that liberated Caracas from Spanish rule. In August delegates from Venezuela and Colombia met at the border town of Cúcuta to formally sign the Constitution of the Republic of Gran Colombia, with its capital in Bogotá. Bolívar was named president.

Bolívar, however, continued the fight for the liberation of Spanish America, leading his forces against the royalist troops remaining in Ecuador, Bolivia, and Peru. In the meantime, the Bolivarian dream of Gran Colombia was proving to be politically unworkable. Bolívar's fellow Venezuelans became his enemies. King Ferdinand, after an 1820 revolt by liberals in Spain, had lost the political will to recover the rebellious American colonies. But the Venezuelans themselves expressed resentment at being governed once again from far-off Bogotá.

Venezuelan nationalism, politically and economically centered in Caracas, had been an ever-increasing force for over a century. During the 1820s, Venezuelan nationalism was embodied in the figure of General Páez. Even the tremendous prestige of Bolívar could not overcome the historical reality of nationalism, and in 1829 Páez led Venezuela in its separation from Gran Colombia. Páez ordered the ailing and friendless Bolívar into exile. Shortly before his death in December 1830, the liberator of northern South America likened his efforts at Latin American unity to having "plowed the sea."

Primary documents: [Don Manuel Torres to the Secretary of States \(John Quincy Adams\) page 1](#) (November 1821), [Don Manuel Torres to the Secretary of States \(John Quincy Adams\) page 2](#) (November 1821), and [Simón de Bolívar: Message to the Congress of Angostura, 1819](#)

NOTE: Don Manuel Torres delivered, among other papers, a letter from the vice president of the newly declared Republic of Columbia—created from a combination of Venezuela and New Granada [present-day Venezuela, Colombia, Panama, and Ecuador]—introducing himself as an official agent of the Colombian government.

# The Monroe Doctrine: A Close Reading

**Lesson Three of the Curriculum Unit:** The Monroe Doctrine: Origin and Early American Foreign Policy

## Guiding Question

- To what events in United States and European foreign affairs does the Monroe Doctrine refer?
- What was the primary purpose behind the Monroe Doctrine?

## Learning Objectives

After completing this lesson, students will be able to:

- Relate specific passages in the Monroe Doctrine to events in early U.S. diplomacy.

## Introduction

To understand the Monroe Doctrine, it is essential that the class have a basic background in early American diplomacy (presented in Lesson One).

Briefly share the patriotic broadside [The First Great Western Empire](#) (from the Library of Congress) published June 1812, the month in which the War of 1812 was declared. If desired, use the Written Document Analysis Worksheet located at the end of the Materials pages to aid your analysis.

Patriotic fervor at a time of war is to be expected, but in what sense, if any, was the United States of 1812 an "empire?" Have students look up the word in the dictionary. We cannot know with certainty now how widespread the feeling was then that the United States was an empire, or an empire-in-the-making. But the kind of expansionist agenda that goes hand-in-hand with empire building is sometimes cited as a motivation behind the Monroe Doctrine. Remember that James Monroe served as secretary of state and secretary of war during the War of 1812. As students read the Monroe Doctrine, they can decide for themselves what was truly its purpose..

## Activity

Read with the class the text of The Monroe Doctrine from the handout "The Monroe Doctrine: A Close Reading" on pages 10-11 of the Monroe Doctrine Resource Material at the end of these lessons. The handout replaces the original paragraphing and, instead, organizes the text by subject. It contains all of the language of the original. Discuss the text with the class using the following questions as guidelines: To what event(s) or condition(s) in the history of the United States and/or its diplomacy does each section refer?

- In what ways, if any, does the Monroe Doctrine address American concerns for peace and safety?
- In what ways, if any, does the Monroe Doctrine invoke U.S. sympathy for revolutionary governments in South America?
- In what ways, if any, does the Monroe Doctrine continue the American policy of neutrality?
- In what ways, if any, does the Monroe Doctrine address American desires to expand its territory?
- Do students see any other motives behind the Monroe Doctrine?

## Assessment

Students should be able to respond effectively to the bulleted questions above. Ask students to state in writing, supported by evidence, their answer to this question: *What was the primary purpose behind the Monroe Doctrine?*

# The Monroe Doctrine: Whose Doctrine Was It?

**Lesson Four of the Curriculum Unit:** The Monroe Doctrine: Origin and Early American Foreign Policy

## Guiding Question

- In what ways did John Quincy Adams and Thomas Jefferson contribute to the formulation of the Monroe Doctrine?

## Learning Objectives

After completing this lesson, students will be able to:

- List contributions of James Monroe, John Quincy Adams, and Thomas Jefferson to U.S. diplomacy.
- Cite specific evidence to show the likely contributions of John Quincy Adams and Thomas Jefferson in the formulation of the Monroe Doctrine.

## Introduction

[This document is] the most momentous [pronouncement] which has been . . . offered . . . since that of Independence. That made us a nation. This sets our compass and points the course.

—[Thomas Jefferson to James Monroe, October 24, 1823](#) (from correspondence in which the authors discussed ideas eventually incorporated into the Monroe Doctrine).

An entry from InfoUSA, [The Monroe Doctrine \(1823\)](#), states:

*In Monroe's message to Congress on December 2, 1823, he delivered what we have always called the Monroe Doctrine, although in truth it should have been called the Adams Doctrine.*

The writer expresses the opinion that the Monroe Doctrine should have been named after John Quincy Adams to honor his role in its formulation. There is also evidence to indicate that former President Thomas Jefferson strongly influenced President Monroe. Perhaps it should be called the Jefferson Doctrine. Or perhaps the document should have more than one name in its title.

In reality, most important government policies such as the Monroe Doctrine are collaborations. However, to hypothesize about the relative contributions of Monroe, Adams, and Jefferson is an interesting exercise requiring an understanding of U.S. diplomacy. There is no "smoking gun," no particular document directly specifying the contributions of one or the other to the Monroe Doctrine. Instead, students should get a sense of the beliefs and methods of each man by studying his role in American diplomatic history and his statements.

## Activity

Divide the class into three groups and assign each group responsibility for arguing on behalf of the role played by one of the three contributors to the Monroe Doctrine (alternatively, you could form six groups, with two groups assigned to each contributor). For each figure, students are provided some background information and excerpts from archival documents to use in finding evidence. To make a compelling case for their contributor, students need to refer to the text of the Monroe Doctrine and statements by or about their assigned figure to support the case for his contributions. Students are encouraged—time permitting—to find additional sources on their own.

If time is limited, each group can simply present a summary, offering evidence that its assigned contributor deserves to have his name attached to the Doctrine. After all the groups have presented,

discuss the relative contributions of each man. Take suggestions for renaming the Doctrine based on the information presented. One, two, or all three names can be attached to the Doctrine. A show of hands can demonstrate the relative support for each suggestion. Time permitting, the class can hold a more formal debate. All the students should participate in the research and preparation of presentations; however, each group should designate which members will be responsible for each of the four parts of the debate. Suggested guidelines for a 30-minute debate format are provided for the teacher on page 12 of the Monroe Doctrine Resource Materials that follow these lessons. Adapt the chart, procedures, and allotted times for your own class as desired. The format for the debate follows:

- Each group, in turn, presents its opening statement and argument;
  - Each group, in turn, will refute the arguments presented by its opponents;
  - Each group, in turn, will ask questions of the opposing teams; opponents will have up to 30 seconds to respond;
  - Each group, in turn, will present closing statements in which students summarize their positions and cite their strongest arguments.
- Classes with six groups should consider combining into three for the debate.

NOTE: Students can read the full text of each of the documents by clicking on the links. Or, groups can use the excerpts from the documents for each contributor provided in the Monroe Doctrine Resource Material handouts on pages 13-25. The excerpts are all in the language of the original.

Annotations in parentheses define terms in italics or add information. Some spelling and punctuation has been standardized. Abbreviations with the potential to be confusing have been replaced with full names.

## GROUP 1: JAMES MONROE

### Questions

- What events in Monroe's background probably influenced the Monroe Doctrine?
- How would you characterize Monroe's philosophy and approach to conducting diplomacy?

### Background

- [James Monroe](http://www.americanpresident.org/history/jamesmonroe/) [http://www.americanpresident.org/history/jamesmonroe/]
- [James Monroe Museum and Memorial Library](http://www.umw.edu/jamesmonroemuseum/) [http://www.umw.edu/jamesmonroemuseum/]

### Documents

- November/December 1817: [To Chiefs and Warriors From President](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=016/llsp016.db&recNum=693) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=016/llsp016.db&recNum=693]
- March 1818: In response to a House resolution of the previous December, President Madison introduces Secretary Adams's report on the [Independence of the Spanish Provinces](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=173) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=173]
- 1818: Monroe Defends Acquisition of Florida in [Acquiring Florida, 1818, by James Monroe](http://www.digitalhistory.uh.edu/documents/documents_p2.cfm?doc=391) [http://www.digitalhistory.uh.edu/documents/documents\_p2.cfm?doc=391].
- March 5, 1821: [Monroe's Second Inaugural Address](http://avalon.law.yale.edu/19th_century/monroe2.asp) [http://avalon.law.yale.edu/19th\_century/monroe2.asp ]
- March/April 1822: [Political Condition of the Spanish Provinces of South America](http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=825) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&recNum=825]
- June 2, 1823: [James Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID%2B@lit(jm040131))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID%2B@lit(jm040131))]
- October 17, 1823: [Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+%2B@lit(jm040137))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+%2B@lit(jm040137))]

## GROUP 2: JOHN QUINCY ADAMS

### Questions

- Which events in American diplomacy should be credited to Secretary of State John Quincy Adams?
- What factor(s) influenced Adams's thinking about foreign policy -- keeping the United States neutral so it could develop on its own without the influence of the European powers? Expanding the borders of the United States? Protecting the homeland? Other factors?
- What is characteristic about Adams's approach to diplomacy?

### Background

- [John Quincy Adams](http://millercenter.org/academic/americanpresident/jqadams) [http://millercenter.org/academic/americanpresident/jqadams]. Focus on the role of Secretary of State Adams in [James Monroe's](#) presidency.

### Documents

- [Rush-Bagot Treaty, 1817](http://www.state.gov/r/pa/ho/time/jd/91716.htm): Relative to Naval Forces on the American Lakes. [http://www.state.gov/r/pa/ho/time/jd/91716.htm]
- March 1818: In response to a House resolution of the previous December, President Monroe introduces Secretary Adams's report on the [Independence of the Spanish Provinces](#). This document is included here not for its content but to show that the question of recognizing the revolutionary governments of Spanish America was under consideration for a long time. Interested students can view a series of documents following President Monroe's introduction by Adams and important figures such as Bernardo O'Higgins. [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=173]
- October 20, 1818: [Convention of 1818 between the U.S. and Great Britain](#), set the 49th parallel as the U.S.-Canadian border from Minnesota to the Rocky Mountains. [http://avalon.law.yale.edu/subject\_menus/br1818m.asp]
- November 28, 1818: [Letter from Secretary of State Adams to Spanish Minister to the United States Don Luis de Onís](#) demonstrates Adams's negotiating style in the months before the Adams-Onís Treaty (the Adams-Onís Treaty was signed on February 22, 1819). [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=530]
- February 22, 1819: [Transcontinental Treaty with Spain signed \(ratified February 22, 1821\)](#) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=136]
- May 20, 1820: Extract of a letter from Minister to Spain [John Forsythe to JQ Adams on the Cessation of Florida](#). [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=280]
- July 4, 1821: [Warning Against the Search for Monsters to Destroy](#) [http://www.mtholyoke.edu/acad/intrel/jqadams.htm]
- February 25, 1822: [J.Q. Adams to the Russian Minister to the United States](#) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=004/llsp004.db&Page=861]
- July 22, 1823: [Instructions from Adams to Middleton in Negotiating with Russia](#) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=445]
- August 18, 1823: [J.Q. Adams on Greek Revolution](#) [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&Page=257]
- November 7, 1823: [John Quincy Adams's Account of the Cabinet Meeting of November 7, 1823](#) [http://www.mtholyoke.edu/acad/intrel/jqacab.htm].
- December 18, 1823: [New York Citizens Petition of Sympathy for Greece](#), demonstrating public sympathy toward revolutionary movements. [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=260]
- 1824: [Convention with Russia](#), the conclusion of Adams's efforts in negotiating with Russia. [http://memory.loc.gov/cgi-bin/ampage?collId=llsp&fileName=005/llsp005.db&recNum=442]

## GROUP 3: THOMAS JEFFERSON

### Questions

- How did Jefferson's diplomatic experiences as president influence his thinking?
- What factor(s) influenced Jefferson's thinking about foreign policy -- keeping the United States neutral so it could develop on its own without the influence of the European powers? Expanding the borders of the United States? Protecting the homeland? Other factors?
- What was the nature of the advice Jefferson gave Monroe? Did it change over time? How strong was Jefferson's influence?
- How would you characterize Jefferson's philosophy and approach to conducting diplomacy?

### Background

- [Thomas Jefferson: Foreign Affairs](http://millercenter.org/academic/americanpresident/Jefferson) [http://millercenter.org/academic/americanpresident/Jefferson]

### Documents

- April 18, 1802: The Affair of Louisiana: [To the U.S. Minister to France \(ROBERT R. LIVINGSTON\), Washington](http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6142763&textreg=1&query=Louisiana) [http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6142763&textreg=1&query=Louisiana]
- January 13, 1803: Crisis on the Mississippi: [To the Special Envoy to France \(JAMES MONROE\), Washington](http://etext.lib.virginia.edu/etcbin/toccer-new2?id=JefLett.sgm&images=images/modeng&data=/texts/english/modeng/parsed&tag=public&part=148&division=div1) [http://etext.lib.virginia.edu/etcbin/toccer-new2?id=JefLett.sgm&images=images/modeng&data=/texts/english/modeng/parsed&tag=public&part=148&division=div1]
- August 12, 1803: Jefferson's Expansionism: The Louisiana Purchase: [To John C. Breckinridge, Monticello](http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6224382&textreg=1&query=Louisiana) [http://etext.virginia.edu/etcbin/ot2www-singleauthor?specfile=/web/data/jefferson/texts/jefall.o2w&act=text&offset=6224382&textreg=1&query=Louisiana]
- 1816: [Jefferson to Monroe on South America](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(tj110168))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(tj110168))]
- 1818: [Revolt in South America](http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=9006069&tag=8019.+SOUTH+AMERICA,+Revolt+in.+--+&query=south+america&id=JCE8019) [http://etext.virginia.edu/etcbin/ot2www-foley?specfile=/texts/english/jefferson/foley/public/JefCycl.o2w&act=surround&offset=9006069&tag=8019.+SOUTH+AMERICA,+Revolt+in.+--+&query=south+america&id=JCE8019]
- February 21, 1823: [Thomas Jefferson to James Monroe](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040128))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040128))]
- April 14, 1823: [James Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040130))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040130))]
- June 2, 1823: [James Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040131))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040131))]
- June 11, 1823: [Thomas Jefferson to James Monroe](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040132))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040132))]
- August 18, 1823: [Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040135))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040135))]
- October 17, 1823: [Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040137))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040137))]
- October 24, 1823: [Thomas Jefferson to James Monroe](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040139))) [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040139))]
- December 1823: [James Monroe to Thomas Jefferson](http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040141))) (dated "Received December 11") [http://memory.loc.gov/cgi-bin/query/r?ammem/mtj:@field(DOCID+@lit(jm040141))]

## Assessment

Observe students' understanding of the key concepts during the class debate on the contributions made by Jefferson, Monroe, and Adams. Following the debate, students should be able to respond effectively to the following questions:

- What were the most significant contributions of Thomas Jefferson, James Monroe, and John Quincy Adams to U.S. diplomacy?
- What contributions did Jefferson and Adams make to the formulation of the Monroe Doctrine?

Ask students to (1) write a brief essay, supported by evidence, taking a stand on the most appropriate name for the Monroe Doctrine, or (2) write an essay in which they analyze and evaluate the collective approach used to formulate foreign policy during Monroe's administration.

## Extending the Lesson

Though little noticed when first announced, the Monroe Doctrine has been invoked a number of times. One important example is the Roosevelt Corollary. Below is a list of resources and/or links to use as a starting point for research:

- [Henry Cabot Lodge: Corollary to the Monroe Doctrine](http://www.mtholyoke.edu/acad/intrel/lodge2.htm) on Documents Relating to American Foreign Policy, a link from World War I Document Archive [http://www.mtholyoke.edu/acad/intrel/lodge2.htm].
- [Teddy Roosevelt's World View](http://www.pbs.org/wgbh/amex/tr/mccull4.html) on PBS's American Experience [http://www.pbs.org/wgbh/amex/tr/mccull4.html].
- [The Roosevelt Corollary and the Monroe Doctrine](http://www.theodoreroosevelt.org/life/rooseveltcorollary.htm) [http://www.theodoreroosevelt.org/life/rooseveltcorollary.htm]
- [The Kennedy Doctrine](http://www.time.com/time/magazine/article/0,9171,827518-1,00.html) [http://www.time.com/time/magazine/article/0,9171,827518-1,00.html]. An insightful and interesting magazine piece about John F. Kennedy's "Corollary to the Monroe Doctrine" in response to the Cuban Missile Crisis. Describes in detail the formation of the original Monroe Doctrine and contains numerous references to various interpretations of the Monroe Doctrine by governmental leaders.
- [The Reagan Doctrine](http://www.time.com/time/magazine/article/0,9171,964873-1,00.html) [http://www.time.com/time/magazine/article/0,9171,964873-1,00.html]. An easy to read opinion piece about the "Reagan Doctrine" and how it relates to ideas about the Monroe Doctrine and international intervention.
- [Learn More About the Monroe Doctrine](http://www.ourdocuments.gov/doc.php?flash=true&doc=23) [http://www.ourdocuments.gov/doc.php?flash=true&doc=23].

**MONROE DOCTRINE**  
**RESOURCE MATERIALS**

# Documentary Timeline: American Diplomacy Before the Monroe Doctrine

**1782, Nov. 30:** Preliminary Articles of Peace (between the United States and Britain). The king of England recognizes the United States. A U.S. border is defined.  
Document: [Preliminary Articles of Peace](http://avalon.law.yale.edu/18th_century/prel1782.asp) [http://avalon.law.yale.edu/18th\_century/prel1782.asp]

**1783, April 15:** Articles of Peace ratified by Congress.

**1784:** Spain closes the Mississippi River to American shipping.

**1785, July 20:** Jay-Gardoqui Negotiations.  
The negotiations center on Spain's disagreement with U.S. border provisions in the Articles of Peace as well as Spain's closure of the Mississippi. John Jay, as authorized by Congress, meets with Spanish minister, Don Diego de Gardoqui, but without resolution.

**1789, July 14:** Bastille Day -- The French Revolution begins.  
At first, many Americans are sympathetic to the French Revolution, especially those who aligned themselves politically and intellectually with the Jefferson and Madison.

**1789, April:** George Washington becomes the first U.S. president.

**1792, Sept. 21:** A French Republic is proclaimed, but American sympathy toward France weakens.

**1793-1794:** Years of Crisis for the New American Republic's Foreign Relations and Internal Politics  
Document: Brief secondary account from Digital History of events in the United States that confounded the international situation:  
[Years of Crisis](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=8) [http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=8]

"In 1793 and 1794 a series of crises threatened to destroy the new national government:

- France tried to entangle America in its war with England;
- Armed rebellion erupted in western Pennsylvania;
- Indians in Ohio threatened American expansion; and
- War with Britain appeared imminent..."

**1793, Feb. 1:** France declares war on Great Britain, Spain, and Holland.

**1793, April 22:** Washington issues a proclamation of neutrality.  
Document: [The Proclamation of Neutrality, 1793](http://avalon.law.yale.edu/18th_century/neutra93.asp)  
[http://avalon.law.yale.edu/18th\_century/neutra93.asp]

**1794, Summer:** The Battle of Fallen Timbers  
General Anthony Wayne defeats the Indians of Ohio. More settlers move into the frontier.  
Brief Secondary Account: [Fallen Timbers Battlefield](http://lcweb2.loc.gov/diglib/legacies/OH/200003440.html)  
[http://lcweb2.loc.gov/diglib/legacies/OH/200003440.html]

**1794, Nov. 19:** Jay's Treaty signed (negotiations with Great Britain over unresolved issues).  
Document: [The Jay Treaty of 1794](http://avalon.law.yale.edu/subject_menus/jaymenu.asp) [http://avalon.law.yale.edu/subject\_menus/jaymenu.asp]  
Brief Secondary Account: [John Jay's Treaty](http://www.state.gov/r/pa/ho/time/nr/14318.htm) [http://www.state.gov/r/pa/ho/time/nr/14318.htm]

“The only concessions Jay obtained” were “a surrender of the northwestern posts (already agreed to in 1783) and a commercial treaty with Great Britain that granted the United States “most favored nation” status, but seriously restricted U.S. commercial access to the British West Indies. All other outstanding issues – the Canadian-Maine boundary, compensation for pre-revolutionary debts, and British seizures of American ships – were to be resolved by arbitration. Jay even conceded that the British could seize U.S. goods bound for France if they paid for them and could confiscate without payment for French goods on American ships. The treaty was immensely unpopular....”

“In 1794, President George Washington sent Monroe to France as the U.S. minister, a title equivalent to ambassador in those days. It was an eventful appointment that lasted two years. Monroe and his family became avid Francophiles. They learned to speak French fluently, socialized with French celebrities, adopted French taste in food and dress, and sent their daughter to the best French academy in Paris. When Thomas Paine, the great British pamphleteer and radical supporter of the American Revolution, was imprisoned for having spoken against the execution of King Louis XVI, Monroe won his release and allowed Paine to live for a time with his family at the American minister’s residence in Paris. However, Monroe’s popularity with the French strained his relationship with President Washington. At issue was Washington’s strict neutrality toward England and France. When the United States signed the controversial Jay’s Treaty with Great Britain, which did little to settle the issue of English violation of American rights on the high seas, Monroe refused to actively defend the treaty against French objections. For his silence, Washington recalled him.”

**1796, Sept. 17:** Washington’s Farewell Address  
Document: [Washington’s Farewell Address](http://avalon.law.yale.edu/18th_century/washing.asp)  
[[http://avalon.law.yale.edu/18th\\_century/washing.asp](http://avalon.law.yale.edu/18th_century/washing.asp)]

“The great rule of conduct for us in regard to foreign nations is in extending our commercial relations, to have with them as little political connection as possible.”

Brief Secondary Account: [Washington’s Farewell Address](http://www.state.gov/r/pa/ho/time/nr/14319.htm)  
[<http://www.state.gov/r/pa/ho/time/nr/14319.htm>]

“Frustrated by French meddling in U.S. politics, Washington warned the nation to avoid permanent alliances with foreign nations and to rely instead on temporary alliances for emergencies. Washington’s efforts to protect the fragile young republic by steering a neutral course between England and France during the French Revolutionary Wars was made extremely difficult by the intense rhetoric flowing from the pro-English Federalists, led by Alexander Hamilton, and the pro-French, personified by Thomas Jefferson.”

**1797 April:** John Adams becomes president.  
Brief Secondary Account: [The Presidency of John Adams](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=10)  
[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=10](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=10)]

“During Adams’s presidency, the United States faced its most serious international crisis yet: an undeclared naval war with France. In the Jay Treaty, France perceived an American tilt toward Britain, especially in a provision permitting the British to seize French goods from American ships in exchange for financial compensation. France retaliated by capturing hundreds of vessels flying the U.S. flag.

...The Federalist-controlled (and pro-English) Congress prepared for war by authorizing a 20,000-man army and calling George Washington out of retirement as commander in chief. During the winter of 1798, an undeclared naval war took place between France and the United States.”

**1798-1800:** Undeclared Naval War (Quasi War) with France  
Documents: [The Quasi War with France, 1791-1800](http://avalon.law.yale.edu/subject_menus/quasi.asp)  
[[http://avalon.law.yale.edu/subject\\_menus/quasi.asp](http://avalon.law.yale.edu/subject_menus/quasi.asp)]

**1800:** Treaty of San Ildefonso (Spain secretly cedes Louisiana back to France).  
Document: [Treaty of San Ildefonso: Retrocession of Louisiana from Spain to France](http://avalon.law.yale.edu/19th_century/ildefens.asp)  
[http://avalon.law.yale.edu/19th\_century/ildefens.asp]

**1801:** Thomas Jefferson becomes president.

**1803:** Louisiana Purchase Negotiations and Treaty

“In 1803, the victorious Jefferson sent Monroe as a special envoy to France to help negotiate the Louisiana Purchase.” The intent was to obtain the territory of the lower Mississippi (Louisiana) and secure the ports in New Orleans for U.S. shipping. Instead, France, in an effort to raise money for its conflict in Europe, sells the entire “Louisiana Territory” – a vast swath of land west of the Mississippi and east of the Rocky Mountains from the border with Canada-Great Britain in the north and the Gulf in the south.

Documents: [Louisiana Purchase Treaty](http://avalon.law.yale.edu/subject_menus/fr1803m.asp) [http://avalon.law.yale.edu/subject\_menus/fr1803m.asp]  
Brief Secondary Account: [The Louisiana Purchase](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=16)  
[http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=16]

“From 1803 to 1807, Monroe served as the U.S. minister to Great Britain, an unproductive stint in which he failed to persuade the British to stop the impressment of U.S. sailors on the high seas and failed to convince Spain to settle the disputed boundaries in Florida.”

**1803, May:** France declares war on Great Britain.  
Brief Secondary Account: [The Eagle, the Tiger, and the Shark](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=18)  
[http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=18]

**1807, Dec. 22:** Embargo of 1807 (embargo on foreign trade designed to emphasize U.S. neutrality)  
Brief Secondary Account: [Embargo of 1807](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=19)  
[http://www.digitalhistory.uh.edu/database/article\_display.cfm?HHID=19]

“In effect for 15 months, the embargo exacted no political concessions from either France or Britain. But it had produced economic hardship, evasion of the law, and political dissension at home... The problem of defending American rights on the high seas now fell to Jefferson’s hand-picked successor, James Madison.”

**1808-1814:** The Napoleonic War (known in Spanish history as the War of Independence). Ferdinand VII, the king of Spain who had great popularity when he assumed the throne in 1808, is eventually imprisoned in France.

**1810, May 14:** West Florida declared part of the Mississippi Territory by Congress.

**1811, Nov. 7:** Battle of Tippecanoe. Despite heavy losses, troops under General William Henry Harrison defeat Native Americans commanded by Tecumseh. Many Americans believe the British had been responsible for inciting the Native Americans against the U.S. government.

“...just before the outbreak of the War of 1812, President Madison named Monroe his secretary of state. He remained at the post until 1817 and also functioned for a time as Madison’s secretary of war. In this latter capacity, Monroe unsuccessfully tried to institute a compulsory draft, settling instead for an increase of land bounties to entice more volunteers to join the U.S. Army for the duration of the war with England. He was successful, however, in stabilizing a deteriorating situation and prevented an outright U.S. defeat by the British in the War of 1812.”

**1812, June 18:** Congress declares war against Great Britain (the main cause was Great Britain's interference with American trade on the high seas).

Document: [1812—Declaration of War with Great Britain](http://avalon.law.yale.edu/19th_century/1812-01.asp)

[[http://avalon.law.yale.edu/19th\\_century/1812-01.asp](http://avalon.law.yale.edu/19th_century/1812-01.asp)]

Brief Secondary Account: [A Second War of Independence](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=20)

[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=20](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=20)]

**1812-1819:** Five new states added to the Union (Louisiana, Indiana, Mississippi, Illinois and Alabama).

Brief Secondary Account: [Conquering Space](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=572)

[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=572](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=572)]

**1814:** Ferdinand VII is restored to the Spanish throne. He immediately assumes absolute power, dismisses the Cadiz Corte (Spain's representative assembly which first met in 1810), and revokes the 1812 Constitution (which had been a revolutionary document for Spain). During years of chaos in Spain, its colonies in the North and South American continents began proclaiming themselves independent. Most established republican governments.

**1814, Dec. 24:** Peace Treaty with Great Britain

Document: [Treaty of Ghent](http://avalon.law.yale.edu/19th_century/ghent.asp) [[http://avalon.law.yale.edu/19th\\_century/ghent.asp](http://avalon.law.yale.edu/19th_century/ghent.asp)]

Brief Secondary Account: [The War's Significance](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=22)

[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=22](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=22)]

"...the War of 1812 was crucial for the United States. First, it effectively destroyed the Indians' ability to resist American expansion east of the Mississippi River... Second, the war allowed the United States to rewrite its boundaries with Spain and solidify control over the lower Mississippi River and the Gulf of Mexico. Although the United States did not defeat the British Empire, it had fought the world's strongest power to a draw. Spain recognized the significance of this fact, and in 1819 Spanish leaders abandoned Florida and agreed to an American boundary running clear to the Pacific Ocean."

**1816 December:** The Barbary Treaties

Document: [The Barbary Treaties](http://avalon.law.yale.edu/19th_century/bar1816t.asp) [[http://avalon.law.yale.edu/19th\\_century/bar1816t.asp](http://avalon.law.yale.edu/19th_century/bar1816t.asp)]

**1817, March 4:** James Monroe becomes president.

Brief Secondary Account: [The Growth of American Nationalism](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=567)

[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=567](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=567)]

Brief Secondary Account: [Defending American Interests in Foreign Affairs](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=573)

[[http://www.digitalhistory.uh.edu/database/article\\_display.cfm?HHID=573](http://www.digitalhistory.uh.edu/database/article_display.cfm?HHID=573)]

"The critical foreign policy issue facing the United States after the War of 1812 was the fate of Spain's crumbling New World empire. Many of Spain's New World colonies had taken advantage of turmoil in Europe during the Napoleonic Wars to fight for their independence. These revolutions aroused intense sympathy in the United States, but many Americans feared that European powers might restore monarchical order in Spain's New World.

A source of particular concern was Florida, which was still under Spanish control. Pirates, fugitive slaves, and Native Americans used Florida as a sanctuary and as a jumping off point for raids on settlements in Georgia. In December 1817, to end these incursions, Monroe authorized General Andrew Jackson to lead a punitive expedition against the Seminole Indians in Florida. Jackson attacked the Seminoles, destroyed their villages, and overthrew the Spanish governor. He also court-martialed and executed two British citizens whom he accused of inciting the Seminoles to commit atrocities against Americans.

Jackson's actions provoked a furor in Washington. ... Secretary of State Adams, however, saw in Jackson's actions an opportunity to wrest Florida from Spain. Instead of apologizing for Jackson's conduct, Adams declared that the Florida raid was a legitimate act...

The Era of Good Feelings that followed the War of 1812 marked one of the most successful periods in American diplomacy. Apart from ending the attacks of the Barbary pirates on American shipping, the United States settled many of its disagreements with Britain, acquired Florida from Spain, defined its western and southwestern boundaries, convinced Spain to relinquish its claims to the Oregon region, and delivered a strong warning that European powers were not to interfere in the Western Hemisphere.”

**1817, April:** Rush-Bagot Treaty

Document: [Exchange of Notes 1817: Proclamation Relative to Naval Forces on the American Lakes, a.k.a. Rush-Bagot Treaty](http://avalon.law.yale.edu/19th_century/br1817p.asp) [http://avalon.law.yale.edu/19th\_century/br1817p.asp]

**1819, February:** Spain sells Florida to the United States and sets a definite border between Spanish possessions and the Louisiana Territory.

Document: [Treaty of Amity, Settlement, and Limits between the United States of America and His Catholic Majesty](http://avalon.law.yale.edu/19th_century/sp1819.asp) , a.k.a. Adams-Onis Treaty [http://avalon.law.yale.edu/19th\_century/sp1819.asp]

**1820:** Map: [The United States in 1820](http://xroads.virginia.edu/~MAP/TERRITORY/1820map.html) [http://xroads.virginia.edu/~MAP/TERRITORY/1820map.html]

**1822:** France, delegated by the “Holy Alliance,” restores Ferdinand VII to absolute power. Brazil declares its independence from Portugal.

**1823, Dec. 2:** [Monroe Doctrine](http://avalon.law.yale.edu/19th_century/monroe.asp) [http://avalon.law.yale.edu/19th\_century/monroe.asp]

# Monroe on Recognition of the Independent States of South America

Below is an excerpted and annotated version of President Monroe's March 11, 1822, response to a House resolution introduced January 29 (included beneath President Monroe's message). All of the language in the excerpt is from the original, except for the annotations in parentheses, which define words in italics or provide additional information. Periods of ellipsis indicate gaps in the edited text. Anyone desiring the full text should consult the ["Journal of the Senate of the United States of America, 1789-1873" for Monday, March 11, 1822](http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sj01170))) [http://memory.loc.gov/cgi-bin/query/r?ammem/hlaw:@field(DOCID+@lit(sj01170))]

## **President Monroe's Message:**

In transmitting to the House of Representatives the documents called for by the resolution of that House, of the 30th January [see below], I consider it my duty to invite the attention of Congress to a very important subject....

The revolutionary movement in the Spanish provinces [possessions] in this hemisphere attracted the attention and excited the sympathy of our fellow citizens from its commencement [beginning]. This feeling was natural and honorable to them, from causes which need not be communicated to you [for reasons I don't need to tell you--Monroe understands that Americans who only recently won their independence from a European power tend to be sympathetic to revolutionary movements] ...Through the whole of this contest [the revolutionary conflicts] the United States have remained neutral....

This contest has now reached such a stage... that it merits the most profound consideration whether their right to the rank of independent nations, with all the advantages incident to it, in their intercourse with the United States, is not complete [a foregone conclusion]. Buenos Ayres [Argentina] assumed that rank by a formal declaration in 1816, and has enjoyed it since 1810, free from invasion by the parent country. The provinces composing the Republic of Colombia, after having separately declared their independence, were united by a fundamental law of the 17th of December 1819. A strong Spanish force occupied, at that time, certain parts of the territory within their limits, and waged a destructive war. That force has since been repeatedly defeated.... Chili declared independence in 1818, and has since enjoyed it undisturbed; and of late by the assistance of Chili and Buenos Ayres, the revolution has extended to Peru. Of the movement in Mexico our information is less authentic [reliable], but it is, nevertheless, distinctly understood, that the new government has declared its independence, and that there is now no opposition.... For the last three years the government of Spain has not sent a single corps of troops to any part of that country; nor is there any reason to believe it will send any in future....

Civil wars too often excite feelings which the parties cannot control.... The delay... in making a decision on this important subject, will... have afforded... proof to Spain, as it must have done to other powers, of the high respect entertained by the United States for her rights, and of their determination not to interfere with them. The provinces belonging to this hemisphere are our neighbors, and have, successively, as each portion of the country acquired its independence, pressed their recognition [asked the United States to recognize them] by an appeal to facts not to be contested, and which they thought gave them a just title to it. To motives of interest this government has invariably disclaimed all pretension [the United States has no self-interest at stake in these conflicts], being resolved to take no part in the controversy.... When we regard, then, the great length of time which this war has been prosecuted, the complete success which has attended it in favor of the provinces [revolutionaries in their home countries], the present condition of the parties, and the utter inability of Spain to produce any change in it, we are compelled to conclude that its fate is settled, and that the provinces which have declared their independence... ought to be recognized.

Of the views of the Spanish government on this subject, no particular information has been recently received.... The immense space between those powers, even those which border on the Atlantic, and these provinces, makes the movement an affair of less interest and excitement to them, than to us. It is probable, therefore, that they have been less attentive to its progress than we have been.

In proposing this measure, it is not contemplated to change thereby, in the slightest manner, our friendly relations with either of the parties, but to observe, in all respects, as heretofore, should the war be continued, the most perfect neutrality between them. Of this friendly disposition, an assurance will be given to the government of Spain.... The measure is proposed... in strict accord with the law of nations; that it is just and right as to the parties; and that the United States owe it to their station and character in the world, as well as to their essential interests, to adopt it. Should Congress concur in the view herein presented, they will doubtless see the propriety of making the necessary appropriations for carrying it into effect [*passing bills to cover the expense of recognizing the newly independent South American states*].

[*signed*] JAMES MONROE.

*The resolution to which President Monroe was responding:*

Mr. Nelson, [*a Republican*] of Virginia, submitted the following resolution...

Resolved, That the President of the United States be requested to lay before this House such communications as may be in the possession to the Executive from the agents of the United states with the governments south of the United States which have declared their independence; and the communications from the agents of such governments in the United States with the Secretary of State, as tend to shew [*show*] the political condition of those governments, and the state of the war between them and Spain, as it may be consistent with the public interest to communicate.

# Questions to Accompany President Monroe's Message on Recognition

1. In his response to the House resolution about the revolutionary movements in South America, Monroe mentions first the sympathy toward them of members of Congress and all Americans. Monroe says Americans are sympathetic "from causes which need not be communicated to you." What are those causes? Why does he put this point first in the speech? [He acknowledges the pressure from—while directly appealing to—the general population and members of Congress.]
2. What kinds of supporting evidence does Monroe give to prove that the revolutionary movements might deserve recognition? [The longevity of the revolutionary government, the state of war or lack of it?]
3. What reason(s) does Monroe give for delaying the U.S. decision on recognition?
4. To what events in the relationship between the revolutionary governments and the United States does Monroe refer? [Their requests for recognition.]
5. How does Monroe describe the official position of the United States up to the time of his message?
6. What does Monroe say are the most pressing reasons for recognizing the revolutionary movements?
7. How does Monroe describe the position of the Spanish government with regard to its South American possessions?
8. How does Monroe believe U.S. recognition of the revolutionary governments will affect relations with Spain?

# The Monroe Doctrine: A Close Reading

Each of the following sections of the Monroe Doctrine refers to a specific subject. NOTE: The divisions in the document below do not correspond to the paragraphs in the original document. In all other respects, this version adheres to the text. Read each section with the class. To what event(s) or condition(s) in U.S. history and/or its diplomacy and foreign relations does each section refer?

## Section 1

At the proposal of the Russian Imperial Government, made through the minister of the Emperor residing here, a full power and instructions have been transmitted to the minister of the United States at St. Petersburg to arrange by amicable negotiation the respective rights and interests of the two nations on the northwest coast of this continent. A similar proposal has been made by His Imperial Majesty to the Government of Great Britain, which has likewise been acceded to. The Government of the United States has been desirous by this friendly proceeding of manifesting the great value which they have invariably attached to the friendship of the Emperor and their solicitude to cultivate the best understanding with his Government. In the discussions to which this interest has given rise and in the arrangements by which they may terminate the occasion has been judged proper for asserting, as a principle in which the rights and interests of the United States are involved, that the American continents, by the free and independent condition which they have assumed and maintain, are henceforth not to be considered as subjects for future colonization by any European powers....

## Section 2

It was stated at the commencement of the last session that a great effort was then making in Spain and Portugal to improve the condition of the people of those countries, and that it appeared to be conducted with extraordinary moderation. It need scarcely be remarked that the results have been so far very different from what was then anticipated. Of events in that quarter of the globe, with which we have so much intercourse and from which we derive our origin, we have always been anxious and interested spectators. The citizens of the United States cherish sentiments the most friendly in favor of the liberty and happiness of their fellow-men on that side of the Atlantic. In the wars of the European powers in matters relating to themselves we have never taken any part, nor does it comport with our policy to do so.

## Section 3

It is only when our rights are invaded or seriously menaced that we resent injuries or make preparation for our defense.

## Section 4

With the movements in this hemisphere we are of necessity more immediately connected, and by causes which must be obvious to all enlightened and impartial observers. The political system of the allied powers is essentially different in this respect from that of America. This difference proceeds from that which exists in their respective Governments; and to the defense of our own, which has been achieved by the loss of so much blood and treasure, and matured by the wisdom of their most enlightened citizens, and under which we have enjoyed unexampled felicity, this whole nation is devoted. We owe it, therefore, to candor and to the amicable relations existing between the United States and those powers to declare that we should consider any attempt on their part to extend their system to any portion of this hemisphere as dangerous to our peace and safety.

## Section 5

With the existing colonies or dependencies of any European power we have not interfered and shall not interfere. But with the Governments who have declared their independence and maintain it, and whose independence we have, on great consideration and on just principles, acknowledged, we could not view any interposition for the purpose of oppressing them, or controlling in any other manner their destiny, by any European power in any other light than as the manifestation of an unfriendly disposition toward the United States. In the war between those new Governments and Spain we declared our neutrality at the time of their recognition, and to this we have adhered, and shall continue to adhere, provided no change

shall occur which, in the judgment of the competent authorities of this Government, shall make a corresponding change on the part of the United States indispensable to their security.

#### **Section 6**

The late events in Spain and Portugal [*events referred to in the next sentence*] shew [*show*] that Europe is still unsettled. Of this important fact no stronger proof can be adduced than that the allied powers [*the so-called "Holy Alliance" of Russia, Prussia, and Austria*] should have thought it proper, on any principle satisfactory to themselves, to have interposed by force in the internal concerns of Spain. To what extent such interposition may be carried, on the same principle, is a question in which all independent powers whose governments differ from theirs are interested, even those most remote, and surely none of them more so than the United States.

#### **Section 7**

Our policy in regard to Europe, which was adopted at an early stage of the wars which have so long agitated that quarter of the globe, nevertheless remains the same, which is, not to interfere in the internal concerns of any of its powers; to consider the government de facto as the legitimate government for us; to cultivate friendly relations with it, and to preserve those relations by a frank, firm, and manly policy, meeting in all instances the just claims of every power, submitting to injuries from none. But in regard to those continents circumstances are eminently and conspicuously different.

#### **Section 8**

It is impossible that the allied powers should extend their political system to any portion of either continent without endangering our peace and happiness; nor can anyone believe that our southern brethren, if left to themselves, would adopt it of their own accord. It is equally impossible, therefore, that we should behold such interposition in any form with indifference. If we look to the comparative strength and resources of Spain and those new Governments, and their distance from each other, it must be obvious that she can never subdue them. It is still the true policy of the United States to leave the parties to themselves, in hope that other powers will pursue the same course.

# Scoring Sheet for Monroe Doctrine Debate

As the debate occurs, use the space available for notes. Points can be split between teams at the teacher's discretion.

Debate Segment	Point Value	President James Monroe	Former President Thomas Jefferson	Secretary of State John Quincy Adams
<b>Opening Statement</b> (one minute max. per team)	15			
<b>Argument</b> (two minutes max. per team; one-minute break before next round for group meeting)	25			
<b>Rebuttal</b> (two minutes max. per team; one-minute break before next round for group meeting)	25			
<b>Question-and-Answer period</b> (three minutes max. per team, incl. responses. Responses limited to 30 seconds each. One-minute break before final round.)	15			
<b>Closing Statement</b> (one minute max. per team)	20			
		<b>Monroe</b>	<b>Jefferson</b>	<b>Adams</b>
<b>Total 30 minutes</b>	100			

# Documents for James Monroe

All of the documents below, unless otherwise specified, are from the Library of Congress American Memory website. The excerpts are all in the language of the original. Annotations in parentheses define terms in italics or add information. Some spelling and punctuation has been standardized. Abbreviations with the potential to be confusing have been replaced with full names.

## **Background**

From the James Monroe Biography on The American Presidency:

Monroe's policies, stressing the concept of limited government and strict construction of the U.S. Constitution, were shaped in accordance with the principles of the Jeffersonian Republican party. As a result of his experiences as a diplomat, he acquired a determination to free the United States from subservience to European powers. Hence he rejected British proposals in 1823 for joint action to protect the newly won independence of the Latin American states in favor of a unilateral policy declaration later known as the Monroe Doctrine.

...Monroe's greatest achievements as president lay in foreign affairs. Ably supported by his Secretary of State, John Quincy Adams, he made substantial territorial additions and gave American policy a distinctly national orientation. Monroe welcomed an opportunity to press Spain to cede Florida and define the boundaries of Louisiana. His chance came when Gen. Andrew Jackson invaded Florida in 1818. In pursuit of hostile Indians, Jackson seized the posts of St. Marks and Pensacola, acts that many persons regarded as violations of congressional war powers. In the cabinet, Adams, an expansionist, urged Jackson's complete vindication, while Crawford and Calhoun demanded that he be reprimanded for exceeding his instructions.

Monroe chose a middle course—the posts were restored to Spain, but the administration accepted Jackson's explanation that his action had been justified by conditions in Florida. The incident led Spain to cede Florida and define, favorably to American claims, the boundary of the Louisiana Purchase in the Adams-Onís Treaty negotiated in 1819.

...The revolutions in Spain's American colonies, which had begun in the Napoleonic era, had aroused great sympathy in the United States. Monroe, however, held back recognition until 1822, in spite of congressional pressure exerted by Henry Clay, an influential Congressman, after Spain had ratified the Adams-Onís Treaty. The South American revolutions that were going on during this period raised the possibility of intervention by the European powers linked in an alliance—commonly, but erroneously, known as the Holy Alliance (between Russia, Prussia, Austria and, in some versions, France)—to suppress these revolutions as they had done in Europe. Britain, prospering from newly opened Latin American trade, opposed this move. In 1823, British Foreign Minister George Canning proposed, through Richard Rush, the American minister, that the two nations jointly express their hostility to intervention. Monroe consulted Jefferson and Madison, who favored acceptance. The cabinet was divided, with only Adams strongly opposed.

Anxious to assert American independence in foreign policy, Monroe rejected the British offer, opting for a unilateral policy statement in his annual message of December 1823. In this statement, subsequently known as the **Monroe Doctrine**, he declared that the United States would regard any interference in the internal affairs of American states as an unfriendly act. At Adams' suggestion, Monroe included a declaration aimed at Russia that the United States considered the American continents closed to further colonization. While greeted with enthusiasm by Americans, Monroe's statement received little notice in Europe or South America, and it had no effect on European policy. England's declared opposition effectively blocked intervention by other nations.

## Documents

- 1817 November/December: To Chiefs and Warriors From President. The President of the United States has been informed about the murders and thefts committed by the hostile Indians in this part of the country (Florida). He has authorized General Jackson to... cause justice to be done....
- 1818 March: Message to Congress: Permission from Monroe to Jackson to Enter Florida.

I now lay before Congress all the information in the possession of the executive, respecting the war with the Seminoles, and the measures which it has been thought proper to adopt, for the safety of our fellow citizens, on the frontier exposed to their ravages. The enclosed documents show, that the hostilities of this tribe were unprovoked, the offspring of a spirit long cherished, and often manifested towards the United States, and that, in the present instance, it was extending itself to other tribes, and daily assuming a more serious aspect. As soon as the nature and object of this combination were perceived, the major general commanding the southern division of the troops of the United States, was ordered to the theatre of action, charged with the management of the war, and vested with the powers necessary to give it effect. ...It may be fairly presumed, that it will not be long before this tribe, and its associates, receive the punishment which they have provoked, and justly merited. As almost the whole of this tribe inhabits the country within the limits of Florida, Spain was bound, by the treaty of 1795, to restrain them from committing hostilities against the United States. We have seen with regret, that her government has altogether failed to fulfill this obligation, nor are we aware that it made any effort to that effect. When we consider her utter inability to check, even in the slightest degree, the movements of this tribe, by her very small and incompetent force in Florida, we are not disposed to ascribe the failure to any other cause. The inability, however, of Spain, to maintain her authority over the territory, and Indians within her limits, and in consequence to fulfill the treaty, ought not to expose the United States to other and greater injuries. When the authority of Spain ceases to exist there, the United States have a right to pursue their enemy, on a principle of self defense. In this instance, the right is more complete and obvious, because we shall perform only, what Spain was bound to have performed herself. ...Orders have been given to the general in command, not to enter Florida, unless it be in pursuit of the enemy, and in that case, to respect the Spanish authority, whenever it is maintained, and he will be instructed to withdraw his forces from the province, as soon as he shall have reduced that tribe, to order, and secure our fellow citizens, in that quarter, by satisfactory arrangements, against its unprovoked and savage hostilities in future.

- 1818 March: In response to a House resolution of the previous December, President Madison introduces Secretary Adams's report on the Independence of the Spanish Provinces. It's included here simply to indicate that recognition of the revolutionary governments in Spanish America was discussed as early as March 1818.
- 1818: Monroe Defends Acquisition of Florida in *Acquiring Florida*, 1818.

*Annotation:* ...Instead of apologizing for Jackson's conduct, President Monroe, in the following message, defended the Florida raid as a legitimate act of self-defense and informed Spain that it would either have to police Florida effectively or cede it to the United States. In 1819, Spain transferred Florida to the United States and the U.S. government agreed to honor \$5 million in damage claims by Americans against Spain.

*Text Excerpts:* Throughout the whole of those provinces [the Floridas], to which the Spanish title extends, the government of Spain has been scarcely felt.... Adventurers from every country, fugitives from justice, & absconding slaves, have found an asylum there. Several tribes of Indians, strong in the number of their warriors, remarkable for their ferocity, and whose settlements extend to our limits, inhabit those provinces. These different hordes of people, connected together, disregarding on the one side, the authority of Spain, and protected, on the other, by an imaginary line, which separates Florida from the United States, have violated our laws, prohibiting the introduction of slaves, have practiced various frauds on our revenue, and have committed every kind of outrage, on our peaceable citizens.... This country had, in fact, become the theatre, of every species of lawless adventure.... Men who... connect themselves with Savage communities, and stimulate them to war, which is always attended on their part with acts of barbarity the most shocking, deserve to be viewed in a worse light than the Savages.... The right of self defense never ceases.... In authorizing Major General [Andrew] Jackson to enter Florida, in pursuit of the Seminoles, care was taken not to encroach on the rights of Spain... Experience has clearly demonstrated that independent Savage communities, cannot long exist within the limits of a civilized population.... To civilize them, & even to prevent their extinction, it seems to be

indispensable, that their independence as communities should cease; & that the control of the United States over them, should be complete & undisputed. The hunter state, will then be more easily abandoned, and recourse will be had to the acquisition & culture of land, & to other pursuits tending to dissolve the ties, which connect them together as a savage community and to give a new character to every individual.

- 1821, March 5: Monroe's Second Inaugural Address.

The war between Spain and the colonies in South America... was considered at an early stage by my predecessor a civil war in which the parties were entitled to equal rights in our ports. This decision, the first made by any power... was in strict accord with the law of nations. Congress has invariably acted on this principle, having made no change in our relations with either party. Our attitude has therefore been that of neutrality between them, which has been maintained by the Government with the strictest impartiality. No aid has been afforded to either, nor has any privilege been enjoyed by the one which has not been equally open to the other party.... ..their public vessels have been received in our ports on the same footing; they have enjoyed an equal right to purchase and export arms, munitions of war, and every other supply, the exportation of all articles whatever being permitted under laws which were passed long before the commencement of the contest; our citizens have traded equally with both, and their commerce with each has been alike protected by the Government. Respecting the attitude which it may be proper for the United States to maintain hereafter between the parties, I have no hesitation in stating it as my opinion that the neutrality heretofore observed should still be adhered to. From the change in the Government of Spain and the negotiation now depending, invited by the Cortes and accepted by the colonies, it may be presumed, that their differences will be settled on the terms proposed by the colonies. Should the war be continued, the United States, regarding its occurrences, will always have it in their power to adopt such measures respecting it as their honor and interest may require.

- 1822 March/April: Political Condition of the Spanish Provinces of South America. The revolutionary movement in the Spanish provinces in this hemisphere attracted the attention and excited the sympathy of our fellow citizens...
- 1823, June 2: James Monroe to Thomas Jefferson.

Our ministers, ...were just about to sail for Spain, & So. America.... The moment is peculiarly critical, as respects (in regard to) the present state of the world, & our relations with the acting parties in it, in Europe & in this hemisphere, & it would have been very gratifying to me, to have had an opportunity of free communication with you, on all the interesting subjects connected with it. The French armies have entered Spain....

- 1823, October 17: Monroe to Thomas Jefferson.

I transmit to you two dispatches which were received from Mr. Rush (the American minister to Great Britain), while I was lately in Washington, which involve interests of the highest importance. They contain two letters from Mr. Canning (British minister to the U. S.) suggesting designs of the holy alliance against the independence of South America, & proposing ...cooperation, between Great Britain & the United States, in support of it, against the members of that alliance. The project aims ...first... at a mere expression of opinion... Many important considerations are involved in this proposition. 1st. shall we entangle ourselves at all in European politics, & wars, on the side of any power against others...? 2d. If a (any) case can exist in which a sound maxim (our successful policy of neutrality) may & ought to be departed from, is not the present instance, precisely that case? 3d. Has not the epoch (time) arrived when Great Britain must take her stand, either on the side of the monarchs of Europe, or of the U. S. & in ...favor of Despotism or of liberty, & may it not be presumed that, aware of that necessity, her government has seized on the present occurrence... to announce ...the commencement of that career (beginning of that policy). My own impression is that we ought to ...make it known, that we would view an (any) interference on the part of the European powers, and especially an attack on the Colonies, by them, as an attack on ourselves....

# Documents for John Quincy Adams

All of the documents below, unless otherwise specified, are from the Library of Congress American Memory website. The excerpts are all in the language of the original. Annotations in parentheses define terms in italics or add information. Some spelling and punctuation has been standardized. Abbreviations with the potential to be confusing have been replaced with full names.

## **Background**

Account of Adams's and Monroe's Conduct of Foreign Affairs on **The American Presidency**.

The First Seminole War and Spanish Florida, 1817-1818:

With the end of the War of 1812, tensions mounted and Monroe sent General Andrew Jackson, the hero of the Battle of New Orleans, and his Tennessee militia to the Florida border in 1817 to stop the raids and to catch runaway slaves. Exceeding his orders, Jackson invaded Florida in 1818, using the ambush of his troops—in which forty soldiers were killed—as the excuse. Jackson burned Seminole villages, hanged tribal leaders, captured Pensacola and deposed the Spanish governor. He even executed two British citizens whom he accused of having incited the Seminoles to commit atrocities against American settlers.

Because Jackson had acted without specific authority, Secretary of War John C. Calhoun urged Monroe to reprimand Jackson. Secretary of State John Quincy Adams came to Jackson's defense, however, and used the occasion to pressure Spain to sell all of Florida to the U.S. Preoccupied with revolts throughout its Latin American empire, Spain understood that the U.S. could seize all of Florida at will. In a brilliant series of diplomatic moves, Adams convinced Spain to sell Florida to the United States and to drop all its claims to the Louisiana Territory and Oregon. In return the U.S. agreed to relinquish its claims on Texas and assume responsibility for \$5 million owed to American citizens by the Spanish government. The resulting treaty, known as the Adams-Onís Treaty of 1819 (named after John Quincy Adams and the Spanish Minister Luis de Onís), was hailed as a great success, although some detractors thought that Adams should have obtained Texas in the bargain.

On another diplomatic front, Adams negotiated two important accords with Great Britain that resolved border disputes held over from the War of 1812. The Rush-Bagot Treaty of 1817 (named after Acting Secretary of State Richard Rush and British Minister Charles Bagot) demilitarized the Great Lakes, limiting each country to one 100-ton vessel armed with a single 18-pound cannon on Lake Chaplain and Lake Ontario. Two similar sized ships were permitted each nation on the other lakes. The Convention of 1818 fixed the present U. S.-Canadian border from Minnesota to the Rocky Mountains at the 49th parallel. The accords also resolved conflicting U.S. and British claims to Oregon with the agreement that both nations would jointly occupy the region for the next ten years.

The Monroe Doctrine:

With Spain out of Florida, and the western borders more-or-less quiet, Secretary of State Adams turned his attention to troubles in South and Central America. In 1821, Mexico won its independence from Spain; by 1822, Argentina, Chile, and Columbia had followed suit. Monroe quickly recognized their independence and encouraged the popular perception of Simon Bolivar (of Colombia) as the George Washington of Latin America. France, Austria, Russia, and Prussia began talking of a plan to help Spain recover her lost colonies. To counter the planned move, Britain proposed that the U.S. and England issue a joint declaration against European intervention in the Western Hemisphere. Adams insisted, however, on a separate American policy. On December 2, 1823, President Monroe presented a statement to Congress calling for an end of colonization in the Western Hemisphere by European nations. The proclamation, which was also aimed at Russian's Pacific coast settlements north of Oregon (in present-day Alaska), pledged that the U.S. in turn would not interfere in the affairs of European nations in their remaining New World colonies.

## Documents

- 1817: Exchange of Notes 1817: Proclamation (Relative to Naval Forces on the American Lakes), also known as the Rush-Bagot Treaty.

The naval force to be maintained upon the American lakes, by his majesty and the government of the United States, shall henceforth be confined to the following vessels on each side, that is –

- On Lake Ontario, to one vessel not exceeding one hundred tons burden, and armed with one eighteen pound cannon.
- On the upper lakes, to two vessels, not exceeding like burden each, and armed with like force.
- On the waters of Lake Champlain, to one vessel not exceeding like burden, and armed with like force.
- All other armed vessels on these lakes shall be forthwith dismantled, and no other vessels of war shall be there built or armed.

- 1818 March: In response to a House resolution of the previous December, President Monroe introduces Secretary Adams's report on the Independence of the Spanish Provinces. Included here not for its content but to show that the question of recognizing the revolutionary governments of Spanish America was under consideration for a long time. Interested students can view a series of documents following President Monroe's introduction by Adams and important figures such as Bernardo O'Higgins.
- 1818, October 20: Convention of 1818 between the U.S. and Great Britain. Set the 49th parallel as the U.S.-Canadian border from Minnesota to the Rocky Mountains.
- 1818, November 28: Letter from Secretary of State Adams to Spanish Minister to the United States Don Luis de Onís demonstrates Adams's negotiating style in the months before the Adams-Onís Treaty (the Adams-Onís Treaty was signed on February 22, 1819).

The right of the United States to the river Mississippi... is established beyond the power of further controversy.... You have been informed of the evidence inculcating (incriminating) the governors of those places, as (of) having utterly neglected to carry into effect the stipulation in the treaty of 1795, by which Spain was bound to restrain, by force, the Indians within her territories from committing hostilities against the United States... You have been informed that these were the real and only causes of the occupation of those places by the commander of the American forces.... ...it would be worse than superfluous to stipulate for restoring them to Spain in the very treaty by which they are to be ceded... to the United States.

- 1819, February 22: Transcontinental Treaty with Spain signed (ratified February 22, 1821).

Treaty of Amity, Settlement, and Limits Between the United States of America and His Catholic Majesty. 1819

### ARTICLE I

There shall be a firm and inviolable peace and sincere friendship between the United States and their citizens and His Catholic Majesty....

### ARTICLE II

His Catholic Majesty cedes to the United States, in full property and sovereignty, all the territories which belong to him, situated to the eastward of the Mississippi, known by the name of East and West Florida....

### ARTICLE III

The boundary-line between the two countries, west of the Mississippi, shall begin (the article goes on to specify the boundaries) ...The United States hereby cede to His Catholic Majesty, and renounce forever, all their rights, claims, and pretensions, to the territories lying west and south of the above-described line; and, in like manner, His Catholic Majesty cedes to the said United States all his rights, claims, and pretensions to any territories east and north of the said line....

### ARTICLE IV

To fix this line with more precision, and to place the landmarks which shall designate exactly the limits of both

nations, each of the contracting parties shall appoint a Commissioner and a surveyor, who shall meet before the termination of one year from the date of the ratification of this treaty at Nachitoches, on the Red River, and proceed to run and mark the said line....

#### ARTICLE V

The inhabitants of the ceded territories shall be secured in the free exercise of their religion, without any restriction; and all those who may desire to remove to the Spanish dominions shall be permitted to sell or export their effects, at any time whatever, without being subject, in either case, to duties. ARTICLE VI The inhabitants of the territories which His Catholic Majesty cedes to the United States, by this treaty, shall be incorporated in the Union of the United States as soon as may be consistent with the principles of the Federal Constitution, and admitted to the enjoyment of all the privileges, rights, and immunities of the citizens of the United States.

#### ARTICLE VII

The officers and troops of His Catholic Majesty, in the territories hereby ceded by him to the United States, shall be withdrawn, and possession of the places occupied by them shall be given within six months after the exchange of the ratifications of this treaty, or sooner if possible....

#### ARTICLE IX

The two high contracting parties... renounce all claims for damages or injuries which they, themselves, as well as their respective citizens and subjects, may have suffered until the time of signing this treaty.

#### ARTICLE XI

The United States, exonerating Spain from all demands in future, on account of the claims of their citizens to which the renunciations herein contained extend, and considering them entirely cancelled, undertake to make satisfaction for the same, to an amount not exceeding five millions of dollars.

#### ARTICLE XV

The United States, to give to His Catholic Majesty a proof of their desire to cement the relations of amity subsisting between the two nations, and to favor the commerce of the subjects of His Catholic Majesty, agree that Spanish vessels, coming laden only with productions of Spanish growth or manufactures, directly from the ports of Spain, or of her colonies, shall be admitted, for the term of twelve years, to the ports of Pensacola and St. Augustine, in the Floridas, without paying other or higher duties on their cargoes, or of tonnage, than will be paid by the vessels of the United States. During the said term no other nation shall enjoy the same privileges within the ceded territories. The twelve years shall commence three months after the exchange of the ratifications of this treaty. Done at Washington this twenty-second day of February, one thousand eight hundred and nineteen.

Signed:

JOHN QUINCY ADAMS

LUIS DE ONÍS.

NOTE: This treaty was concluded February 22, 1819. The ratifications were exchanged February 22, 1821, and proclaimed February 22, 1821. By the treaty of Saint Ildefonso, made October 1, 1800, Spain had ceded Louisiana to France and France, by the treaty of Paris, signed April 30, 1803, had ceded it to the United States. Under this treaty the United States claimed the countries between the Iberville and the Perdido. Spain contended that her cession to France comprehended only that territory which, at the time of the cession, was denominated Louisiana, consisting of the island of New Orleans, and the country which had been originally ceded to her by France west of the Mississippi. Congress passed a joint resolution, approved January 15, 1811, declaring that the United States, under the peculiar circumstances of the existing crisis, could not, without serious inquietude, see any part of this disputed territory pass into the hands of any foreign power; and that a due regard to their own safety compelled them to provide, under certain contingencies, for the temporary occupation of the disputed territory; they, at the same time, declaring that the territory should, in their hands, remain subject to future negotiation. An act of Congress, approved on the same day, authorized the President to take possession of and occupy all or any part of the territory lying east of the river Perdido and south of the State of Georgia and the Mississippi Territory, in case an arrangement had been, or should be, made with the local authority of the said territory, for delivering up the possession of the same, or any part thereof, to the United States, or in the event of an attempt to occupy the said territory, or any part thereof, by any foreign government.

- 1820, May 20: Extract of a Letter from Minister to Spain, John Forsythe, to JQ Adams on the Cessation of Florida.

Mr. Onís has published a memoir.... He accuses us of ambition and avarice (greed), and yet endeavors to show that the treaty of cession of Florida ought to be considered as a treaty of exchange of Florida for Texas....

- 1821, July 4: Warning Against the Search for Monsters to Destroy

America... has uniformly spoken... the language of equal liberty, of equal justice, and of equal rights. She has, in the lapse of nearly half a century, without a single exception, respected the independence of other nations while asserting and maintaining her own. She has abstained from interference in the concerns of others, even when conflict has been for principles to which she clings, as to the last vital drop that visits the heart... Wherever the standard of freedom and Independence has been or shall be unfurled, there will her heart, her benedictions and her prayers be. But she goes not abroad, in search of monsters to destroy. She is the well-wisher to the freedom and independence of all. She is the champion and vindicator only of her own. She will commend the general cause by the countenance of her voice, and the benignant sympathy of her example. She well knows that by once enlisting under other banners than her own, were they even the banners of foreign independence, she would involve herself beyond the power of extrication, in all the wars of interest and intrigue, of individual avarice, envy, and ambition, which assume the colors and usurp the standard of freedom. The fundamental maxims of her policy would insensibly change from liberty to force.... She might become the dictatress of the world. She would be no longer the ruler of her own spirit....

- 1822, February 25: JQ Adams to the Russian Minister to the United States

The President of the United States... has seen with surprise... the assertion of a territorial claim on the part of Russia, extending to the 51st degree of north latitude on this continent... The relations of the United States with His Imperial Majesty (the Russian Czar) have always been of the most friendly character; and it is the earnest desire of this government to preserve them in that state. It was expected, before any act which should define the boundary between the territories of the United States and Russia on this continent, that the same would have been arranged by treaty. To exclude the vessels (ships) of our citizens... has excited still greater surprise.

This ordinance affects so deeply the rights of the United States and of their citizens, that I am instructed to inquire whether you are authorized to give explanations of the grounds of right (legal grounds for your actions), upon principles of... the laws and usages of nations....

- 1823, July 22: Instructions from Adams to Middleton in Negotiating with Russia

The right of the United States from the 42nd to the 49th parallel... we consider as unquestionable, being founded (based), first, on the acquisition by the treaty of February 22, 1819, of all the rights of Spain; second by the discovery of the Columbia River, first from sea... and then by land by Lewis and Clark; and third, by the settlement at its mouth in 1811. This territory is to the United States of an importance which no possession in North America can be of to any European nation, not only as it is but the continuity of their possession from the Atlantic to the Pacific Ocean.... ...we are willing to agree to the boundary line within which the Emperor Paul had granted exclusive privileges to the Russian American Company, that is to say, latitude 55.

- 1823, August 18: JQ Adams on Greek Revolution

With regard to... recognition... the United States have recognized the fact of foreign sovereignty only when it was undisputed, or disputed without any rational prospect of success. In this manner the successive changes of government in many of the European States, and the revolutionary governments of South America, have been acknowledged. The condition of the Greeks is not yet such as will admit of the recognition upon these principles....

- 1823, November 7: John Quincy Adams's Account of the Cabinet Meeting of November 7, 1823

Washington, November 7th. – Cabinet meeting at the President's from half past one til four. Mr. Calhoun, Secretary of War, and Mr. Southard, Secretary of the Navy, present. The subject for consideration was, the confidential proposals of the British Secretary of State, George Canning, to R. Rush (minister to Great Britain),

and the correspondence between them relating to the projects (designs) of the Holy Alliance upon South America. There was much conversation, without coming to any definite point. The object of Canning appears to have been to obtain some public pledge from the Government of the United States, ostensibly against the forcible interference of the Holy Alliance between Spain and South America; but really or especially against the acquisition to the United States themselves of any part of the Spanish American possessions. Mr. Calhoun inclined to giving a discretionary power to Mr. Rush to join in a declaration against the interference of the Holy Allies, if necessary, even if it should pledge us not to take Cuba or the province of Texas; because the power of Great Britain being greater than ours to seize ...them, we should get the advantage of obtaining from her the same declaration we should make ourselves. I thought the cases not parallel. We have no intention of seizing either Texas or Cuba. But the inhabitants of either or both may exercise their primitive fights, and solicit a union with us. They will certainly do no such thing to Great Britain. By joining with her, therefore, in her proposed declaration, we give her a substantial and perhaps inconvenient pledge against ourselves, and really obtain nothing in return. Without entering now into the enquiry of the expediency of our annexing Texas or Cuba to our Union, we should at least keep ourselves free to act as emergencies may arise, and not tie ourselves down to any principle which might immediately afterwards be brought to bear against ourselves. Mr. Southard inclined much to the same opinion. The President was averse to any course which should have the appearance of taking a position subordinate to that of Great Britain.... I remarked that the communications recently received from the Russian Minister (that seemed to imply Russian interest in expanding their sphere of influence in the Northwest)... afforded, as I thought, a very suitable and convenient opportunity for us to take our stand against the Holy Alliance, and at the same time to decline the overture of Great Britain. It would be more candid, as well as more dignified, to avow our principles explicitly to Russia and France, than to come in... in the wake of the British man-of-war (ride in on Britain's coattails). This idea was acquiesced in (agreed to) on all sides....

- 1823, December 18: New York Citizens Petition of Sympathy for Greece, demonstrates public sympathy toward revolutionary movements.

The citizens... have, in common with their fellow-citizens throughout the United States, witnessed... the heroic efforts of the Greeks to rescue themselves from Turkish bondage.

- 1824: Convention with Russia, the conclusion of Adams's efforts in negotiating with Russia.

#### Article 1

It is agreed that in any part of... the Pacific Ocean... the respective citizens... shall neither be disturbed nor restrained either in navigation, or in fishing....

#### Article 3

It is moreover agreed that hereafter there shall not be formed by the citizens of the United States... any establishment upon the Northwest Coast of America... to the north of fifty-four degrees and forty minutes of north latitude; and that in the same manner there shall be none formed by Russian subjects or under the authority of Russia south of the same parallel.

# Documents for Thomas Jefferson

All of the documents below, unless otherwise specified, are from the Library of Congress American Memory website. The excerpts are all in the language of the original. Annotations in parentheses define terms in italics or add information. Some spelling and punctuation has been standardized. Abbreviations with the potential to be confusing have been replaced with full names.

## **Background**

Although Thomas Jefferson came to power determined to limit the reach of the federal government, foreign affairs dominated his presidency and pushed him toward Federalist policies that greatly contrasted with his political philosophy. The first foreign episode involved Jefferson's war with the Barbary pirates... The war ended with agreements that involved one last payment of tribute, at least to Tripoli. Jefferson's action on this matter caused him to rethink the need for a well-equipped navy and halted his move to reduce the force to a mere token size.

...When Jefferson learned that Spain had secretly ceded Louisiana to France in 1800, he instructed his ministers to negotiate the purchase of the port of New Orleans and possibly West Florida. Jefferson strategically made this move in order to insure that American farmers in the Ohio River Valley had access to the Gulf of Mexico via the Mississippi River – the river was a key to the farmers' economic well-being, as they needed a vent for their surplus grain and meat. Even before the French took over Louisiana, the Spaniards had closed the Mississippi River in 1802. While Jefferson was known to be partial to the French, having the Emperor Napoleon's driving interests for world domination next door was not an attractive prospect; thus, Jefferson acted swiftly.

...Although Jefferson understood that the U.S. Constitution said nothing about the purchase of foreign territory, he set aside his strict constructionist ideals to make the deal...

...Several weeks after buying Louisiana, Napoleon declared war on Great Britain. At first, the European fighting benefited the United States since Americans functioned as the merchants carrying supplies to the warring powers. Consequently, between 1803 and 1807, total U.S. exports jumped from \$66.5 million to \$102.2 million.... Then, the bottom fell out of the trade industry as England and France each independently outlawed virtually all American commerce with their opponent.

The British navy also began seizing American ships with cargoes bound for Europe and impressing American sailors into the Royal Navy.... Cries for war erupted throughout the nation.

Jefferson banned all British ships from U.S. ports, ordered state governors to prepare to call up 100,000 militiamen, and suspended trade with all of Europe. He reasoned that U.S. farm products were crucial to France and England and that a complete embargo would bring them to respect U.S. neutrality. By spring 1808, however, the Embargo Act that was passed by Congress in December 1807 had devastated the American economy.... Eventually, the trade war would propel America into a fighting war with England during the administration of Jefferson's successor, James Madison.

## **Documents**

- 1802, April 18: The Affair of Louisiana

To the U.S. Minister to France (ROBERT R. LIVINGSTON), Washington

The cession of Louisiana and the Floridas by Spain to France works most sorely on the U.S.... Of all nations... France is the one which hitherto has offered the fewest points on which we... conflict... and the most points of a communion of interests.... There is on the globe one single spot, the possessor of which is our natural and habitual enemy. It is New Orleans, through which the produce of three-eighths of our territory must pass to market... The day that France takes possession of N. Orleans... we must marry ourselves to the British fleet

and nation. We must turn all our attentions to a maritime force.... And will a few years possession of N. Orleans add equally to the strength of France? She may say she needs Louisiana for the supply of her West Indies. ...If France considers Louisiana however as indispensable... she might perhaps be willing to look about for arrangements which might reconcile it to our interests. If anything could do this it would be the ceding to us the island of New Orleans and the Floridas. This would certainly in a great degree remove the causes of jarring and irritation between us....

- 1803, January 13: Crisis on the Mississippi

To the Special Envoy to France (JAMES MONROE), Washington

The agitation of the public mind on occasion of the late suspension of our right of deposit at N. Orleans is extreme...in the federalists generally and especially those of Congress the object is to force us into war.... Something sensible therefore was become necessary; and indeed our object of purchasing N. Orleans and the Floridas is a measure liable to assume so many shapes, that no instructions could be squared to fit them, it was essential then to send a minister extraordinary to be joined with the ordinary one, with discretionary powers, first however well impressed with all our views and therefore qualified to meet and modify to these every form of proposition which could come from the other party. This could be done only in full and frequent oral communications. Having determined on this, there could not be two opinions among the republicans as to the person. You possess the unlimited confidence of the administration ...We shall get (It looks as if we might get) entangled in European politics, and... be much less happy and prosperous. This can only be prevented by a successful issue to your present mission. ...The allowance therefore will be in this and all similar cases, all the expenses of your journey and voyage, taking a ship's cabin to yourself, 9,000 dollars a year... As to the time of your going you cannot too much hasten it, as the moment in France is critical....

- 1803, August 12: Jefferson's Expansionism, The Louisiana Purchase

To John C. Breckinridge, Monticello

On the subject of Louisiana... Our information as to the country is very incomplete. We have taken measures to obtain it (information) in full... in time for Congress. The boundaries, which... admit... question (are in question), are the high lands on the western side of the Mississippi enclosing all its waters, the Missouri of course, and terminating in the line drawn from the northwestern point of the Lake of the Woods to the nearest source of the Mississippi, as lately settled between Gr Britain and the U S. We have some claims, to extend on the sea coast Westwardly to the Rio Norte or Bravo, and better, to go Eastwardly to the Rio Perdido, between Mobile & Pensacola, the ancient boundary of Louisiana. These claims will be a subject of negotiation with Spain, and if, as soon as she is at war, we push them strongly with one hand, holding out a price in the other, we shall certainly obtain the Floridas, and all in good time. In the meanwhile, without waiting for permission, we shall enter into the exercise of the natural right we have always insisted on with Spain, to wit, that of a nation holding the upper part of streams, having a right of innocent passage thro' them to the ocean. ...propositions are made to exchange Louisiana, or a part of it, for the Floridas. But, as I have said, we shall get the Floridas without, and I would not give one inch of the waters of the Mississippi to any nation.... These federalists see in this acquisition the formation of a new confederacy.... The future inhabitants of the Atlantic & Mississippi States will be our sons. This treaty must of course be laid before both Houses.... They, I presume, will see their duty to their country in ratifying & paying for it, so as to secure a good which would otherwise probably be never again in their power. But I suppose they must then appeal to the nation for an additional article to the Constitution....

- 1816: Jefferson to Monroe on South America

On the question of our interest in their independence, were that alone a sufficient motive of action, much may be said on both sides. When they are free, they will drive every article of our produce from every market, by underselling it, and change the condition of our existence, forcing us into other habits and pursuits. We shall indeed, have in exchange some commerce with them, but in what I know not, for we shall have nothing to offer which they cannot raise cheaper; and their separation from Spain seals our everlasting peace with her. On the other hand, so long as they are dependent, Spain, from her jealousy, is our natural enemy, and always in either open or secret hostility with us. These countries, too, in war will be a powerful weight in her scale, and, in peace, totally shut to us. Interest, then, on the whole, would wish their independence, and justice makes the

wish a duty. They have a right to be free, and we a right to aid them, as a strong man has a right to assist a weak one assailed by a robber or murderer.

- 1818: Revolt in South America

I enter into all your doubts as to the event of the revolution of South America. They will succeed against Spain. But the dangerous enemy is within their own breasts. Ignorance and superstition will chain their minds and bodies under religious and military despotism. I do believe it would be better for them to obtain freedom by degrees only; because that would by degrees bring on light and information, and qualify them to take charge of themselves understandingly; with more certainty, if in the meantime, under so much control as May keep them at peace with one another. Surely, it is our duty to wish them independence and self-government, because they wish it themselves, and they have the right, and we none, to choose for themselves; and I wish, moreover, that our ideas may be erroneous and theirs prove well-founded. But these are speculations which we may as well deliver over to those who are to see their development.

- 1820: Independence of SPANISH AMERICA

We go with you all lengths in friendly affections to the independence of South America. But an immediate acknowledgment of it calls up other considerations. We view Europe as covering at present a smothered fire, which may shortly burst forth and produce general conflagration. From this it is our duty to keep aloof. A formal acknowledgment of the independence of her Colonies would involve us with Spain certainly, and perhaps, too, with England, if she thinks that a war would divert her internal troubles. Such a war would hurt us more than it would help our brethren of the South; and our right May be doubted of mortgaging posterity for the expenses of a war in which they will have a right to say their interests were not concerned.

- 1823, February 21: Thomas Jefferson to James Monroe (NOTE: This letter does not focus on any of the events in diplomacy on which this lesson centers. It's rather a deeply personal letter demonstrating the close relationship between Jefferson and Monroe.)

Your society during the little time I have left would have been the chief comfort of my life. Of the 3 portions into which you have laid off your lands here, I will not yet despair but that you may retain that on which your house stands.... You have had some difficulties and contradiction to struggle with in the course of your administrations but you will come out of them with honor and with the affections of your country. Mine to you have been & ever will be constant and warm. Th. J.

- 1823, April 14: James Monroe to Thomas Jefferson

Respecting Cuba the idea... of a mutual guarantee of it to Spain by the United States & Great Britain... Shall it be of a character to prevent the people of the Island, from following the examples of Columbia, Buenos Ayres &c, and would Spain accept it, if it did not extend to that object (contain a provision forbidding becoming independent), or would England unite in (agree with) it? The situation of Mexico is peculiar in our hemisphere. When a nomination of minister to the new govt. was made Iturbide alone (only Agustín de Iturbide who led a successful rebellion against Spain and then set himself up as dictator of an independent Mexico in 1821. He immediately faced his own rebellion and was forced to abdicate in 1823) had sent a minister here. To have nominated to (recognized) the other govt. (revolutionary governments) & not to Mexico would have been... felt (noticed) by the holy alliance....

- 1823, June 2: James Monroe to Thomas Jefferson

Our ministers... were just about to sail for Spain, & So. America.... The moment is peculiarly critical, as respects (in regard to) the present state of the world, & our relations with the acting parties in it, in Europe & in this hemisphere, & it would have been very gratifying to me, to have had an opportunity of free communication with you, on all the interesting subjects connected with it. The French armies have entered Spain....

- 1823, June 11: Thomas Jefferson to James Monroe

I have ever deemed it fundamental for the US. never to take active part in the quarrels of Europe. Their political interests are entirely distinct from ours. Their mutual jealousies, their balance of power, their complicated alliances, their forms and principles of government, are all foreign to us. They are nations of eternal war... Of the brethren (as far as the countries) of our own hemisphere, none are yet... in a shape... to war against us. And the foothold which the nations of Europe had in... America is slipping from under them, so that we shall soon be rid of their neighborhood. Cuba alone seems at present to hold up a speck of war to us. Its possession by Great Britain would indeed be a great calamity... But, should she take it, I would not immediately go to war for it; because the first war on other accounts will give it to us; or the island will give itself to us, when able to do so. ...no duty therefore calls on us to take part in the present war of Europe, and a gold harvest offers itself in reward for doing nothing... and ought to avail ourselves of the happy occasion of procuring and cementing a cordial reconciliation with her (Spain), by giving assurance of every friendly office which neutrality admits, and especially against all apprehension (fear) of our ...meddling in the quarrel with her colonies. ...That England is playing false with Spain cannot be doubted.

- 1823, August 18: Monroe to Thomas Jefferson

Our accounts from South America, & Mexico indicate that those people must undergo great difficulties before they can attain a firm establishment on a republican basis. The great defect is the ignorance of the people, by means whereof, they are made in the hands (become victims) of military adventurers, & priests, the instruments of their own destruction. Time, however, with some internal convulsions, and the form of our example, will gradually mature them....

- 1823, October 17: Monroe to Thomas Jefferson

I transmit to you two dispatches which were received from Mr. Rush (the American minister to Great Britain), while I was lately in Washington, which involve interests of the highest importance. They contain two letters from Mr. Canning (the British minister to the U. S.) suggesting designs of the holy alliance against the independence of South America, & proposing ...cooperation, between Great Britain & the United States, in support of it, against the members of the that alliance. The project aims in a first instance at a mere expression of opinion.... Many important considerations are involved in this proposition. 1st. shall we entangle ourselves at all in European politics, & wars, on the side of any power against others...? 2d. If a (any) case can exist in which a sound maxim (our successful policy of neutrality) may & ought to be departed from, is not the present instance, precisely that case? 3d. Has not the epoch (time) arrived when Great Britain must take her stand, either on the side of the monarchs of Europe, or of the U. S. & in ...favor of Despotism or of liberty, & may it not be presumed that, aware of that necessity, her government has seized on the present occurrence...to announce...the commencement of that career (beginning of that policy, that is, in favor of liberty). My own impression is that we ought to...make it known, that we would view an (any) interference on the part of the European powers, and especially an attack on the Colonies, by them, as an attack on ourselves...

- 1823, October 24: Thomas Jefferson to James Monroe

The question presented by the letters you have sent me (concept later formulated as the Monroe Doctrine), is the most momentous which has been ever offered to my contemplation since that of Independence. That made us a nation, this sets our compass and points the course which we are to steer through the ocean of time opening on us. Our first and fundamental maxim (rule) should be never to entangle ourselves in the broils of Europe. Our second never to suffer Europe to intermeddle with Cis-Atlantic affairs (affairs on this side of the Atlantic). America, North and South has a set of interests distinct from those of Europe, and peculiarly her own. She should therefore have a system of her own, separate and apart from that of Europe. ...I am clearly of Mr. Canning's opinion, that it (the proposal to express an opinion against European meddling in the Americas) will prevent instead of provoking war. With Great Britain withdrawn from their scale and shifted into that of our two continents (on our side), all Europe combined would not undertake such a war. For how would they propose to get at either enemy without superior fleets? Nor is the occasion to be slighted which this proposition offers of declaring our protest (the great opportunity we have to protest) against the atrocious violations of the rights of nations, by the interference of any one in the internal affairs of another... begun by Bonaparte (Napoleon, the Emperor of France) and now continued by the equally lawless Alliance, calling itself Holy.

- 1823 December: James Monroe to Thomas Jefferson (dated "Received December 11")

Shortly after the receipt of yours (your letter) of the 24th of October... the Russian minister... communicated (sent) ...an extract (part) of a letter from his government in which the conduct of the allied powers in regard to Naples, Spain, & Portugal was reviewed and their policy explained distinctly avowing (declaring) their determination to crush all revolutionary movements & thereby to preserve order in the civilized world.... ...it leaves little doubt that some project against the new governments is contemplated (by the so-called Holy Alliance and France). In what form is uncertain. It is hoped that the sentiments expressed in the message, will give a check to it. We certainly meet in full extent (I agree fully with) the proposition of Mr. Canning (to declare the independent countries of the Americas off limits to European interference) ...Had we moved in the first instance in England (immediately made a joint declaration with Great Britain), ...our union with her, being masked, might have produced irritation.... ...it is probable that it would have been inferred that we acted under her influence, & at her instigation, & thus have lost credit as well with our southern neighbors, as with the allied powers. There is some danger that the British government when it sees the part we have taken, may endeavor to throw the whole burden on us....

# Written Document Analysis Worksheet

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<b>6</b>	<p><b>DOCUMENT INFORMATION (many possible answers here):</b></p> <p>A. List three things the author said that you think are important:</p> <p>B. Why do you think this document was written?</p> <p>C. What evidence in the document helps you know why it was written? Quote from the document.</p> <p>D. List two things the document tells you about life in the United States at the time it was written.</p> <p>E. Write a question to the author that is left unanswered by the document.</p>												