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Doing school history as portrayed in assessment tasks found in the European expansion and conquest in the 15th to 18th centuries units contained in a sample of grade 10 South African CAPS-compliant history textbooks

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1. INTRODUCTION

THE PROBLEM-PURPOSE STATEMENT, RESEARCH FRAME, RATIONALE AND RESEARCH QUESTION

In this chapter I aim to provide a brief context for my research through a presentation of my problem-purpose statement, an introduction to Bernstein's pedagogic device as my research framework and the pedagogic device's place as a site of contestation over the notion of what it means to *do history*. This will be followed by an explanation of the rationale behind my research. The chapter concludes with a statement of what my research topic is through the presentation of a focused research question and its accompanying research sub-questions.

1.1 Problem-purpose statement

There has been an upsurge in History textbook research in South Africa since the 1990s with continued growth into the 2010s (Bertram and Wasserman, 2014). The majority of these studies have been empirical studies of textbooks within the FET phase and particularly on Grade 11 textbooks (Ibid.). This increase in textbook research in South Africa is understandable in light of the learned opinion that sees textbooks as vital resources in shaping history education in South Africa (Morgan, 2010). But few of these studies have focused on the Grade 10 textbooks or on the issue of assessment tasks as vehicles of the historical construct (Ibid.).

Prominent South African history textbook researchers such as Morgan (2010) and Morgan and Henning (2011, 2013) have conducted studies into the nature of the construct of history in the National Curriculum Statement (NCS) and its consequent expression or lack thereof in South African history textbooks. In using a tool for the analysis of Grade 11 history NCS textbooks which they created, they observed that some textbooks compromised the intellectual project of history education as espoused by the *doing school history* approach. This approach sees history as a vehicle for the teaching of critical literacy and enquiry skills, as well as promoting a state-sanctioned political agenda. However, Morgan and Henning's research focused on a variety of aspects of textbooks, and not specifically assessment tasks. This has led to my concern as to whether assessment tasks in new Grade 10 CAPS-compliant history textbooks accurately reflect the construct of *doing school history* expressed in the Grade 10 CAPS for history. If we presume that history education in South Africa today does promote critical literacy and enquiry, then textbook assessment tasks should be prime

vehicles for this. For this reason I have chosen to focus my research on history textbook assessment tasks and not the text in general.

An important aim of this study is to clarify what construct of *doing school history* is reflected in assessment tasks found in the *European expansion and conquest in the 15th to 18th centuries* units of a sample of CAPS-compliant Grade 10 history textbooks and whether this construct aligns with that proposed in the Grade 10 History CAPS. I want to illustrate how the purpose of the *doing school history* construct pre-supposes both an academic and a political project. The purpose of the academic project is to mediate the cognitive skills of doing history as well as the knowledge dimensions, and the purpose of the political project is to put history to use in the curriculum to mediate particular political messages or agendas.

I will therefore conduct an analysis of the extent of construct alignment between the Grade 10 History CAPS and the textbook assessment tasks by establishing a set of criteria, drawn from sources ranging from the Grade 10 History CAPS, Grade 10 CAPS-compliant textbooks and accompanying teacher guides, the work of Morgan and Henning, as well as specific criteria drawn from the Revised Bloom's Taxonomy and Wertsch's (2002) conceptualisation of History and Collective Memory.

1.2 Research frame

There has been much debate within the historical community in the last fifty years with regards to what the nature of history is as an academic field of study. This debate has been keenly expressed in what Bernstein (2002) has called the field of production, or the field of enquiry through which the knowledge of history is produced. Amongst historians there is a clash between 'traditionalist' historians like EH Carr, and the 'post-modernists' represented by the works of Alun Munslow and Hayden White, amongst others. The 'traditionalists' (Munslow has referred to them as modernists or empirical-reconstructionists) view history as essentially an empirical-analytical undertaking. These 'traditionalists' see the role of the historian as selector and interpreter of historical facts to build an understanding of the past. It is this paradigm which has dominated the debate in the field of production. The 'post-modernists' have countered the 'traditionalist' view by taking the stance that history is a literary artefact (Munslow, 2011). Post-modernists argue that history is written as a complex narrative discourse, moulded by the rhetoric, metaphors and ideological strategies of explanation employed by the historian. As such, "... history is as much invented as it is found" (Ibid. p.9).

A debate parallel to that in the field of production, centred on the nature of school history, has unfolded in the field of recontextualisation (Bernstein, 2002). The field of recontextualisation in South Africa consists of education policy-makers and curriculum, textbook and assessment developers whose responsibility it is to reorganise the knowledge in the field of production in such a way that it can be learned in schools; i.e. to recontextualise disciplinary knowledge for school purposes. The debate within the field of recontextualisation has been expressed in the process of curriculum change that has characterised education in South Africa over the last twenty years since the collapse of Apartheid. More specifically, with curriculum change has come a re-examination of the nature of history as a school subject. Briefly, we have in the last twenty years seen a shift from school history as a narrative of events from the past dictated to learners by teachers, to an alternative tradition that has emphasised constructivist modes of learning and teaching and a focus on building historical skills; in other words a shift from *knowing history* to *doing history* (Bertram, 2008).[1]

The very recent adoption, in 2011, of the Curriculum and Policy Statement (CAPS) for history has again resulted in a recontextualisation of what it means to *do history* in schools. This lack of clarity about what construct of history is appropriate for South African schools, has also by consequence led to a lack clarity about what it means to *do history* and whether this construct is reflected in the assessment tasks that learners are asked to do.

1.3 Rationale

As a teacher in a school that provides an education to many learners from poor communities, I understand the necessity of using textbooks as informational and pedagogical resources in my teaching. And at times I tend to have an uncritical understanding of and approach to using textbooks. As such, I believe that this study will deepen my own understanding of my practice as a history teacher, guiding me to a more critical approach to resource selection that will ultimately position my learners for greater academic success. I also hope this study can lead to an awareness of how history textbooks can be improved as learning tools in a country where textbooks are often the only source of knowledge regarding school subjects, bar the

[1] In Bernstein's writing on the pedagogic device (2002) he discusses a third field; namely the field of reproduction as represented by the sphere of the classroom where an interpretation of curriculum, textbook and assessment by teacher and learner occurs. Bertram (2008), through classroom-based research and task-analysis has spent much time researching history in this field. However, my study primarily focuses on the fields of production and recontextualisation.

teacher, that learners have access to (Morgan, 2010). Paxton (1999) stresses this point when he states that the improvement of pedagogical resources like textbooks should be a goal of great importance for those who really care about history education (p. 316). This research will also provide me with an opportunity to stop and reflect on my practice as a teacher of history; a rare privilege given the 'hurly-burly' of school life where moments of reflection in depth are all too few and far between; reflection on the nature of history as a discipline and how it is presented and assessed within textbooks.

1.4 Research question

Therefore, my topic for research is; *'Doing school history as portrayed in assessment tasks found in the European expansion and conquest in the 15th to 18th centuries units contained in a sample of Grade 10 South African CAPS-compliant history textbooks'*.

As such, the critical question that frames this research is: *What understanding of 'doing school history' is portrayed in assessment tasks in a sample of Grade 10 history textbooks?*

In order to further explore the research question, the following sub-questions will guide the research:

- What does doing history mean in the field of production?

- What does doing school history mean in the field of recontextualisation at the level of the History CAPS?

- What does doing school history mean in the field of recontextualisation at the level of assessment tasks?

- What does doing school history mean at the level of the textbook assessment task?

In this chapter I have aimed to briefly contextualise my research through a presentation of my problem-purpose statement, an introduction to Bernstein's pedagogic device as my research framework and the pedagogic device's place as a site of contestation over the notion of what it means to *do history*. This was followed by an explanation of the rationale behind my research, and has been concluded with a statement of what my research topic is through the presentation of a focused research question and its accompanying research sub-questions.

The review of literature (chapter two) that follows will seek to answer the first two research sub-questions through an in-depth analysis of what it means to *do history* in the first two fields of Bernstein's pedagogic device; the fields of production and recontextualisation. This will enable a clear formulation of the construct of *doing school history*. The methodology chapter will then define how the construct of *doing school history* is to be identified in the data. The data presentation chapter will determine whether the characteristics of the construct of *doing school history* are present in the data, and the discussion chapter will seek to discuss the significance of my findings in relation to the critical question for research; *what understanding of 'doing school history' is portrayed in assessment tasks in a sample of Grade 10 history textbooks?*

2. REVIEW OF LITERATURE

WHAT IS HISTORY WITHIN THE FIRST TWO FIELDS OF BERNSTEIN'S PEDAGOGIC DEVICE?

2.1 Introduction

This review of literature begins by outlining Bernstein's pedagogic device, as it provides the frame to situate this study within the educational landscape. To lay out Bernstein's pedagogic device I draw on the works of Bernstein (1996, 2002) himself, Singh (1999), Hugo and Bertram (2009) and Hugo (2013). I broadly describe Bernstein's theory of the process of knowledge creation through an examination of his three pedagogic fields; namely the fields of production, recontextualisation and reproduction.

From this foundation I enter into a deeper discussion of history in the field of production, exploring the debates and contestations. The main contestation is between historians considered empirical-reconstructionists (Carr) and those considered post-modernists (Munslow, Jenkins and White). I also attempt to uncover the influence that the debates in the field of production have had on the construct of school history within the field of recontextualisation.

As the focus of this study is on the extent of the portrayal between the construct of history as proposed in the Grade 10 History CAPS and assessment tasks within Grade 10 History CAPS-compliant textbooks, an analysis of the nature of school history within the field of recontextualisation dominates this literature review.

Firstly, I attempt to define the connection or disconnection between the fields of production and recontextualisation in an effort to understand how the creators of knowledge in the field of production influence what and how new knowledge is determined in the field of recontextualisation. Here I draw predominantly on the works of Paxton (1999), Osborne (2004) and Hugo (2013).

I then discuss the two broad traditions of 'what is school history?' The first tradition focuses on the idea of *knowing history* (Bertram, 2008), which is a position very much in line with that of the positivists or empiricists in the field of production. This approach sees history as a purely empirical undertaking which stresses the gathering of facts as vital to building an accurate picture of the past. In the *knowing* history classroom teachers are content experts

whose job it is to provide uncritical learners with as many facts as possible about the past. The purpose of assessment is then to gauge how many facts the learners have retained. This approach to teaching and learning history has been out of favour in South Africa since 1994, with the curriculum change to outcomes-based education.

The other tradition is the notion of *doing history* (Bertram, 2008; Seixas, 1999; Barton and Levstick, 2003); an approach reflective of the empirical-reconstructionists in the field of production. This approach continues to acknowledge the importance of historical facts, but there is an acknowledgment that these facts need to be analysed in a critical way in order for the historian to build a possible picture of the past. Within the *doing* history classroom unique skills of historical enquiry are taught, rather than an uncritical collection and regurgitation of facts. The *doing history* approach has come to dominate teaching and learning history within the fields of recontextualisation and reproduction both internationally, and in South Africa both before (under the Joint Matriculation Board and the Natal Education Department) and after 1994. However, I also argue that *doing* and *knowing* history are not mutually exclusive. The ability of learners to *know* history has a place within the *doing school history* construct.

The discussion of 'what is school history?' requires the further development of an understanding of what the *purpose* of school history is (Bertram, 2008; Paxton, 1999; Osborne, 2004; Morgan and Henning, 2011; Morgan, 2010; Hugo, 2013; Hugo and Bertram, 2009; Seixas, 1999) and how it differs from the purpose of so-called academic history within the field of production. Another facet of history I examine, both within the fields of production and recontextualisation, is its multi-disciplinary nature (Thornton and Barton, 2010).

My purpose is to build as complete an understanding as possible of the construct of *doing school history* and to determine to what extent this construct is evident within the South African Grade 10 History CAPS document. This is vital in order to determine the *construct validity* (Wiliam, 2010) of assessment tasks contained in the Grade 10 textbook chapters under investigation. Briefly, construct validity is defining a discipline-construct in order to create tasks that provide a valid assessment of a learner's ability to operate within the discipline-construct (Wiliam, 2010, p.257).

I then shift the discussion to the role of curricula and textbooks as products of the field of recontextualisation designed to transmit a particular historical construct. This entails a discussion of the purpose of curricula and textbooks (Morgan, 2010; Morgan and Henning,

2011; Bertram, 2008; Hugo and Bertram, 2009; Paxton, 1999 and Osborne, 2004) as learning and teaching resources, as well as the importance of textbooks as educational resources within the South African and global context. I outline recent history textbook analysis research (Morgan, 2010; Morgan and Henning, 2011; Bertram, 2008) that has been done in South Africa, which has sought to uncover the nature of school history in NCS textbooks, as well as the ability of these textbooks to appropriately recontextualise the curriculum.

As this research focuses on the construct of history portrayed in history textbook assessment tasks, it is important to spend some time understanding the nature of assessment in history. Here the work of Dylan Wiliam (2010) and his notion of construct validity in assessment, in conjunction with the Grade 10 History CAPS, and theorists such as Barton and Levstick (2003) and Seixas (1999) on the construct of *doing history* in schools, provides a useful conceptual bridge to the aim of this study; namely understanding the extent to which the construct of school history represented in the Grade 10 History CAPS is reflected in textbook assessment tasks.

The literature review concludes by introducing the history topic focus of the research and the rationale behind it. I have chosen to work within the *European expansion and conquest in the 15th to 18th centuries* content area of the Grade 10 History CAPS. I have made this decision based on certain research task restrictions as well as my familiarity with this content. I provide some detail on what this content area entails, how it fits into the FET History CAPS as a whole, as well as the purpose of its inclusion in the curriculum.

2.2 Bernstein's Pedagogic Device- a broad overview

I begin by outlining the process whereby historical knowledge is produced and recontextualised for consumption within schools, or, as Hugo (2013) states, to "explore how the educational system takes a highly specialised esoteric knowledge and transforms it into digestible portions students at school can handle" (p. 131). As such, Bernstein provides us with a useful theoretical framework for understanding this process of pedagogising knowledge (Singh, 1999). This framework is what Bernstein (2002) refers to as his *pedagogic device*, and it enables us to analyse the processes by which discipline specific knowledge is converted into school knowledge. The pedagogic device constitutes the ordering or disordering principles of knowledge pedagogising, and enables an understanding of how "the privileging texts" (Singh, 1999, p.573) of school knowledge are generated.

Bernstein (2002) identified three different pedagogic fields: the fields of production, recontextualisation and reproduction.

Bernstein's (2002) field of production refers to the space in which disciplinary knowledge is constituted in scientific research communities, or literary or artistic communities located in higher education institutions or research institutes. This academic knowledge is highly specialised and encoded in complex symbolic forms, and needs to be decoded or pedagogised to become accessible to those outside the specialised domain. This decoding process normally occurs within the field of recontextualisation (Singh, 1999).

In the case of the discipline of history, the field of production is a site of contestation between academics operating within this discipline. This can be illustrated by the debate within the field of historical knowledge production over the last fifty years (Munslow, 2011) over the nature of history, framed by the question, 'What is history?' This debate is explored more fully later on in the chapter.

The second of Bernstein's pedagogic fields is the field of recontextualisation. Within this broad field he identifies two sub-fields; the Official Recontextualising Field (ORF) and the Pedagogic Recontextualising Field (PRF) (Singh, 1999, p. 576). The ORF refers to specialised state departments or sub-agencies along with their researchers and subject advisors. The PRF refers to university education departments, specialised education media and publishing houses together with their advisers and writers (Ibid. p.576). The agents in both sub-fields of the field of recontextualisation are situated between the fields of production and reproduction. They need to look 'upstream' at the debates, contestations and latest discoveries in the field of production, as well as 'downstream' at the developments and capabilities of teachers and learners in the field of reproduction, and then also be involved in the contestations within their own field.

Contestations between the PRF and the ORF can occur over control of the rules or procedures for constructing pedagogic texts and practices. A contest I am interested in is centred on the pedagogising relationship between the Official Recontextualising Field (ORF) as represented by history curriculum developers within the South African Department of Basic Education, and the history textbook authors and publishers within the Pedagogic Recontextualising Field (PRF). The role of the agents operating within the PRF is to select and organise, according to the dominant construct of a subject-discipline (determined by the ORF), the knowledge that is required to be recontextualised, within, for example, textbooks (Singh, 1999, p. 576).

Bernstein's (2002) field of reproduction refers to the classroom where knowledge is transmitted by the teacher to the learner and reproduced in order to determine the competency of the learner to operate within a specific subject discipline. How this occurs is not a focus of my study.

For my study, it is important to stress that the first two fields of the pedagogic device are sites of conflict or competition for a monopoly on informational capital between different agents (Singh, 1999, p. 573). Hugo and Bertram (2009) echo this when they describe these respective arenas as sites of struggle; as the group who succeeds in controlling a particular field is able to be the "distributer of consciousness, identity and desire" (Bernstein and Solomon, 1999, p.269). It must also be understood that the fields of the pedagogic device are hierarchically structured in that recontextualisation of knowledge cannot take place without production, and reproduction cannot occur without recontextualisation (Singh, 1999, p. 574).

It needs to be borne in mind that Bernstein's pedagogic device is not focused on the message, but rather on the medium in which the message is carried, transformed and transmitted (Hugo and Bertram, 2009. p.2). In other words, the concept of the pedagogic device does not seek to prescribe the nature of academic knowledge, but rather to clarify the structures through which knowledge is pedagogised in the educational system. For the puposes of this study I am interested in both the message and how it is pedagogised/ recontextualised across particularly the first two fields of the pedagogic device; namely the fields of production and recontextualisation.

The research question posed needs to be approached in a manner that seeks to lay out the competing views on what it means to *do history*. As such, it is logical to seek to understand the notion of *doing history* via a journey through Bernstein's first two fields and to identify the different debates that are inherent in them. I also attempt to determine the nature of the connection between the debates around *doing history* in the fields of production and recontextualisation.

2.3 What is history within the Field of Production?

The field of production is, as Hugo (2013) states, an arena where we experience the "scent of heated argument and debate pitched at the highest liminal thresholds…" (p.131). This field of contestation is well illustrated in the academic debate around the question, 'what is history?' Within this debate, it is possible to identify three broad philosophical traditions that seek to

answer the question. EH Carr (1961) in his seminal work, *What is History?*, defined two dominant scholarly traditions in the study of history up to the 1950s; namely the positivists (hard-core empiricists) of the nineteenth century and the empirical-reconstructionists (modernists) of the early to mid-twentieth century. The positivists believed in the objectivity of historical facts, and that the more historical facts that can be collected, the more real a picture of what happened in the past can be created. The assumption is that facts stand apart from the historian and can speak for themselves and accurately portray the past. Within this paradigm, the job of the historian is to record (Carr, 1961, p.3). In essence, the positivist approach suggests a 'scientific' view of the study of history with the ultimate, highly ambitious goal of seeking out *the truth* (Paxton, 1999; Carr, 1961). According to this view, the past tells its own story with no reference to the person narrating it (White, 1987).

Carr (1961) then proceeded to plot a change in the philosophy of history. He presented a shift away from an obsession with the inviolability of facts to an empirical-reconstructionist or modernist perspective. In the empirical-reconstructionist tradition, the importance of historical fact is not reduced, but Carr emphasised that the study of history is concerned with the role of the historian in the selection and interpretation of historical facts. A historian seeks out the facts he or she wants and then interprets them. Therefore, historical writing cannot be totally objective. The facts of history are always refracted through the mind of the historian and the historian will always view the facts of the past through eyes situated in the present. As such, history for Carr (an empirical-reconstructionist himself), "is a continuous process of interaction between the historian and his facts, an unending dialogue between the present and the past" (Carr, 1961, p. 28), or a reconstruction of history through the lens of the historian in the present. Carr, and other empirical-reconstructionists, accepts that historical interpretation, as exercised by the historian, is the definitive engine for creating historical understanding and meaning (Jenkins, 1995). There is then an acceptance by empirical-reconstructionists that the subjectivity of the historian will always be problematic to an extent in creating an understanding of the past. But, importantly for empirical-reconstructionists, this does not lessen the role of evidence derived at empirically in the process of studying history (Callinicos, 1995).

Post-modernists like Alun Munslow, Keith Jenkins and Hayden White have been very critical of the empirical-reconstructionist position. Post-modernists reject the view of history as an empirical, analytical undertaking and instead view it essentially as a literary artefact (Munslow, 2011, p.571). They argue that history is written as a complex narrative discourse,

moulded by the rhetoric, metaphors and ideological strategies of explanation employed by the historian. As such, history is as much invented as found (Ibid. p.575). Jenkins (1999) argues that within the post-modernist paradigm, the past as a whole remains ultimately unfathomable and irreparably relativistic in its interpreted form (p.4). The post-modernists view the empirical-reconstructionists as ultimately unable or unwilling to admit that the writing of history could possibly be a fictive pursuit, and that the forensic study of sources of evidence through authentication, comparison and colligation saves history from being a purely literary enterprise (Munslow, 2010, p.3).

This clash between the post-modernists and the empirical-reconstructionists has been a feature of the field of history production for the past fifty years or so, and Munslow acknowledges that the position of the empirical-reconstructionists has dominated (Munslow, 2010). The post-modernists further remind us that history is always written for someone and thus will always be ideologically positioned; that history as the past does not exist 'historically' outside of the textual and constructive endeavours of the historian (Jenkins, 1999, p. 2). History is constructed by historians and can only be interpreted through them. As such history will always, according to the post-modernists, be "subservient to various powers and interests" (Jenkins, 1999, p. 2).

The post-modernists assert the idea that historians impose their personal agency on what they write, either intentionally or not and that they unavoidably impose their hierarchies of significance on the historical facts they choose to use in their writings. It is the historian who imposes significance onto historical events. As such the distinction between fact and fiction is not as clear, according to post-modernists, as the empirical-reconstructionists would have us believe (Munslow, 2011). Of course this was rejected by the empirical-reconstructionists. For them, accomplished history writing is undoubtedly cemented in the use of proven facts; facts that are verified through procedures that confirm their veracity (Paxton, 1999, p.316).

While the positivist approach to history may equate with the *knowing history* construct, and the empirical-reconstructionist approach with *doing history*, possibly one can describe the post-modernist approach with that of *crafting history*.

As stated earlier, the traditional and dominant view of 'what is history?' in the field of production is that proposed by the empirical-reconstructionists (Munslow, 2010). As we cross over into the field of recontextualisation it will become clear that the empirical-reconstructionist view of history also dominates, in conjunction with the positivist paradigm.

However, does this mean that the post-modernist view of history does not show itself in the field of recontextualisation? I am of the opinion that implicitly or inadvertently it does. This argument is taken up more fully in the discussion chapter.

2.4 What is school history within the Field of Recontextualisation?

If the field of production is concerned with the structure and nature of history as an academic discipline in its own specialised way, then the field of recontextualisation is concerned with the articulation of history into knowledge that is organised, distributable and able to be consumed by those at the level of the school (Hugo, 2009 and Hugo and Bertram, 2013). Within school history teaching we can identify two broad traditions. Both these traditions are reflective of perspectives of history identifiable within the field of production. One tradition we can call *knowing history* (Bertram, 2008), which echoes the positivist view, and the other *doing history* (Seixas, 1999; Paxton, 1999; Barton and Levstick, 2003; Bertram, 2008), which parallels the view of history promoted by empirical-reconstructionists.

An aspect of Bernstein's (1996 and 2002) theorisation of the pedagogic device, is his concern with the ethical dimension of the transformation of academic knowledge into classroom knowledge. The concern is the way in which this transformation could impact negatively on the learners through the production of a false "historical gaze" (Bernstein, 1996, p. 170) through the curriculum and textbooks. A 'historical gaze' refers to developing an understanding of the skills of *doing history* and the internalisation of substantive historical factual content, that is, *knowing history* (Bertram, 2008; Hugo and Bertram, 2009). As such, *knowing* and *doing* history cannot be seen as mutually exclusive. The ethical question is to ask whether a 'historical gaze', inclusive of *knowing* and *doing* history, and reflective of the dominant paradigm in the field of production, is reflected in history curricula and school history textbooks. It should be, but a number of scholars, such as Paxton (1999), Osborne (2004) and Hugo and Bertram (2009) argue that it is not happening.

Research from the United States (Paxton, 1999), Canada (Osborne, 2004) and South Africa (Hugo and Bertram, 2009) suggest that there is a disconnect between the empirical-reconstructionist approach to history in the field of production and the approach to history in fields of recontextualisation and reproduction. While my focus in this chapter is on the field of recontextualisation, a glimpse into the occurrences in the field of reproduction can help to illustrate the disconnection.

Writing about the field of reproduction in the United States, Paxton (1999) observes that students in classrooms tend to be consumers, rather than analysers of history, particularly in their approach to using textbooks. Rarely do these students question the reliability of these resources with regards to the intention of the authors and the bias inherent in the books. Often the use of these resources is focused mainly on the assimilation of information through the surveying of the textbooks for 'useful' facts and explanations (Paxton, 1999). By extension, the learning of history in American schools is often characterised by an uncritical approach to what students read, which is in stark contrast to academic historians and their inherent lack of trust in the sources they engage with. In essence, the majority of history students in American schools display an inability to think historically and critically (Ibid.p.331). One can then argue that learners within the American context operate within a positivist paradigm, rather than an empirical-reconstructionist one. The 'historical gaze' required in school to inculcate a *doing history* approach is interrupted.

The interruption of the 'historical gaze' that is pronounced in the teaching and learning of history in the United States also appears to be evident in Canada, where "the approach to history in schools presents history as an established narrative of facts about which people can hold differing interpretations" (Osborne, 2004, p.4). Within this approach the students are not introduced to the problems historians face, such as making judgements about the worth of evidence confronted in deciding what is of significance and what is not (Ibid.p.5). This tentatively suggests that the positivist paradigm continues to assert itself over the empirical-reconstructionist paradigm within the field of reproduction.

It could be that the fault for this disconnect lies in a failure within the field of recontextualisation (both within the ORF and the PRF) to fully understand what it means to *do history* as the notion comes to them from the field of production. Or possibly the problem lies within the field of reproduction where history teachers (who are not necessarily historians themselves) fail to fully appreciate what it means to *do history*. A site for the investigation of a possible reason for this disconnect may lie within how textbooks, as agents of the Pedagogic Recontextualising Field, potentially fail in their mandate.

Again I stress that the *doing* history and *knowing* history constructs are not mutually exclusive. An ability by the learner to work with known or consumed historical facts, in order to do history, is vital. The problem arises when the need to uncritically consume historical

facts, without working on and with them as historians do, comes to dominate the 'historical gaze' in schools.

We also need to be aware that history is not just about past events and being able to critically engage with them. Thornton and Barton (2010) remind us that it is too simplistic see history as a stand-alone discipline that can unfold the nature of the subject for us within a school context. They alert us to another characteristic of school and academic history: its multi-disciplinary nature.

History is a subject that "transcends disciplinary boundaries" (Thornton and Barton, 2010, p.2484). They stress the irony of developing historical understanding in learners, in that learners can only develop meaningful historical understanding if they study disciplines other than history (Ibid. p.2484). Thornton and Barton (2010) argue that all historical knowledge depends on concepts that are not born specifically from the discipline of history (Ibid. p.2485). History, in the creation of its language, draws on disciplinary fields as widespread as economics, sociology, psychology and anthropology. For Thornton and Barton (2010) there is no conceptual content in history that is entirely unique. Learners who fail to internalise concepts from a range of disciplines will be unable to unlock the meaning of what they study in history (Ibid. p.2485). However, disciplines like economics, sociology, psychology and anthropology are not school subjects in South Africa. Does that mean that South African history learners will never develop a full understanding of historical processes while at school? This could be a consequence particularly if the education of history teachers does not include developing at least a basic understanding of these other disciplines and how they impact on history. Read in the South African context, Thornton and Barton illuminate for us a possible weakness in the teaching and learning of not only history learners, but teachers as well.

To summarise thus far, *knowing history* in the field of recontextualisation appears to be related to the positivist approach to history in the field of production, while the *doing history* approach in the field of recontextualisation is related to the empirical-reconstructionist approach in the field of production. The development of a 'historical gaze', as Bernstein (1996) describes it, means developing both an understanding of the skills of *doing history* and the internalising of substantive historical factual content (Bertram, 2008; Hugo and Bertram, 2009). In this respect the approach to history in the field of recontexualisation, in South Africa in particular, appears to constitute both the constructs of *doing* and *knowing history*.

I now seek to define more deeply the academic skills of the *doing school history* construct. This paradigm does not only require a learner to know facts, but also to act on them as historians do. How then do the *actions* of the historian manifest themselves within the school context?

Both globally and locally, history curriculum development has undergone a change. In Britain in the 1970s and South Africa in the early 1980s (under the Joint Matriculation Board and the Natal Education Department), we saw a shift from a predominantly *knowing history* approach to a predominantly *doing history* approach (Bertram, 2008). To recap, Bertram (2008) defines *knowing history* as an approach that sees history as a narrative of past events, and as a collection of facts presented in chronological order. Learners are assumed to be consumers of history, in that the role of the teacher is to present indisputable historical facts to learners (Ibid. p.156.). Barton and Levstick (2003) have described this approach within schools as reproducing the stories of the past. Paxton (1999) has also identified this approach to history teaching in the United States in the way historical resources like textbooks have been assembled. He points out that many textbooks fail to reflect what competent historians *do* and are not much more than a repository of facts, events and people from the past that learners are required to internalise (Paxton, 1999). However, as mentioned before, a shift has happened and within South Africa the advent of democracy in 1994 saw a broad introduction of an approach to history that has tried to reflect what it is that historians actually *do*.

Doing school history as an alternative tradition to the positivist approach emphasises constructivist modes of engagement with the past by learners, with a focus on understanding perspective and engaging with certain historical skills (Bertram, 2008, pp. 156-157). For Bertram (2008) *doing history* embraces both the knowledge and procedures of history; an idea put forward by Seixas (1999) and Barton and Levstick (2003) as well. This is history designed to bring students to so-called historical ways of thinking that include critical reading and interpretation of source material, the identification of bias and the practice of inquiry skills (Bertram, 2008, p.157). Osborne (2004) identifies unique historical skills that are foregrounded in the *doing history* approach; although he does emphasise that there are some 'generic' skills that history shares with other subjects, such as research and communication skills to mention a couple (Ibid. p.5). However, the unique skills he identifies are those such as:

> "…the ability to work with historical data, to interpret and evaluate primary and secondary sources, to analyse historical arguments and narratives, to evaluate the credibility of data, to assess historical significance, to empathise with people in the past, to understand the ways in which the past differs from the present, to use historical knowledge to explore contemporary problems, and the like." (Osborne, 2004, p. 5).

These unique skills are described by Barton and Levstick (2003) as well. They emphasise how important it is for learners to understand how history is constructed. This is achieved through historical investigations that stress both primary and secondary source analysis, relationships between historical evidence and constructed historical accounts through an understanding of multiple perspectives that are often divergent in nature, coupled with an appreciation of how people in the past held differing outlooks on events than we have today (Barton and Levstick, 2003, p.359).

However, the focus by Osborne (2004) and Barton and Levstick (2003) on the unique skills of history and their importance in the *doing history* construct seems to underplay the importance of historical content. This appears to demonstrate a disconnect between historical skills and historical content. In other words, they appear to present the *knowing* and *doing* history constructs as mutually exclusive.

Seixas (1999) has emphasised this disconnect between historical skills and historical content in his paper *Beyond 'content' and 'pedagogy': in search of a way to talk about history education*. He identifies two discourses that historians and teachers use to describe their own and each other's roles. The first discourse tends to see historical content and historical skills as being separate, with discipline-based historians seen as content experts and teachers as skills experts. The second discourse revolves around the notion of 'doing the discipline' (Ibid. p.317), where we are asked to see historical content and historical skills as being inseparable sides of the same coin. Seixas (1999), drawing on Shulman (1987), describes this symbiotic relationship between content and skills in history as being pedagogical content knowledge; and it is an ability to work with historical content and skills that forms the core of what it mean to *do* history.

Seixas (1999) stresses that it is in doing the discipline that content becomes pedagogy and pedagogy becomes content. He identifies two closely positioned aspects of what it means to *do* the discipline of history. The first is the ability to critically read texts (both primary and

secondary) as accounts of the past. And secondly, to demonstrate an ability to construct historical accounts (Seixas, 1999, p.328).

Historians, teacher and learners all partake in the above aspects of *doing history*, albeit at different levels of competency, and Seixas (1999) stresses that it is an artificial or even fallacious separation of labour to see historians as only content experts and teachers as only skills experts. The processes engaged in by the historian are also the processes engaged in by the teacher and ultimately the learner. *Good* history is the same for both historians, and teachers and learners, in that for all, it entails an exposure to the process of constructing considered historical accounts developed through a process of critical enquiry (Ibid. p.332) using factual historical knowledge.

Seixas (1999) therefore calls for an open relationship or engagement between the fields of production and reproduction to ensure that what is taught in the history classroom is relevant to the practice of history, and vice-versa. But, this requires that those agents operating in the different sub-fields of the field of recontextualisation also need to pay heed to what it means to *do history*. And it is a purpose of this research to identify to what extent this is actually taking place within the Pedagogic Recontextualising Field and more specifically within the construction of history textbook assessment tasks.

For learners to master (if this is ever possible within a school) the unique skills of history it also requires an understanding of or initiation into the language of history. Some, like Hugo and Bertram (2009), imply that learners can never become historians and that the best they can hope for is to imitate what it is that historians do. The task of working with and interrogating sources takes years of induction (Ibid. p.5-6). Be that as it may, the job of the history teacher is to strive as much as possible to initiate students into discipline-specific ways of knowing, doing and communicating (Paxton, 1999). The hope is that the textbooks available to learners and teachers are aids rather than obstacles in helping this to happen.

To conclude, *doing history* (incorporating the *knowing* history paradigm) at school entails the learner's ability to develop competency in using the key skills of history on designated, chronologically ordered historical content to develop an understanding of historical processes and how accounts of the past are constructed. However, I do feel it important to make a distinction between what *doing school history* is and the purpose of school history. It is in this distinction that one can identify a possible disconnect between history as it is done in the

field of production and history as it is done in the field of recontextualisation, and by extension the field of reproduction.

2.5 The purpose of school history

On an 'academic' level the purpose of school history is to impart some interest and understanding of past events, and to teach learners to use historical knowledge to develop the skills of historical enquiry, but not necessarily to produce research scholars (Bertram, 2008, p.157). But we need to understand that while the *doing history* approach in schools appears to reflect what happens within the field of production we need to be aware that the purpose of history in the field of production is not necessarily the same as it is in the fields of recontextualisation and reproduction.

Bertram (2008) stresses that, in addition to *doing history*, *good* history teaching aims to promote non-discrimination, and encourage learners to debate and grapple with a broad range of social and environmental issues. Osborne (2004) also stresses underlying nationalistic goals of school history curricula that strive to instil in learners a sense of national identity, while at the same time encouraging, often through debate, an appreciation of the multi-cultural nature of society (p.7).

The importance of citizenship education as a purpose of school history is also highlighted by Paxton (1999). He feels that a reason for the disconnect between the field of production and the field of reproduction is that the field of recontextualisation may impose a political agenda on the teaching of school history; and this agenda promotes uncritical understandings of patriotism and democracy, which may undermine the academic project of history teaching (Ibid. p.325). However, post-modernists would argue that the political imperative is just as prevalent in the field of production as it is in the field of recontextualisation, albeit more 'hidden' behind motivations surrounding grant applications, funders' objectives and personal career aspirations.

The need to impose a political agenda in the field of recontextualistion, by those in power, also characterises the debate between the agents of the Official Recontextualising Field and the Pedagogic Recontextualising Field. Here a struggle can develop between the academic experts (textbook authors) and the political agents (education department officials) over how, according to the academic experts, the political agenda possibly undermines the academic project of history teaching.

Within the South African context, Morgan (2010) identifies the purpose of school history, as reflected in the revised National Curriculum Statement (2002), as being citizenship education that unlocks the potential of learners to influence the societies they live in, in addition to promoting the skills of historical enquiry. As such, history is a vehicle for the promotion of human rights and democracy as well as a vehicle for the development of key academic skills (Ibid. p.302). A study of the extent to which South African history textbooks create opportunities for learners to *do history* needs to take into account the added dimension of citizenship education as a key purpose of history within South African schools.

In other national curricula, history (although not entirely) is often seen as a separate discipline to social studies, civics or citizenship education (Thornton and Barton, 2010). In South Africa, particularly in the Further Education and Training (FET) phase, there is less 'choice' than in some other countries regarding branches of social studies that learners at school may wish to pursue. As such, our national pattern, as in certain states of the United States, has sought to frequently blend history with other subjects like civics or government.

School history is, therefore, not as cut-and-dried a subject as it may appear to be. It entails an academic dimension that seeks to impart generic and unique historical skills to learners. It is also tasked with the difficult job of creating *good* citizens able to participate constructively within a pluralistic democracy.

The move from an apartheid-era curriculum to a post-apartheid history curriculum has seen a shift from a decidedly positivist epistemology to a more reconstructionist/ constructivist one; a move from a 'fact and dates' approach to a more empirical, analytical, interpretive approach Bertram, 2008). Within this reconstructionist approach to history in schools is the need to develop the unique skills of history, to inculcate certain political values and attitudes into learners, and to develop the understanding of learners and teachers regarding the cross-disciplinary nature of history as a discipline. A key issue that arises is whether the academic and political purposes of the *doing history* construct in schools may conflict with one another?

How then is the purpose of school history reflected in the products that come from the field of recontextualisation?

2.5.1 School history curricula

Ultimately, the intention of all curricula is to state the purposes and goals of a discipline that has been judged important for inclusion into a school's academic programme (Osborne, 2004, p. 4).

With the introduction of the revised National Curriculum Statement of 2008 and CAPS in 2012 in South Africa, we have shifted away from the much criticised outcomes-based approach to the teaching and learning of history within schools, an approach that was critiqued for disrupting the natural shape and flow of history as an academic discipline. This is substantiated by research conducted by Hoadley (2011) within the South African educational context where she pointed out that the outcomes-based approach brought about an "eschewal of the definition of content… [by]… fostering generic skills for a global economy" (p. 145).

A key reason for the move to a more discipline-based approach to history in South African schools was the fact that many poorly trained and resourced teachers in South Africa foundered in a system that poorly defined what they actually needed to do within different learning-areas (Hoadley, 2011 and Hugo, 2013). Certainly from my experience there was a backlash from history teachers who felt that their subject was sinking within a sea of forced and inappropriate learning area integration and a focus on generic academic skills. In other words, history and its unique skills (as with other subject-disciplines) were in danger of being 'watered down' into irrelevance and to a point where its construct bore little resemblance to the discipline within the field of production. By 2008 and further in 2011 through the new Curriculum and Policy Statement for history, the Department of Basic Education had taken action and subject-discipline lines had been solidified (Hoadley, 2011 and Hugo, 2013) and an attempt at a re-imposition of the unique characteristics of *doing history* as a discipline had appeared.

The essential purpose then of school history curricula is to define the generic and unique academic skills of *doing* history (incorporating *knowing* history), as well as clearly stating the desired political outcomes framed by those in power. It is this essential purpose that should be recontextualised into textbooks written by key agents in the Pedagogic Recontextualising Field.

A thorough examination of the construct of school history (both its academic and politcal dimensions) proposed in the History CAPS is provided within the data presentation chapter, as it is this document that provides baseline criteria for what it means to *do* history within the current South African school context. That examination provides the measure for how the requirements of the curriculum, as decided by the agents in the Official Recontextualising Field, are transmitted to textbooks created by agents within the Pedagogic Recontextualising Field.

2.5.2 School history textbooks

Textbooks are based upon curricula. So the content, skills and political agenda presented in curricula should be exemplified in textbooks (Osborne, 2004, p.28). Most teachers and learners therefore assume that textbooks authentically recontextualise that which is in the curriculum, and they believe uncritically in the worth of textbooks as helpful foundations for teaching and learning (Ibid. p.28). Textbooks appear to provide a "ready-made structure for a course [that] generally follows the pattern of the curriculum, and offers students a useful framework for their studies" (Ibid. p. 28). In this respect textbooks are often seen as 'considerate texts' (Armbruster, 1984); that is, texts that require the author to construct and style their writing in a way that reduces difficulties in comprehension and other learning skills, and that seek to facilitate understanding, learning and remembering (Paxton, 1999, p. 326). Such 'considerate texts' that closely align with the requirements of the curriculum are believed to lead to greater learner achievement (Ibid. p.326).

Textbooks serve a central role in the history classroom, whether they validly reflect the paradigm of history stated in the curriculum or not (Ibid. p.327). If this is so in generally well-resourced educational systems as are present in the USA, then it is even more so in the South African educational context "where many teachers [and learners] have no access to any other media or subject knowledge" (Morgan and Henning, 2011; Morgan, 2010). Quoted in Morgan and Henning (2011) the South African Minister of Education in 2009 stated that, "history textbooks cannot but remain central to the cause of an improved history education," and government has continued to re-iterate this standpoint.

2.5.2.1 The purpose of history textbooks

If textbooks have the power to greatly influence learners cognitively and socially/ politically, then we need to be clear on what the purposes (both explicit and implicit) of history

textbooks are. Much of this would depend on how textbooks authors or publishers (and curriculum writers) see their audience. Such imagined audiences suggest that textbook writers and curriculum developers put the past to specific uses (Morgan and Henning, 2011, p.186).

Explicitly, textbooks are "pedagogical guidebooks" (Paxton, 1999, p.317) that provide supplementary information, in the form of secondary and primary evidence, on new topics introduced by the teacher. In this respect textbooks are there as scaffolds for learners that are envisioned by authors to be lacking in factual knowledge on events and people. Learners are therefore imagined as 'consumers' (Paxton, 1999) or 'knowers' (Bertram, 2008) of history. Textbooks provide a framework which a teacher can either follow very closely with minimal deviation, or use as a foundation that can be built onto using other sources or media (Osborne, 2004, p.30). The problem with the former approach is that learners, encouraged by teachers, come to see textbooks as "definitive statements of objective fact" (Ibid. p.30). Such an approach could also suggest that textbook authors see learners and teachers as being cognitively unable to practice what it is that historians do, or being plain ignorant of knowledge of the past.

Furthermore, school history textbook authors, as agents under the power of the Official Recontextualising Field (state curriculum developers), are required to create textbooks that are vehicles for political education. School history curricula have been a target of politicians and other pressure groups who seek to revise these curricula to support certain political projects of the day (Thornton and Barton, 2010, p.2472). These political imperatives are transferred onto the textbook writers and publishers. History goes beyond the academic project and is often used as a vehicle to further the ideology of the state. Here learners may be viewed as uncritical thinkers ripe for manipulation at an ideological level. By extension, through the curriculum imposed by state education departments, authors or publishers would be under pressure to see learners as pliable entities to be moulded into beings who think about their position in a country in a certain way.

Osborne (2004), in his analysis of Canadian history curricula, also stresses that behind the academic project of transmitting knowledge and skills, lies the fundamental goal of promoting a specific state-sanctioned concept of citizenship and identity (p.4). The danger is that too often the academic purpose of the discipline of history and history textbooks takes a back seat to a history designed to transmit ideas about patriotism and benefits of democracy (Paxton, 1999, p.325). Textbooks then become ideological tools that present opinions and

knowledge in a dogmatic fashion that undermines the notion of critical thinking so fundamental to the idea of *doing history* (Morgan, 2010, p.300).

In South Africa the history curricula since 1994 have stressed the purpose of history as being to influence learners to use their potential to transform the societies in which they live (Morgan, 2010). This could be achieved by instilling citizenship values in learners, and textbooks are vehicles to achieve this. As such, textbook authors and publishers also see learners as potential agents of change in bringing about a better society, through the promotion of a human rights message in what they write, and as proponents of democracy and justice on a human and environmental level (Morgan, 2010, p.300).

Let us return to the academic project. On one level, as mentioned above, textbook authors may see their audience as empty vessels that require filling with historical knowledge. In this respect learners and teachers are treated, consciously or sub-consciously, with a degree of disrespect as being unable to do what it is that historians do. But other textbook authors choose to see teachers and learners as critical thinkers who are able to engage with history on an individual level without having a narrative imposed on them (Morgan, 2010, p.302). These are textbooks that encourage learners to engage in argumentation, to draw independent conclusions through enquiry, and that recognise the multitude of voices and perspectives in history (Morgan and Henning, 2011). In other words, these are the textbooks and authors that see as paramount the need for learners to *do history*.

Paxton (1999) has done much research in the USA showing how school history textbooks very rarely present themselves as resources for doing history. He argues that many textbooks are either guilty of 'watering down' the skills of history to focus predominantly on the generic skill of comprehension, or just present history as a list of facts, events and people. But what historians of the empirical-reconstructionist and post-modernist traditions actually do is to interrogate the origin of sources, both primary and secondary, as it is the hand that created the source that determines its characteristics, message and sub-text (Ibid. p.321). He refers to the "authorial voice" (Ibid. p.319) of written sources, in that we must not forget that it is a human who has created them. As such it is not *the* truth, but *a* truth of an event (Ibid. p.319). However, often the learners and teachers as users of history textbooks fail to recognise this. Textbooks are accepted as the truth of history, with no effort made to question authorship or the selection of historical knowledge included in the book. At best, most textbooks provide us with author names and very little else about their identities, their

sources of information or how they set about constructing the narrative (Paxton, 1999, p.321). This passive acceptance of a textbook as the fount of all correct and relevant knowledge about events runs counter to what it means to *do history*. In this it is not only textbook authors or publishers that should accept responsibility for creating textbooks that possibly undermine the teaching of history, but textbook users also need to share some responsibility for using textbooks in a way that undermines history education.

Paxton (1999) goes on to highlight other problems regarding American school history textbooks and why they often fail to guide learners and teachers to what it is that historians do. His main critiques are that history textbooks are often erroneous in commission or omission, Euro-centric or male-dominated in historiography, overly broad in coverage or difficult for learners to understand; which suggests a naivety regarding developmental psychology on the part of the authors and publishers (Ibid.p.324).

Paxton (1999) is also critical of the rhetorical style of textbook writing; what he has termed "textbookese" (Ibid. p.326). This term describes the written style of textbooks as promoting the notion that textbooks are written by anonymous authorities, objective in nature that are beyond questioning (Ibid. p.326). Importantly, the consumers of the text are told directly or indirectly how they need to read and embrace the ideas and opinions within the text. Again, such a rhetorical style runs counter to the core skills of *doing history* that promote an enquiry-based approach to any and every source of information presented for reading and analysis.

Earlier I discussed the notion of "considerate texts" (Paxton, 1999, p. 326). Such considerate texts, Paxton argues, may discourage learners from actively engaging with the text of a textbook. Such texts may increase the comprehensibility of textbooks, but tend to discourage an active and constant processing of the text by the learner (Ibid. p.326); in other words, it may encourage lazy reading by the learner. Paxton (1999) cites research from McNamara and Kintsch (1996) who suggest that certainly for learners with higher levels of background knowledge, texts that are more 'difficult' ('inconsiderate texts') tend to benefit these learners as they are forced to make their own inferences, to fill in gaps, and make links between the text and their own knowledge (Paxton, 1999, p.327). However, in a context like South Africa where most learners are not first-language English speakers or may lack a general knowledge that middle-class children in developed countries possibly have, such 'inconsiderate texts' may be obstacles to greater historical understanding. Also, the notion of 'considerate texts'

does not necessarily mean providing less or only simple knowledge; it could also mean providing complex knowledge in an accessible manner.

Osborne (2004), writing within the Canadian context, has picked up on many of the same criticisms of textbooks that Paxton (1999) has. Textbooks, he argues, are often guilty of portraying history as an objective, correct, unquestionable truth, denying history as an interpretative, problem-centred construct. Very rarely do textbooks follow the protocol of the academic world by explaining the selection of information or referencing the origin of the information selected for text-construction. The style of writing often does not indicate the provisional nature of assertions made by authors (Osborne, 2004). In other words, it appears as though textbooks are constructed, not by fallible human beings, but by some other-worldly intelligence beyond question (Ibid. p.30). In short, textbooks seldom appear to embody and encourage critical enquiry so central to the notion of *doing history* as proposed by some curricula.

So it appears that school textbooks have a range of specific purposes emphasised in varying degrees within different national contexts. They are there to provide the historical facts about events and people, to assert specific nationalistic agendas, to promote a particular view of good citizenship and to help mould learners into good citizens, but also to further the academic project of allowing learners to be critical thinkers through a *doing history* approach. It would appear that most textbooks, and curricula for that matter, would like to perform all the roles. But, as researchers like Paxton and Osborne have demonstrated, many textbooks fail to achieve these broad aims, and especially their aim to enable learners to engage in historical enquiry and critical thinking. However, a question that needs to be taken up later is whether the political purpose and academic purpose of the *doing school history* paradigm in history curricula and textbooks will always undermine each other, or whether they can co-exist in a symbiotic relationship?

2.5.2.2 Recent history textbook research in South Africa

Has South African history textbook research identified the same or similar failings in textbooks identified in history textbook research in countries like the USA and Canada? It appears so. For Bertram (2008, p.161), drawing on research by Wineburg (2001), it appears that what learners see as reliable texts do not necessarily correspond with what historians believe are trustworthy texts. Learners tended to rate school textbooks as most reliable compared to other historical texts, failing to see these textbooks as ideological tools for the

achievement of certain political aims. Little attention was paid to the origin of the textbooks, as well as the references used in their construction. In contrast, historians ranked school textbooks lowest on their scale of trustworthiness, due to the textbooks' lack of detail concerning origin and references (Paxton, 1999, p.321). It can be implied that because textbooks often dominate learning and teaching in the history classroom, it means that little thought is given to questioning their reliability by the learners; as such learners often fail to do what it is that historians do.

Bertram (2008) identifies three key, interlinked areas that are vital for learners to master if they are to demonstrate an ability to *do history*. Firstly, they require a deep knowledge of events from history and how these events are interconnected. Secondly, they require a deep conceptual knowledge about the way history is reliant on chronology, time, and cause and effect to create its narrative. And thirdly, learners need to acquire skills that will enable them to read, analyse and evaluate primary and secondary sources, and to understand how different interpretations of history are constructed (Bertram, 2008, p.162).

In the research findings of her 2008 paper, *"Doing history?": Assessment in history classrooms at a time of curriculum reform*, Bertram did not specifically target textbooks, but some of her findings imply that textbook tasks fall short of their mandate to induct learners into the *doing history* approach. She analysed assessment tasks from three schools from differing socio-economic contexts which showed that even tasks completed from textbooks often only focused on the generic skill of comprehension and neglected the fact that *doing history* demands that learners demonstrate a deep knowledge of historical events and processes, and that they interrogate sources as historians would do. Few sources in class and textbook assessments were "properly contextualised and learners were seldom required to engage with them as historical documents" (Ibid. p.172).

South African research that focuses on the way that textbooks allow or do not allow learners to do history in a critical fashion has been done by Morgan (2010) and Morgan and Henning (2011, 2013). In her paper from 2010 entitled, *Scholarly and Values-driven Objectives in Two South African School History Textbooks: An Analysis of Topics of Race and Racism*, Morgan sought to ascertain to what extent a selection of grade 11 South African textbooks achieved the aims of the history curriculum. She found that the textbooks varied vastly in the way they interpreted and applied the curriculum, but also in how they presented topics for study and assessment activities, the sources they drew from, the narrative form employed and whether

they enabled historical thinking and understanding. Certain textbooks also tended to push an academic agenda more and others tended to be driven by an agenda that promoted more of the social or political values stated in the curriculum.

Morgan (2010) looked at five aspects for analysis drawn from the curriculum and other scholarly works to analyse how and to what extent textbooks translated curriculum aims. The first aspect dealt with how closely the textbook authors used the curriculum as a framework for their own writing and interpretation of the curriculum. Some tended to recontextualise the curriculum in a way that gave them freedom to write in a more structured, coherent and logical way, while others chose to allow the curriculum to determine their writing and structuring of historical narrative. The second approach (i.e. closely following the order of the curriculum) tended to result in simplistic interpretations of historical events and therefore social phenomena, as well as a stronger ideological message running through the narrative (Morgan, 2010, p.304-305).

The second aspect looked at the extent to which textbooks relied on primary sources as suppliers of historical perspective. Those textbooks with a heavy reliance on primary sources as suppliers of conflicting perspectives tended to enable a more complete realisation of curriculum aims (Ibid. p.303). The third aspect looked at critical thinking skills and the ability of textbooks to provide opportunities for comparing and contrasting varying interpretations of history to allow for learners to draw independent conclusions. Textbooks that gave readers sufficient information before providing a variety of interpretations, as well exposing them to contrasting evidence enabled learners to better construct their own interpretations of events (Ibid. p.304). The fourth aspect was about taking a historical perspective. In other words, textbooks that seek to sensitise learners to attitudes and values of the past through contextualising primary sources avoid creating circumstances where learners interpret historical events through twenty-first century eyes; that is, falling into the trap of *presentism* (Ibid. p.304). Regarding the fifth aspect, Morgan's (2010) research determined that in order for a textbook to achieve its citizenship goals, it needed to engage learners in a personal way with social issues. Moral understanding comes from personally grappling with the complexities of such issues, rather than making sweeping, distanced statements and judgements regarding issues of race for example (Ibid. p.304).

Much of Morgan's other recent research has continued to investigate the significant role that South African textbooks play in history education in South Africa. Research conducted by

Morgan and Henning (2011) entitled *How school history textbooks position a textual community through the topic of racism*, sought to investigate how textbook authors position their readers on particular curriculum topics such as race. Such an investigation helped to develop a deeper understanding of the explicit or implicit purposes behind history textbooks, as well as establishing the authors' attitude to history education.

Other research by Morgan and Henning sought to establish a five-dimensional tool for the textual analysis of history textbooks (See paper: *Designing a Tool for History Textbook Analysis*, 2013). Of importance in my research are Dimension's A and C of the tool. Dimension A deals with how textbooks mediate the intellectual project of history through a focus on knowledge and skills. Dimension C of the tool focused on the positioning of a textual community or how textbook authors view their readership. Morgan and Henning's findings indicate that authors tend to write for an "imagined community" (Morgan and Henning, 2011, p.186) that shares the curriculum's ideals and values. For history textbook authors, the past is there to be used for specific purposes, be it to re-inforce contemporary power relations in society or reflecting more 'acceptable' (post-colonial) historiographies, with the consequence that the intellectual value of history is undermined. This could lead to textbooks mimicking critical thinking in assessment tasks, emphasised by a narrative characterised by a single committed and consistent perspective, and an avoidance of the complexities of textbook topics, or through the phrasing of assessment questions that compel learners to adopt a particlar perspective (Ibid. p.187). It must be stressed that not all textbooks in this study were deemed to have been poor in their ability to capture the aims of the curriculum. Some were more than able to serve their role as scaffolds that created opportunities for historical enquiry.

Several issues with history textbooks encountered in international studies are echoed in studies conducted on South African textbooks. These issues tend to incorporate the problem of textbooks as objective statements of fact that promote a particular social or political agenda, and in so doing often undermine the academic purpose of the curriculum.

My particular study would like to determine whether the problems identified both internationally and locally are still evident in CAPS-compliant South African history textbooks; bearing in mind that previous research conducted by scholars such as Bertram, Morgan and Henning focused on the ability of Revised National Curriculum Statement-compliant textbooks to recontextualise the curriculum. More specifically, for the purposes of

my research, I investigate the assessment tasks in particular, i.e. whether the construct of history as portrayed in Grade 10 CAPS-compliant history textbook assessment tasks is valid in light of the construct of *doing school history* portrayed in the Grade 10 History CAPS? A useful conceptual bridge between the notion of *doing school history* and assessment in history is provided by Wiliam's (2010) concept of construct validity.

2.6 Construct validity in history

In this section I now move to focus explicitly on assessment in history and how it needs to capture the way in which the discipline or construct is understood. In summary, three constructs of history have been explored above: the positivist (*knowing* history), the empirical-reconstructionist (*doing* history) and the post-modernist (*crafting* history).

In his 2010 paper, Wiliam describes construct definition as that which clearly defines what should or should not be included in an assessment task. The subject or discipline construct is vital in validating assessment in that it is the construct, for example of *doing school history* that needs to be assessed in tasks if those tasks are to be deemed valid. If the *doing school history* construct requires learners to adopt a position and argue it using historical facts, then an assessment construct that relies solely on multiple choice-type questions lacks validity.

The role of constructs is at the heart of assessment validity. Wiliam references Wiley (2001) in providing a definition of a *construct*. Very simply, a construct is an ability required for successful task performance (Wiliam, 2010, p.259). These abilities are clarified by how we think about, interpret and organise a discipline to determine what knowledge counts as valid or not and what should be included or not. Specifically, items included to test abilities in an assessment need to be relevant to the construct, be representative of the part of the construct being assessed and provide an adequate sample of the construct (Wiliam, 2010, p.257). Because, "assessments operationalise constructs" (Ibid. p.257), the authenticity of inferences drawn from an assessment depend directly on how accurately the construct of a discipline is captured by an assessment task.

Wiliam (2010) uses the example of assessment in history to illustrate his argument. He analyses what it is that is being assessed in history. If our view of the history construct is that it is about the learning and subsequent regurgitation of objective facts and dates (i.e. a positivist construct) then a multiple-choice style assessment would be adequate as an efficient and accurate way of determining a learner's competence (Ibid.p.260). However, if our view

of the history construct is one that sees history as an endeavour that is primarily about the accumulation and integration of incomplete and biased sources of evidence to construct accounts of historical events (i.e. an empirical-reconstructionist/ or *doing history* construct), then multiple-choice type assessments would provide an inadequate measure of learner competence. In other words, the construct definition for the type of assessment task set would be invalid (Wiliam, 2010, p.260). However, a learner engaging in the selection and synthesis of evidence from a variety of sources to construct an argument in written or verbal form would be a valid assessment approach to a *doing history* construct. Assessment that tries to marry a *doing history* construct with an inappropriate assessment design, suffers from "construct underrepresentation" (Ibid. p.260).

The central argument of Wiliam's (2010) paper is that, because the understanding of a discipline-construct is at the core of assessment validity, any assessment design has to begin with a clear definition of the discipline-specific construct to be assessed. Only then will assessments be designed in a way that will yield valid evidence about a learner's ability to operate competently within the discipline-construct. Construct definition therefore must come before the design of appropriate assessments (Ibid. p.259).

The determination of an answer to my fourth sub-question, '*What does doing history mean at the level of the textbook assessment task?',* will rest upon ascertaining exactly what construct of school history is evident in the History CAPS and then determining whether there is construct validity in the assessment task. A tool of analysis to determine construct validity of CAPS-compliant textbook assessment tasks has been sourced and is presented in the next chapter.

I now move to an explanation of my chosen content area. Assessment tasks require learners to show an ability to work with particular historical knowledge as evidence. Here I introduce the content area, provide justification for the choice and briefly show how the particular content area fits into the Grade 10 History syllabus as a whole.

2.7 The content focus of this research

Seixas (1999) and Bertram (2008) determine that the academic aspect of the *doing history* construct involves a marriage of content knowledge and pedagogical knowledge; what Seixas (based on Shulman, 1986) calls pedagogical content knowledge. For learners to practice the skills of the historian, they need the 'clay' to work with. In this respect the 'clay' of history to

be moulded, manipulated and re-interpreted is what we term content knowledge or historical facts. In this respect I argue that a *doing history* construct cannot exist without an element of the *knowing history* construct. In my study, I cannot determine the extent to which assessment tasks fully represent the construct of *doing school history* in all its manifestations without a content focus. As such, I have chosen to work within the Grade 10 topic unit entitled *European expansion and conquest during the 15th-18th centuries*.

The key content aim for the FET History CAPS is to develop the learners' ability to 'understand our world today' (Department of Basic Education, 2011, p. 13). There is a broad chronology of events for Grades 10 to 12, from the 15th century to the present day, with the purpose of such an approach being to demonstrate to learners the current relevance of past events studied. A comparative approach using both local and international case-studies is used and is designed to demonstrate the interconnectedness of local and world events. At the beginning of this chronological journey, in Grade 10, learners are introduced to the *world around 1600* with the curriculum's intention to "provide a broad comparative overview of some of the major empires at this time…" (Ibid. p.13). What follows is a series of case studies of three major empires (Ming China, Songhai and Mughal India) and their early contact with Europeans before the age of conquest. Once this essential introduction is complete, the second curriculum topic is presented. It is this topic, *European expansion and conquest during the 15th-18th centuries,* with which I work.

The key question associated with this topic is "How did European expansion change the world?" (Ibid. p.14). The focus of this topic is to develop the learner's understanding of "…how and why, in less than two centuries, Europe was able to colonise large parts of the world" (Ibid. p.14). This should enable learners to understand early colonial processes and the consequences of these processes on colonised societies, on ideas of racial superiority and on the changing balance of power in the world (Ibid. p.14). What follows are a series of case studies of European conquest and colonisation in the Americas and Africa. In essence, based on the key curriculum aim of developing an understanding of the world today, learners are asked to see the beginnings of modern globalisation in the 1600s with the start of early European expansion.

Kallaway (2012), in his critique of the History CAPS, states that no clear statement appears in the curriculum document regarding the criteria for content topic selection, such as "…key organising themes, issues [and] links, barring a reference to the need for balance and

'interconnectedness between local and world events…'" (p. 31). He suggests that the fragmentary nature of content selection in the History CAPS is cause for serious review. Why certain content and not others has been chosen is not clear. As this research progresses, this point will be addressed in Section 4.2 of chapter 4.

2.8 Conclusion

In my literature review I have sought to outline the framework of my research as provided by Bernstein's pedagogic device. Through a broad focus on the three fields of the pedagogic device, the fields of production, recontextualisation and reproduction, and a more in-depth analysis of the first two fields as sites of contestation, I have attempted to show how knowledge is recontextualised. This transmission of historical knowledge occurs from the field of production to the field of recontextualisation, and even within the field of recontextualisation transmission occurs from the Official Recontextualising Field (ORF) to the Pedagogic Recontextualising Field (PRF).

While an understanding of how historical knowledge is recontextualised is important, what historical knowledge is recontextualised is also vital. Understanding the discipline-construct in depth is necessary, as Wiliam (2010) states. Therefore I have sought to define 'what is history' within the field of production. Here I have examined three broad approaches of history as an academic discipline; the positivist, empirical-reconstructionist and post-modernist approach. Within the field of production conflict over the nature of history is evident primarily between the empirical-reconstructionists as proponents of *doing history*, and the post-modernists as proponents of *crafting history*.

From here I examined the nature of history in the field of recontextualisation, by identifying two broad traditions in school history. These traditions are framed by the notions of *knowing* and *doing history*. These notions are echoed in the field of production whereby the construct of *knowing history* aligns with the positivist tradition and the construct of *doing history* aligns with the empirical-constructionist tradition. It appears that the notion of *crafting history* has not gained traction within the field of recontextualisation.

I then sought to discuss in depth the nature of the *doing school history* construct. I determined that recent curriculum development in school history has seen a shift from a *knowing* history construct to a *doing* history construct. However, I have sought to stress that these two constructs are not mutually exclusive. *Knowing history* is still a vital component of the

dominant *doing history* construct. The dominant *doing history* construct in schools emphasises the need for teachers and learners to understand the symbiotic relationship between historical content knowledge and the unique skills of *doing history*. In this, Seixas (1999) is a key proponent. Another key characteristic of history in schools is its multi-disciplinary nature as highlighted by Thornton (2010).

But, understanding the characteristics of the *doing history* construct is not enough if we are to fully understand the nature of *doing SCHOOL history*. Therefore an explicit examination of the purpose of school history was required. Here I determined that school history has an academic and a political purpose. The academic purpose is to transmit the skills of historical enquiry, and the concepts and facts of history, while the political purpose is to try and inculcate ideas of good citizenship, certain nationalistic goals, and/or an appreciation of the multi-cultural nature of society in learners. Some scholars, like Paxton (1999) and Osborne (2004), argue that the presence of a political agenda is what distinguishes the study of history in the fields of recontextualisation and reproduction from the study of history in the field of production.

A clear understanding of the characteristics and purpose of the *doing school history* construct is vital if we are to determine the purpose of history curricula. The academic and political characteristics and purpose of school history needs to be articulated or recontextualised in history curricula for transmission in schools. To determine the purpose of history curricula, I looked at curricula research within the South African context and the global context to ascertain similarities and differences.

After having determined the nature of the *doing school history* construct and how it is recontextualised in the curriculum within the field of recontextualisation, the next step was to determine how the *doing school history* construct was recontextualised in textbooks. Here it was important to understand how textbook authors see their readers, as this would determine how they write and what they see as being the key purpose of history textbooks; in other words, how they seek to put history to use in the present. South African (Morgan and Henning) and global research highlights two broad ways in which textbook authors see those whom they write for. Learners and teachers are either viewed as consumers of history through textbooks that are seen as definitive statements of fact. Textbooks that promote this view are often predominantly vehicles for political education at the expense of the academic project of the *doing history* construct. The second view is for authors to see their audience as

critical thinkers through encouraging argumentation, and avoiding the imposition of a specific historical narrative. In history textbooks either the academic or the political project is dominant, and depending on which dimension is dominant, the other is undermined. In my research (see chapter 4) it will be important to ascertain whether this assertion is true.

The critical question that frames this research is: *What understanding of doing history is portrayed in assessment tasks in a sample of Grade 10 history textbooks?* At the heart of this question is Wiliam's (2010) notion of construct validity in assessment. The extent to which the *doing school history* construct is portrayed in the Grade 10 History CAPS, and by extension the textbook assessment tasks under review, requires construct definition; in other words, that which clearly defines what should or should not be asked for in an assessment task. It is in the data presentation and discussions chapters where clarity on this will emerge, but before this can happen the tool/s for identification of criteria inherent in the *doing school history construct* needs to be determined. This occurs in the following chapter.

3. METHODOLOGY

HOW WILL THE CONSTRUCT OF *DOING SCHOOL HISTORY* BE IDENTIFIED IN THE DATA?

3.1 Introduction

The aim of my chosen methodological approach is to detect the extent to which the construct of history proposed in the Grade 10 History CAPS is portrayed in the relevant assessment tasks in the specific textbook (learner books and accompanying teacher guides) chapters under review.

I begin this chapter by clarifying the data to be analysed through a description of the documents under investigation and my justification for using them. I then outline different approaches to textbook research, and follow that by describing the analysis I undertook, which attempts to show how the academic and political aims of the History CAPS are realised in a sample of Grade 10 CAPS-compliant history textbooks. A more focused presentation of the qualitative methodological approach follows, along with an explanation of how this methodology is appropriate for a document study of the construct of *doing school history*. This entails a cognitive demand analysis to unpack the academic dimension of the construct and an ideological analysis to uncover the political dimension of the construct. Included in this is which data I collected and why, as well as how I analysed the data.

The construct of school history identified includes an academic dimension and a political dimension. It is here that the qualitative nature of the research is established through an analysis that deconstructs textbook assessment tasks in an attempt to identify the skills and political stance that the author [and many readers] "takes for granted, valorises or regards as unimportant" (Nicholls, 2003, p.4).

I then proceed to explain the conceptual lens used to bring these two types of analyses into greater focus. This lens draws on the work of Morgan and Henning (2013), and their elaboration of the five-dimensional tool of textbook analysis they constructed. I draw specifically on Dimension A (how texts mediate intellectual skill) and Dimension C (how the past is put to use in the present) of the tool.

I operationalise Dimension A through Bloom's Revised Taxonomy (2005) with reference to cognitive levels and knowledge dimensions, as well as through an analysis of the History CAPS cognitive levels for assessment. This analysis could be classed as a disciplinary or

historiographical analysis with the function of determining how the discipline of history is presented (Nicholls, 2003, p.4), in conjunction with a cognitive-demand analysis that seeks to test whether the cognitive skills for history deemed important in the curriculum are reflected in textbook assessment tasks. Possibly, one can refer to it as a question analysis, with the purpose of determining the extent to which in text-questions facilitate the development of historical academic competence in learners (Nicholls, 2003, p.4).

Dimension C is made operational through drawing on Wertsch's (2002) Table of Collective Memory and History. Here the political dimension of the history construct demands a form of ideological analysis to uncover the *what and how* of the political stance transmitted in the textbook. A determination of political stance can require an analysis of word choice and structures chosen by the author in the general text and task questions, as well as an analysis of bias in sources attached to specific activities.

Finally, I present examples of the coding of cognitive levels and knowledge dimensions (academic dimension) and ideological stance (political dimension) to show how I have used the tools to analyse the data from the documents under review.

3.2 The sample

The South African Department of Basic Education's Grade 10 National Textbook Catalogue for 2013-2014 lists four officially approved textbooks (see Table 1 below) for use in South African schools.

Table 1: Grade 10 National textbook catalogue- prescribed list of CAPS-compliant Grade 10 history textbooks

1. ***In Search of History****, Grade 10* (Oxford University Press)
2. ***Focus History****, Grade 10* (Maskew Miller Longman)
3. ***Viva History Textbook****, Grade 10* (Vivlia Publishers and Booksellers)
4. ***New Generation History****, Grade 10* (New Generation Publishers)

I have used a sample size of three of these listed (see Table 2 below) and their accompanying teacher guides, chosen by convenience sampling. Such sampling, also sometimes called availability sampling, refers to the selection of data sources based on accessibility or

expediency (McMillan and Schumacher, 2010). This type of sampling is often employed in both quantitative and qualitative research due to practical constraints, efficiency or accessibility (Ibid.p.137). However, as with all qualitative studies, one needs to approach this type of sampling with caution as there is often no precise way of generalising about results achieved in this type of research. But, it is still useful if one is seeking to detect or better understand relationships that may exist between different data sources under review (Ibid. p.137), and in my research I have sought to detected the extent to which the construct of history proposed in the History CAPS is portrayed in the relevant assessment tasks in the specific *European expansion and conquest in the 15th to 18th centuries* chapters under review.

Table 2: Data sources

1. History CAPS Document, Grade 10, 2011 (Department of Basic Education)
2. *In Search of History, Grade 10*. J. Bottaro, P. Visser, N. Worden. 2011. Oxford University Press **+ teacher guide.**
3. *Focus History, Grade 10*. B. Johanneson, M. Fernandez, B. Roberts, M. Jacobs, Y. Seleti. 2011. Maskew Miller Longman **+ teacher guide.**
4. *Viva History Textbook, Grade 10*. KL. Angier, JT. Hobbs, EA. Horner, RL. Mowatt, G. Nattrass, JA. Wallace. 2011. Vivlia Publishers and Booksellers **+ teacher guide.**

At the school where I teach, my learners and I use prescribed textbook number 1 (*In Search of History, Grade 10*). Anecdotal evidence from my colleagues in other schools also suggests that most use textbook 1. My personal experience is that this textbook strikes a good balance between depth of historical content knowledge and tasks that cover the range of historical skills. However, I stress that this opinion was purely based on 'my impression and experience' and had not yet been backed up by any empirical research. I also use textbook 2 (*Focus History, Grade 10*) as a supplementary resource, particularly to provide my learners with additional practice tasks and assessments. Again, my generally positive judgement of this textbook was not based on empirical study. My choice of the third textbook (number 3) for inclusion was based on convenience; specifically availability and cost of the textbook and accompanying teacher's guide. I did not include book 4 (*New Generation History*) into my study because it was not available in bookshops when I started my research and I was told it would take a long time to come.

The small sample of textbooks, coupled with the narrow topic focus on *European expansion and conquest in the 15th to 18th centuries* prevents using the results of this study to generalise across other history textbooks by the same publishers or even other topic areas within the sampled textbooks (Pingel, 1999). However, this content area presents opportunities to textbook authors to enable teachers and learners to grapple with key historical concepts like cause and consequence, as well as the possibilities for debating different perspectives inherent in this topic. Therefore I argue it is a content area suitable for *doing school history*.

Assessment tasks are designed to elicit a response from learners in order for a teacher to gauge levels of understanding. As such, if I am to gain as complete an understanding of what the textbook authors understand to be historical understanding, it is imperative that the teacher guides and the answer guidelines they contain are analysed in conjunction with the assessment tasks. Therefore I have included the teacher guides that accompany each of the sampled textbooks in the data sources.

3.3 Different approaches to textbook research

Here I outline the different types of textbook research traditions before situating my own study within them. Textbook research in the late twentieth century has developed into a more 'scientific' pursuit to provide a deeper insight into the teaching of history and the political and academic impact it has on learners. Certainly from the 1970s onwards, textbook studies have reflected on the concept of history embedded in textbooks with a focus on content analysis, pedagogical thrust and reviewing the concepts of national identity and pride (Pingel, 2010, p.44). Marsden (2001), quoted in Pingel (2010, p.44), talks about an analytical structure for textbook research that consists of three crucial elements: content, method and mission. My research is predominantly concerned with method and mission, however, my choice of a focused content area can provide insights into the academic method and political 'mission' embedded in the data.

Textbook research has also extended beyond issues related specifically to content and pedagogical issues. Some research studies have investigated and evaluated how textbooks as educational resources are used in the classroom, while others have focused on textbook design and how the use of pictures, maps, cartoons, photos and drawings function to determine perspective, angle of approach, or how they complement the text (Pingel, 2010, p.48). Much of this research takes place within the field of reproduction, and as such has low relevance to my particular study. In addition, there are studies investigating the development

of new media (electronic media, like websites) in history education and the challenges they present with regards to access to information and how they are changing the learning environment (Pingel, 2010, p.51). Again, my research falls outside of the scope of this particular realm.

According to Pingel (2010, p.31), textbook analysis can be undertaken from two general points of view: 1. *a didactic analysis* and 2. *a content analysis*. In history textbook research a *didactic analysis* focuses on the methodological approach to different historical topics and explores the pedagogy employed in the text. *Content analysis*, by contrast, examines the text itself; specifically whether it accords with academic research and whether it sufficiently covers the content topic in question. Predominantly, university scholars like historians or social scientists are concerned with *content analysis*; while educators are generally more concerned with a *didactic analysis* of how a particular curriculum is transferred to the learners via the textbook. My research combines these two categories because assessment, by definition, speaks to both pedagogy and content: the tasks build on or presume a particular pedagogy and they intend to elicit a particular content.

The *didactic* and *content analysis* I perform uncovers conclusions and results to provide an overview of the content topics dealt with and pedagogical approaches applied; omissions and controversial issues are identified and possible recommendations for improvement are suggested. Examples of 'good' and 'bad' practice in textbooks in relation to the curriculum are highlighted (Pingel, 2010, p.33).

Pingel also points to a wider approach to textbook analysis that can be adopted. Such an approach can have several foci:

1. The issue of knowledge versus skills, where a textbook is analysed according to the educational tools it presents to learners, rather than just as a conveyor of facts.

2. Another approach may focus on uncovering issues of collective identity that are often embedded in the history presented in the textbook, that seek to develop a certain national self-concept or promote a certain historical narrative.

3. An analysis can also be undertaken that looks at how history textbooks can be vehicles of multiculturalism in diverse societies through the use of multi-perspectival methodologies and skills-oriented approaches (Pingel, 2010, p.37).

I argue that my research contains all three elements of the wider approach outlined above. I try to understand how textbooks provide learners with the skills of *doing history*, how they transmit a political project through promoting issues of collective identity, and how they address issues of diversity through the promotion or neglect of multi-perspectivity.

Whatever the approach of the research is, a helpful beginning to the analysis of history textbooks is the determination of the prevailing historical consciousness, cultural patterns or scientific developments at play within the national context. Is there a culture of looking at issues from other perspectives, not just in history but in everyday attitudes and positions? This national disposition, articulated by those in power, can impact on educational pursuits through the power inherent in the agents of the Official Recontextualising Field. Is there a shift from treating history as a body of factual knowledge to be memorised to a view of history as a rational investigation of the past based on a multi-perspectivity of viewpoints? (Gallagher, 1996, as referenced by Pingel, 2010, p.43). This national disposition is exposed in, amongst other things, the curriculum documents of the country. Therefore, in my research I develop a clear understanding of the construct of school history proposed in the History CAPS. This document provides my baseline data for an in-depth analysis of the textbook tasks and answer guidelines under investigation.

My choice of analytical approach is governed by my position as a history educator and the desire to conduct an analysis that is of both theoretical and practical value to my classroom practice; to clarify for myself the role of textbooks as teaching tools and to be sensitised to the issues embedded within them that could influence the way my learners understand history as an academic discipline.

3.4 What is the methodological approach?

The methodological approach of my study is essentially qualitative. Qualitative research designs emphasise the gathering of data in the form of words rather than numbers (McMillan and Schumacher, 2010, p.320). More specifically I undertake an analytical study whereby I investigate the academic and political dimensions inherent in documents. This involves identifying, studying and synthesising the data to provide an understanding of key concepts that may not be directly observable.

Ensuring the reliability and validity of my findings is essential. In qualitative research this refers to the degree of alignment between my findings and the “realities of the world”

(McMillan and Schumacher, 2010, p.330). To ensure the reliability of my findings, I as the researcher must adopt an iterative approach to the data to clarify whether and how key concepts and patterns are present in the data. An iterative approach means a constant moving back and forth between the tools of analysis and the data to make certain that findings are valid and reliable. In this type of analysis, documents are the major data source (Ibid. p.330). A concept analysis studies key educational concepts. In the context of my research, these key concepts are *doing school history* and *construct validity* in history textbook assessment tasks. Validity is achieved if I actually observe what I think I see or uncover in the data (Ibid, p.331). Certain strategies can be employed in conceptual analysis to enhance reliability and validity. Foremost, prolonged and persistent engagement with the data is essential.

A lengthy period of interaction with the data provides numerous opportunities for the researcher to conduct interim and then more in-depth data analyses, preliminary comparisons and corroboration to determine patterns, anomalies, and to refine ideas and criteria (Ibid. p. 331). Again, an iterative approach in deconstructing the data is essential.

The use of low-inference descriptors during the data collection process is also vital. This involves the employment by the researcher of descriptions of the data in notes or elaborations that are as concrete and precise as possible. This enables a more accurate identification of patterns or anomalies that may arise. Low-inference analysis implies the use of descriptors that are as literal as possible and clear to anyone who may engage with the notes (McMillan and Schumacher, 2010, p.331), and therefore are more valid and reliable.

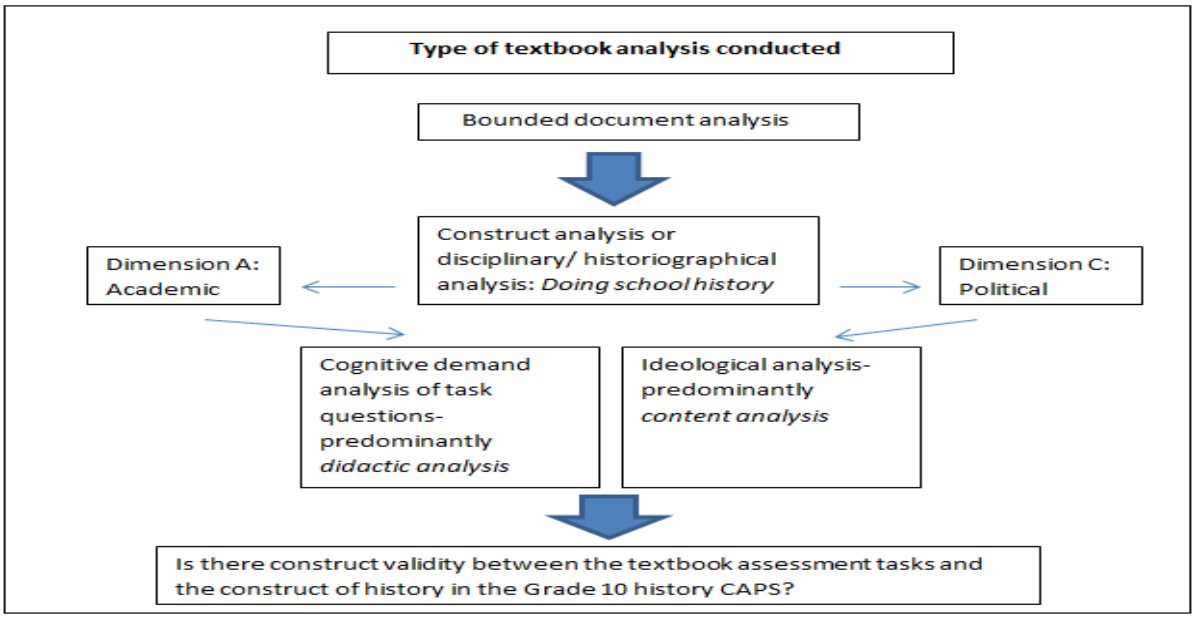
A reflexive attitude by the researcher is very important as well. The researcher must actively search for, be aware of, record and analyse any discrepant data that may emerge. Such data is that which contradicts emerging patterns or indicates a variant to emerging patterns (Ibid. p.332). A strategy to enhance researcher reflexivity is the keeping of a journal as a continuous record of decisions made during the data collection and analysing process. In this journal justifications of decisions or modifications to analysis strategies can be recorded (Ibid. p.334). The employment of such a journal was invaluable to me as it enabled me to record and remember decisions I made in the preliminary data analysis and the more in-depth analysis; such as a decision to shift much of the focus of my ideological analysis to the textbook and chapter introductions and teacher guides, rather than the individual task questions.

While the overarching methodology is qualitative, instances of quantitative methodology are necessary to measure how frequently certain phenomena occur, or how much space is allocated to particular phenomena (Nicholls, 2003, p.3). Such quantitative data gathering enabled me to judge the breadth of occurrence of the academic skills of history as well as the frequency and type of political message that occur (Ibid. p.3), before the predominant qualitative analysis is embarked on.

This study is a bounded (in terms of sample size and content topic focus), in-depth document analysis (McMillan and Schumacher, 2010). But to narrow it further, within the documents (curriculum, textbooks and teacher guides) as sources of data, I have engaged in a history construct analysis (William, 2010) of textbook assessment tasks framed by a clear vision of what it means to *do school history*.

To conclude this sub-section of the chapter, I present a flow chart to summarise the type of analysis conducted.

Figure 1: A flow chart demonstrating the type of analysis conducted



The flow chart demonstrates the diversity of the analysis to be undertaken if a complete understanding of the different aspects of the construct of *doing school history* is to be developed from the data. First the flow diagram broadly indicates that a bounded, document analysis is conducted with the intention of determining what construct of history is evident in the data. This construct analysis is narrowed to take into account the two different dimensions (academic and political) that make up the *doing school history* construct. The academic

dimension conforms to Morgan and Henning's (2013) Dimension A, and the political dimension conforms with Morgan and Henning's (2013) Dimension C. In essence then the analyses conducted are a cognitive demand analysis for the academic dimension and an ideological analysis for the political dimension. This is to determine whether construct validity is evident between the textbook assessment tasks investigated and the construct of school history proposed in the Grade 10 History CAPS.

What then are the conceptual lenses required to undertake these kinds of analyses in the data under investigation? This conceptual lens has been briefly introduced in Chapter Two, but for re-emphasis due to its importance as a foundation for my analysis, I include it again in this chapter.

3.5 Conceptual lenses

The foundational framework or lens for analysis was provided by Morgan and Henning's (2013) five-dimensional tool for textbook analysis. Within this tool the researchers identified five dimensions (not exhaustive) that ought to be taken into account when analysing history textbooks. These dimensions frame the way textbooks allow for:

A. making own/personal historical knowledge,

B. learning empathy,

C. positioning a textual community,

D. fashioning stories, and

E. how form, space, design and composition of the textbook orientate the reader.

For the purposes of this research I used dimensions A (as it encapsulates the academic project of the doing school history construct) and C (as it encapsulates the political project) of Morgan's tool.

Dimension A is primarily concerned with how texts mediate historical intellectual skills and whether they increase the capacity of learners to use these established skills (Morgan and Henning, 2013, p.53). Accordingly, this requires a clear understanding of the discipline-specific, 'scientific' areas of knowledge that the textbooks mediate as well as an understanding of how they seek to do it (Ibid. p.53). Morgan and Henning draw on Levstick's notion of teachers seeing learners as either *producers* or *consumers* of historical understanding, and stress that textbook authors also view their audience in these ways, and so

they asked what possibilities the textbook authors present to learners to make their own historical knowledge (consider differing perspectives and communicate their own interpretations) and to develop cognitive competence or whether learners are only required to extract and comprehend historical knowledge (Morgan and Henning, 2003, p. 54).

Morgan and Henning's research focused on all aspects of the history textbooks; from the text, to visuals, to layout; whereas mine focuses specifically on whether textbook assessment tasks and accompanying teacher guides mediate historical skills associated with the curriculum-driven *doing history* construct. Therefore, the key guiding question that I kept in mind in the coding process was: to what extent do assessment tasks mediate to learners the core skills associated with the *doing school history* construct?

Morgan and Henning (2013) state that Dimension C is the counterpart of Dimension A, as it focuses on the kinds of 'uses' the past is being put to, rather than the historical skills being mediated (p. 56). Textbook writing is by extension an act of deliberately creating uses for the past in the present; because textbooks are agents of social action (Ibid. 56). Textbook authors write from a certain ideological disposition and this dimension highlights the need to try and uncover what this disposition is. This is important because, as Loewen (2007) points out, "even if they do not learn much history from their textbooks, students are affected by the book's slant" (p. 344). My research therefore reflects on the potential impact on learners made by the ideological slant or bias inherent in the textbook assessment tasks and teacher guides as constructed by the textbook authors. This dimension focuses on the political sphere of the *doing school history* construct. I therefore ask, in the coding process, whether and how the assessment tasks and accompanying model answers sought to put the past to use in the present.

Additional tools were required to create finer grading of Morgan and Henning's dimensions specifically for the purpose of textbook assessment task analysis. For Dimension A (*the academic dimension*) I therefore drew on Bloom's Revised Taxonomy (2005) used in conjunction with the History CAPS cognitive levels for assessment (Grade 10 History CAPS, p.33). For Dimension C (*the political dimension***)** I drew on Wertsch's (2002) Table of Collective Memory and History, as Morgan and Henning did, in conjunction with the descriptions in the History CAPS that espouse the political project. An explanation of Wertsch's table follows after I discuss the process of tool generation.

3.6 Conceptual tools (the process of tool generation)

In choosing an instrument for data collection and analysis I have had to think about how best I could achieve both a framework for thinking about cognitive demand analysis and ideological analysis. Would these analyses be performed together or separately? By extension, would two tools be required or one? In choosing a tool (or two) I would have to attempt to "formulate a framework or criteria of categories…fine-tuned to the specific aims and objectives" (Nicholls, 2003, p. 4) of my study. This would require a clear understanding of what it means to *do school history*. These cognitive demand and ideological stance criteria were applied to all the relevant parts of the textbooks in the sample; namely the assessment tasks and marking guidelines within the *European Expansion and Conquest in the 15th to 18th centuries* units of the selected textbooks and accompanying teacher guides, along with the History CAPS and its accompanying sections on ideological stance and tables of cognitive levels.

The coding of data, based on the criteria, is in an 'open' process in that it is the data that drives the categories that emerge from the coding (MacMillan and Schumacher, 2010, p.347). I went into the coding process alerted to specific criteria that I was looking for, but I also needed to maintain an open mind to additional criteria that could have emerged during the data coding and analysis process. These additional criteria could be issues which were not anticipated by the tool. In this respect the procedure for coding and categorisation could not be overly structured and prescribed. Such an *emergent* design would allow "more flexibility in the process used and in the determination of categories, themes, and theories" (Ibid. p.347). I therefore needed to be aware of the iterative nature of my research.

3.6.1 Academic Dimension (operationalising Morgan and Henning's Dimension A)

Using the cognitive levels described in the Revised Bloom's Taxonomy (Anderson, 2005) was important as this is the guiding taxonomy used in the creation of assessment tasks in the South African educational system. Drawing on the History CAPS and this taxonomy, I created a table of comparison (see Table 3 below) that enabled ease of coding and categorisation of cognitive levels evident particularly in the textbook assessment task questions. The Revised Bloom's Taxonomy also describes knowledge dimensions that categorise different types of knowledge. These, in relation to history, are discussed further on.

Table 3: CAPS cognitive levels and abilities covered during formal assessments compared to the Revised Bloom's Taxonomy cognitive levels.

CAPS Cognitive Levels	CAPS Cognitive level descriptors for source-based assessment questions and tasks	Revised Bloom's Taxonomy levels	CAPS Weighting (Grade 10)
LEVEL 1 (L1)	• Extract evidence from sources	**Level 1 (Remember)** Recognising, Recalling	40%
LEVEL 2 (L2)	• Explain historical concepts • Straightforward interpretation of the sources • What is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source? • Compare information in sources	**Level 2 (Understand)** Interpret, highlight, classify, summarise, imply, compare, explain **Level 3 (Apply)** Executing, Implement	40%
LEVEL 3 (L3)	• Interpret and evaluate information and data from sources • Engage with questions of bias, reliability and usefulness of sources • Compare and contrast interpretations and perspectives within sources and by authors of sources	**Level 4 (Analyse)** Differentiate, organise, attribute **Level 5 (Evaluate)** Check, critique **Level 6 (Create)** Generate, plan, produce	20%

In this table I have synthesised the History CAPS cognitive levels for assessment with the cognitive levels in the Bloom's Revised Taxonomy. The purpose of this is to compare and contrast the spread of cognitive levels between the two to determine overlap or if there are misalignments. In other words, do CAPS cognitive levels to be assessed cover the range of levels proposed in the Revised Bloom's Taxonomy? The weighting column indicates the percentage spread of higher and lower order cognitive skills that is required by the History CAPS in the construction of formal assessment tasks.

I used this table to develop codes that corresponded to each of the Revised Bloom's and CAPS cognitive levels displayed in activity questions under analysis. From the table it is interesting to note that while the *creation* of "an original, coherent and balanced piece of historical writing" (Department of Basic Education, 2011, p. 9) is demanded of learners in the eight unique skills of history (a skill echoed by other theorists of the *doing history* approach), this same skill does not appear in any of the three cognitive levels for formal assessment outlined on page 33 of the History CAPS (2011) document. It appears that the CAPS cognitive levels were constructed in conjunction with the old Bloom's Taxonomy; hence there is no specific mention of learners needing to use evidence to generate and argue their

own point of view. However, if a learner writes an essay that requires them to argue a point based on evidence provided using CAPS level 3 skills, then by necessity they will also be working at Bloom's level 6.

Within the Revised Bloom's Taxonomy, Krathwohl (2002) also highlights knowledge dimensions evident in subject disciplines. He identifies four distinct knowledge dimensions; factual, conceptual, procedural and metacognitive. The table (4) below summarises the characteristics of the four knowledge dimensions.

Table 4: Summary of the knowledge dimension of the Revised Bloom's Taxonomy (Krathwohl, 2002, p.214)

Knowledge dimension	Characteristics
Factual knowledge	Knowledge of terminology Knowledge of specific details and elements
Conceptual knowledge	Knowledge of classifications and categories Knowledge of principles and generalisations Knowledge of theories, models and structures
Procedural knowledge	Knowledge of subject-specific skills Knowledge of subject-specific techniques and methods Knowledge of criteria for determining when to use appropriate procedures
Metacognitive knowledge	Strategic knowledge Knowledge about cognitive tasks, including appropriate contextual and conditional knowledge Self-knowledge

My analysis of knowledge dimensions was limited to a study of the specific assessment activity headings to gain an understanding of the main knowledge dimension thrust associated with each assessment activity. By doing this I hoped to determine the predominant knowledge dimensions promoted in the relevant textbook chapters and whether these aligned with the knowledge dimensions stressed or implied in the History CAPS.

3.6.2 Political Dimension (operationalising Morgan and Henning's Dimension C)

Here I engage with how the textbook author sees their audience. History textbooks, as transmitters of historical knowledge, are vehicles of social action determined by the social and political context of the time (Morgan and Henning, 2013, p.11). Morgan and Henning drew on Wertsch's (2002) table of Collective Memory and History (see Table 5 below) in the construction of their Dimension C; and Wertsch's table again proved useful in my research in

enabling a more focused dissection of the key question; how is the past put to use in the present?

Table 5: Collective Memory and History (Wertsch, 2002, p. 4)

Collective memory	History
"Subjective"	"Objective"
• Single committed perspective • Reflects a particular group's social framework • Unself-conscious • Impatient with ambiguity about motives and the interpretation of events	• Distanced from any particular perspective • Reflects no particular social framework • Critical, reflective stance • Recognizes ambiguity
Focus on stable, unchanging group essence	Focus on transformation
Denial of "pastness of events" • Links the past with the present • Ahistorical, anti-historical	Focus on historicity • Differentiates past from the present • Views past events as taking place "then and not now"
Commemorative voice • Museum as a temple • Unquestionable heroic narratives	Historical voice • Museum as a forum • Disagreement, change, and controversy as part of on-going historical interpretation

Wertsch's table provides two categories (not hierarchies). The first category seeks to identify history that is used to promote a collective memory and the second category seeks to identify the nature of historical thinking or history. What is collective memory? Collective memory is the product of attempts by those in a position of power (political leaders, publishing houses, authors etc.) to create a usable past that serves certain political and identity needs (Wertsch, 2002). Wertsch argues that historical texts that seek to promote a collective memory are subjective in nature, static in perspective, seek to commemorate that which is deemed noteworthy by authority and attempt to use the past in the present for certain political purposes. Those texts that fall into collective memory category are seen to be ahistorical or anti-historical in nature. A consequence of this therefore is often a "propensity to sacrifice accuracy in the service of providing a usable past" (Wertsch, 2002, e-book ref. 572).

On the other hand, historical texts that adhere to the history category are 'objective' in nature. Wertsch's use of the term 'objective' needs to be explicitly defined. In the context of Wertsch's writing this means that historical thinking acknowledges a multitude of perspectives, not just one subjective 'reality' (Ibid. e-book ref. 635). There also needs to be an understanding of the dynamism of historical thinking that clearly differentiates between

the past and present and promotes a historical voice that sees historical thought as characterised by disagreement, change and controversy (Ibid. e-book ref. 649). The history category of Wertsch's table aligns strongly with the academic project of *doing history*. Political education is therefore not the primary purpose of history. In the construction of his table, it appears that Wertsch makes the collective memory category and the history category mutually exclusive. However, I argue that implicit in the respect for different perspectives and a culture of debate as proposed in Wertsch's history category is a respect for democracy and the thoughts and rights of others which is a political goal or use of history. Here then is an example of how the political ('collective memory' category) and academic ('history'category) projects of history education might not be deemed mutually exclusive.

Wertsch's table was particularly useful in the analysis of answer guidelines provided in the teacher guides as well as the general text and sources attached to activities in the learner books, as it appeared that these were the places where textbook authors mainly sought to embed and transmit implicitly or explicitly a particular political message through a pre-determined dominant historical narrative. In coding the political dimension I used colour rather than specific letter codes. The use of colour made it easier for me to determine the use of instances of 'history' or 'collective memory' in the data sources. Once this coding was complete I referred back to Wertsch's table to make a more focused judgement using the specific Wertsch descriptors associated with either his 'history' or 'collective memory' categories.

I have discussed tools used to analyse the data. Next, I provide examples of coding that typified my decision-making in analysis.

3.7 The coding process

I kept an analysis journal to record my decisions and justifications during this process. Examples as illustration of the procedures followed will be provided to demonstrate the method used in the coding.

Before starting the process of coding and analysis I read the introductions, both of the textbooks and teacher guides as a whole and of the specific chapters under review. I did this to try and uncover a sense of the authors' perspectives on the nature of school history, both in an academic and political sense. With regards to political stance, I wanted to determine whether I could identify an over-arching historical narrative that dominated in the chapters

under review. In the preliminary reading, I found an anti-colonial narrative in all three textbook chapters; however the strength of this narrative could only be determined after in-depth coding and analysis had taken place. In the data presentation and discussion chapters that follows, I comment on what kind of narrative is present, the possible purpose of this type of narrative and whether it is aligned to the political project embedded in the History CAPS.

Once the preliminary reading of the introductions was complete, I proceeded with a preliminary reading of the relevant chapter in all three textbooks. When I read through an activity I did this in conjunction with the teacher's guide. While reading I made notes, highlighting areas where I felt a particularly strong political stance was evident, both in the general text, activity sources, and teacher guides. The in-depth coding and analysis that followed would either confirm or contradict my initial sense of the strength of the political stance.

As I read through the textbook chapters (including assessment tasks) and teacher guides, I conducted a preliminary coding of cognitive levels and knowledge dimensions alongside the political stance in the activity questions in an attempt to determine how 'easy' this coding process would be, and to sensitise myself to what to look out for when the in-depth coding began. These notes were hand written in the textbooks and teacher guides and comments arising out of this were recorded in my electronic journal. These notes were not detailed in nature, but guides for me to follow when I returned to code in-depth. During this preliminary analysis I noticed some of the difficulties I would face in the coding, such as the complexity in determining cognitive levels or the need to focus my ideological analysis primarily on the general text in the learner books and the teacher guides, rather than on the learner book activities.

3.7.1 Coding of the academic dimension

For the in-depth coding of the cognitive levels in each activity I referred to Table 3 (see p.49) constructed out of Bloom's Revised Taxonomy and the cognitive levels defined in the History CAPS. I annotated each question with a code and a colour, which helped determine the frequency of occurrence of a specific cognitive level. I added an explanation to justify my decision and provided longer explanations of choice when there was ambiguity regarding cognitive level. I resolved this ambiguity through a close study of Bloom's Revised Taxonomy descriptors as well as advice by Anderson (2005) that in such cases the default is

to the higher cognitive level. In Table 6 below I show the codes I created for use in the analysis of the cognitive levels in the textbook assessment tasks.

Table 6: Codes used

CAPS Cognitive Levels	Revised Bloom's level	My Codes
LEVEL 1 (L1)	Level 1 (Remember)	L1R
LEVEL 2 (L2)	Level 2 (Understand) Level 3 (Apply)	L2U L2A
LEVEL 3 (L3)	Level 4 (Analyse) Level 5 (Evaluate)	L3An L3E
	Level 6 (Create)	L4C

Table 7 (on page 53) shows how I set about coding the cognitive levels. The question refers to the actual activity question. The CAPS and Bloom's levels refer to how I characterised the question, as well as the code I assigned to the question. The last column refers to the explanation I wrote to justify my choice. The example questions below are a random selection from the data to illustrate my coding. I have ordered these examples according to the hierarchy in the CAPS and Revised Bloom's Taxonomy cognitive levels.

Table 7: Examples of how coding of cognitive levels took place

Questions (Taken from *Oxford History, Grade 10*)	**CAPS level**	**Revised Bloom's level**	**My Code**	**Explanation of choice**
Timeline task (p. 35 of learner book). Timeline provided. Questions follow: 1. Which European nation was the first to sail to the Indian Ocean? 2. Which American empires did Cortes and Pizarro of Spain conquer? 3. Name three continents that Portuguese explorers reached. 4. Roughly how long after African slaves were first taken to the Americas did the first slaves arrive at the Cape?	L1	L1	L1R	All questions are extraction/recognition questions. Study timeline and conduct basic extraction of relevant information from it.
Activity 3 (p. 45 of learner book). Explain how the 'encomienda' system worked.	L2	L2	L2U	Requires comprehension and explanation of key unit concept (the 'encomienda' system) using their own words.
Activity 2 (p. 51 of learner book). How does creating questions help you to see the relevance that events in the past can have on our lives today?	L2	L3	L2A	Application of the skill of asking questions about the past to enabling learners to develop an understanding of their present circumstances.
Activity 3 (p.51 of learner book). In what ways do Sources D and E (both of which are primary sources) back up what is said in Source C (a secondary source…).	L3	L4	L3An	Requires a breakdown of similarities inherent in two primary sources to substantiate what is pronounced in Source C. Comparison of interpretation in different sources.
Activity 1 (p.39 of learner book). Study Source B on the previous page and then answer this question: Is it appropriate that one man is given credit for discovering the routes shown on the map when he sailed with a ship full of people?	L3	L5	L3E	Question asks learners to make a judgment regarding appropriateness (evaluation).
Extended writing task (p. 63 of learner book). Use your knowledge and the sources about the relations between the Dutch and the Khoi to write an article for a magazine called, "When two cultures meet". You should include information on attitudes to land and farming; changes in ways of ruling; the effects on culture, particularly religion and language; changes in population structure; attitudes towards the land and environment and other.		L6	L4C	Requires an in-depth explanation and understanding of differences between two cultures on different levels. Planning, sourcing of relevant information and synthesis of said information into an original whole by the learner is required.

In the table above I have provided a brief glimpse into the coding process of the assessment task questions in terms of the cognitive levels which was repeated for each activity question in the chapter under review in the three textbooks.

Regarding the coding of the Revised Bloom's knowledge dimensions, I focused on activity headings in each of the chapters to determine the conceptual knowledge focus. The historical conceptual knowledge considered important in the History CAPS is outlined in the table below.

Table 8: Key historical concepts- History CAPS, p. 10

- Historical sources and evidence; incorporating concepts of selection, relevance, attribution, usefulness. - Multi-perspectivity; incorporating concepts of reliability, bias, stereotyping, subjectivity, empathy, argument - Cause and effect. - Change and continuity. - Time and chronology.

It is interesting to note that most of these historical concepts (bar time and chronology) appear to specify an alignment with the *doing history* approach evident in the empirical-reconstructionist paradigm. The historical concepts of time and chronology appear to align with the *knowing* history construct evident in the positivist paradigm. This supports the notion put forward in my literature review that the *doing school history* construct contains elements of *doing* and *knowing* history. But, the *doing* history construct still dominates.

Table 9 (on page 55), indicates the examples of identified knowledge dimensions and explanations thereof. I have provided two examples of coding of conceptual knowledge undertaken, as well as an example each of the coding of meta-cognitive and factual knowledge. These last two examples are from individual task questions, rather than from activity headings. No examples of the procedural knowledge dimension were identified in the data.

Table 9: Examples of coding of knowledge dimensions

Activity	Activity heading	Knowledge dimension	Explanation
***Focus History*: Activity 8, p. 55.**	Extracting and interpreting information about the impact of colonisation on indigenous societies.	Conceptual knowledge	Emphasis on key concept of historical change or consequences caused by certain actions in history.
***Viva History*: Activity 2.3, p.66.**	Comment on perspectives in sources.	Conceptual knowledge	Emphasis on key concept of historical perspective, with secondary emphasis on bias and understanding primary sources.
***Oxford History*: Activity 3, Question 6, p. 53.**	All these sources give a one-sided description of the Portuguese. How was your thinking or attitude towards the Portuguese influenced by this selection of information? (Were you aware of this when you were reading them?)	Meta-cognitive knowledge.	Question asks learners to reflect on their thinking and development of attitude, and how it might have changed while reading sources.
***Oxford History*: Activity 2, question 2 a, p. 43.**	Identify the details in the painting that show that the Spaniards had better weapons.	Factual and conceptual knowledge	Learners need to demonstrate an understanding of the different weapons (key facts) that gave the Spanish an advantage. Without this factual and conceptual knowledge learner understanding of reasons for Aztec conquest would be limited.

Above I have attempted to provide insight into the coding process with regards to the academic dimension (incorporating the cognitive levels and knowledge dimensions) inherent in the data. I now shift my attention to the coding process involved in the identification of the political dimension in the data.

3.7.2 Coding of the political dimension

The coding associated with the political analysis was challenging. I hoped to identify in particular how the textbook authors sought to use history as a tool to teach citizenship or political lessons in the present (Morgan and Henning, 2013). I hoped also to determine whether I could identify a particular type of historical narrative. I felt that if a particular narrative was dominant, then this would determine source selection in the learner books as

well as task selection and answer guidelines; with all of these aligned to promote a particular narrative.

Trying to conduct an ideological analysis of individual activity questions in isolation from this particular type of historical narrative would be unproductive. I felt that for most questions (particularly those that test recall and comprehension) it was difficult to pinpoint a particular ideological stance inherent in them as they stood alone. But, if I analysed them within the context of the particular type of historical narrative of the chapter as a whole, these questions played their part in the author's attempts to create a past that sought to promote a certain ideology. Assessment tasks on their own do not tell the researcher enough about the ideological orientation of the chapters. Therefore, I needed to look elsewhere to gain that evidence. Answer guidelines or rubrics are an intrinsic part of the assessment question.

It was for this reason that I changed tack and stopped trying to conduct an ideological analysis on each question and focused my ideological analysis specifically on the answer guidelines in the teacher guides, and the textbook and chapter introductions. I do feel that my ideological analysis would have been strengthened by an in-depth textual analysis of the entire chapters in question. However, this was not possible due to the scope of the research.

I drew on Wertsch's (2002) table to provide me with descriptors for the collective memory and history categories of analysis. Promotion of a political use of history (Wertsch's 'collective memory' category) was strong in a question/ assessment task and accompanying answer guidelines if there was prevalence of:

- subjectivity or impatience with ambiguity in perspective, and

- a clear attempt to link the past with the present.

Prevalence of these characteristics could indicate a learner book and teacher guide that is seen as a tool to commemorate the negative treatment of indigenous peoples in the context of an anti-colonial narrative.

The political stance was weak (aligned to Wertsch's 'history' category) in a particular chapter if there was an effort to:

- recognise ambiguity in perspective, and

- create a clear differentiation between the past and the present.

Prevalence of these characteristics could indicate a learner book or teacher guide that is a forum for contestation.

Below are some examples from the reviewed teacher guides that reflect stronger or weaker ideological-historical narratives.

a. Example of collective memory category

Question	Answer guideline	Wertsch category	Explanation
***Focus History Grade 10*, Activity 3, p. 47. (activity heading)** Extracting and interpreting information on the Spanish conquest.	**P.43 of teacher guide. The answer guideline for the activity provides the following guidance to teachers:** "Give learners the opportunity to express their thoughts and concerns. The principles that underlie our whole education system include social justice, human rights and inclusivity, and learners' responses should be in line with these principles."	Collective memory	The guidance provided by the teacher guides superficially suggests a tolerance of different learner points of view. However, the answer guideline goes on to make an explicit statement that acceptable learner responses are only those that comply with the principles of the South African constitution. This indicates impatience with ambiguity in perspective. And secondly, discussions about the past in a history class need to be used in the present to affirm values and principles of the South African constitution. Here there is a clear attempt to conflate the past with the present.

b. Example of collective memory category

Question	Answer guideline	Wertsch category	Explanation
***Focus History Grade 10*, Activity 4, question, 1.2, p. 48.** What does the picture show? What does it tell us about the past?	**P. 45 of teacher guide.** The picture shows Spanish conquistadors hunting the indigenous population for sport; beating, raping, torturing, killing, and then using the bodies as food for their hunting dogs. The picture shows how the Spanish regarded the Native American population.	Collective memory	The picture source was drawn by Theodorus De Bry in 1590, but the scene was based on first-hand stories told to him by returning European explorers. The picture was reproduced in a modern newsletter called the Indian Times, which campaigns for the rights of the few Native Americans left today. In the context of the historical narrative of anti-colonialism in the chapter, this answer seeks to emphasise the extreme negativity of Spanish rule and resorts as well to generalisation ('the Spanish…the Native American…') which creates a simplistic understanding of relations between coloniser and colonised. Evidence of a particular narrative that plays a role in commemorating the suffering of indigenous peoples.

c. Example of history category

Question	Answer guideline	Wertsch category	Explanation
***Oxford History Grade 10*, Activity 1, question 1, p. 39.** Identify the different arguments historians have given about the reasons for European expansion.	**P. 29 of teacher guide.** The different arguments that historians have given for European expansion are: - European culture and religion were superior and therefore they had the God-given right to spread Christianity across the world. - When the Ottoman empire blocked overland trade routes from Asia, the Europeans had to find another way to Asia. It was an economic motive that started their voyages. - Compared to the powerful empires in the East, Europe was poor and desperate. It needed to find new sources of wealth. - As a result of improvements in maritime (naval/sea) technology, Europeans began to explore the oceans. - After the new ideas of the Renaissance (for example that the world was round), courageous Europeans wanted to know more about the world.	History	Answer guide provides a variety of arguments suggesting a need to understand the complexity involved in thinking about historical processes. The arguments provided also acknowledge the multi-disciplinary nature of history as they suggest political, economic, anthropological or technological interpretations. The answer does not seek to foreground any particular argument.

d. Example of history category

Question	Answer guideline	Wertsch category	Explanation
***Viva History Grade 10*, Activity 2.4, question 5, p.74.** Write a paragraph of approximately 10-15 lines using the information in the section 'The siege of Tenochtitlan' explaining why Cortes and the Spanish were able to defeat the Aztecs.	**P.22 of teacher guide.** The paragraph must be written in full sentences and include the following information from the learner book: *7 possible reasons provided…but also contain the caveat at the end…*"Accept any other relevant answer."	History	A detailed answer is provided which acknowledges the complexity in interpretations regarding the defeat of the Aztecs. A study of the answer reveals factors that apportion causes to the Spanish and the Aztecs, as well as an instruction to allow learners to think outside of what is specified in the answer. The suggested answer clearly acknowledges the ambiguous nature of historical thinking and attempts to break from a particular simplistic narrative where the Spanish are 'bad' and the Aztecs are innocent in contributing to their own demise.

The examples provided above where chosen to typify my decision-making. Examples A and B are included to typify ways in which intolerance of ambiguity in perspective, *presentist* thinking and the foregrounding of a particular historical narrative manifest themselves in the data. These are examples of how Wertsch's 'collective memory' category appears. In contrast, examples C and D show how some aspects of the answer guidelines demonstrate the complexity in historical thinking through acknowledging the ambiguity in perspective and diversity in reasoning. These are examples of Wertsch's 'history category'.

Decision-making with regard to the ideological analysis was complex at times due to the ambiguous nature of the political messages that arose out of the data. But, I reached resolution in these cases through constant re-examination of the political project espoused in the History CAPS in conjunction with the descriptors provided in Wertsch's (2002) table. Therefore, as with the coding of the academic dimension, an iterative approach to the coding of the political dimension was vital in order to clarify my decision-making.

3.8 Conclusion

I began this chapter by outlining different approaches to textbook research, and determined that I have predominantly undertaken a didactic analysis, as well as a content analysis, that shows how the aims of the History CAPS are transferred to learners via the textbook. A more focused analysis of the methodological approach revealed the qualitative nature of the research through a document study of the construct of *doing school history*. This entails a cognitive demand analysis to unpack the academic dimension of the construct and an ideological analysis to uncover the political dimension of the construct.

I then highlighted the conceptual lenses used to bring these two types of analyses into greater focus. These lenses were drawn from the work of Morgan and Henning (2013), and their five-dimensional tool of textbook analysis they constructed. I drew specifically on Dimension A (how texts mediate intellectual skill) and Dimension C (how the past is put to use in the present). Dimension A was made operational through Bloom's Revised Taxonomy (2005) with reference to cognitive levels and knowledge dimensions, as well as through an analysis of the History CAPS cognitive levels for assessment. Dimension C was made operational through drawing on Wertsch's (2002) Table of Collective Memory and History.

I then clarified the data to be analysed through a description of the documents under investigation and my justification for using them. Finally I presented examples of the coding

of cognitive levels, knowledge dimensions and ideological stance to show how I used the tools to draw out the data from the documents under review.

In the next chapter I present and analyse my data.

4. DATA PRESENTATION AND ANALYSIS

HOW ARE THE ACADEMIC AND POLITICAL DIMENSIONS MANIFESTED IN THE DATA?

4.1 Introduction

Chapter 4 presents the data on assessment tasks in the *European expansion and conquest in the 15th to 18th centuries* chapters, found in Grade 10 textbooks published by Oxford, Focus and Viva. This chapter has 3 sections: a general overview of the three textbook chapters under investigation, a presentation of data for the academic dimension, i.e. the cognitive levels and knowledge dimensions in the assessment tasks, and a section on the data for the political dimension, i.e. the political positioning of the tasks as determined by the Wertsch categories of history and collective memory.

4.2 General overview of textbook chapters under review

Here I provide a brief overview of where the content sample, *European expansion and conquest in the 15th to 18th centuries,* fits into the entire Grade 10 History content as stipulated by the Grade 10 History CAPS. There is a chronological sequencing to the content for the year. At the beginning of this chronological journey in Grade 10, learners are introduced to the *world around 1600* with the curriculum's intention to "provide a broad comparative overview of some of the major empires at this time…" (Ibid. p.13). A series of case studies follows of three major empires (Ming China, Songhai and Mughal India) and their early contact with Europeans before the age of conquest. Once this introduction is complete, the second curriculum topic is presented. It is within this topic, *European expansion and conquest during the 15th-18th centuries*, that I will be working. The key question associated with this topic is "How did European expansion change the world?" (Ibid. p.14). The focus of this topic is to develop the learners' understanding of "…how and why, in less than two centuries, Europe was able to colonise large parts of the world" (Ibid. p.14). This should enable learners to understand early colonial processes and the consequences of these processes on colonised societies, on ideas of racial superiority and on the changing balance of power in the world (Ibid. p.14). What follows are a series of case studies of European conquest and colonisation in America and Africa (Ibid. p.14). Based on the key curriculum aim of developing an understanding of the world today, learners are asked to see the beginnings of modern globalisation in the 1600s with the start of early European expansion and its advantages and disadvantages.

The syllabus then looks at The French Revolution (Topic 3), Transformations in Southern Africa after 1750 (Topic 4) and British colonial expansion in Southern Africa (Topic 5). Topic 6 focuses on The South African War and Union. There is a chronological progression from about 1450 to 1913. A general content theme across the year is discernible, namely European colonisation and its consequences, although the insertion of the French Revolution seems to disrupt this theme. The table below provides the content sequencing suggested by the Grade 10 History CAPS. This sequence is reflected in all three textbooks under investigation.

Table 10: Overview of Grade 10 History topics (p. 12 of CAPS)

GRADE 10	**Overview of History topics (p. 12 of CAPS)**
Topic no.	**Topic Title**
1	The world around 1600.
2	European expansion and conquest during the 15th -18th centuries.
3	The French Revolution.
4	Transformations in southern Africa after 1750.
5	Colonial Expansion after 1750.
6	The South African War and Union.

The following table (11) is included to give a sense of the percentage that each *European expansion and conquest* chapter makes up of the total content in all three textbooks under review. It appears from these percentages that all three textbook devote a similar amount of space to this particular topic.

Table 11

Textbook	**Pages devoted to Topic 2**	**Percentage of total textbook pages**
Oxford History Grade 10	27 pages out of 186	14,5%
Focus History Grade 10	33 pages out of 249	13,25%
Viva History Grade 10	56 pages out of 335	16,7%

The table below (12) is included to provide a sense of the number of pages allocated to each topic in the textbooks under review.

Table 12

GRADE 10	**Overview of History topics (p. 12 of CAPS)**	***Oxford***	***Focus***	***Viva***
Topic no.	**Topic Title**	**Pgs. Per topic**	**Pgs. Per topic**	**Pgs. Per topic**
1	The world around 1600.	26	24	42
2	**Expansion and conquest during the 15th -18th centuries.**	**27**	**33**	**56**
3	The French Revolution.	34	47	46
4	Transformations in southern Africa after 1750.	28	40	65
5	Colonial Expansion after 1750.	23	47	43
6	The South African War and Union.	32	43	65

According to the statistics presented in the table above, both the *Focus History Grade 10* and the *Oxford History Grade 10* allocate relatively fewer pages to the *Early European Expansion and Colonisation* topic (2) than *Viva History Grade 10*. This could provide us with an indication of the relative importance ascribed to the chapter under review in the eyes of the different textbook publishers.

In Table 13 below I provide statistics that give an overview of the frequency of occurrence of different activities per chapter in each textbook, as well as the total number of individual questions. An activity can be made up of one or many different questions. I have included these statistics to give a sense of the number of opportunities provided in each textbook chapter for learners to *do history*. However, the quality of the *doing history* experience provided by each textbook chapter is not necessarily dependent on the number of activities and questions available; rather it depends on the variety of cognitive skills and knowledge dimensions tested, and on the nature of the political education that is inherent in them.

Table 13: Activities and questions per *European expansion and conquest* chapter in each of the three textbooks

Textbook name	Number of activities	Number of individual questions
Oxford In Search of History Grade 10	18	91
Focus History Grade 10	23	104
Viva History Grade 10	15	65

The *Focus History Grade 10* textbook provided the most opportunities to learners to engage with the pedagogical content knowledge of the chapter, and the *Viva History Grade 10* provided the least opportunity. This could suggest varying degrees of commitment to interrogating historical narrative across the textbooks.

4.3 Presenting data for the academic dimension

A more focused analysis is now undertaken to illustrate how and to what extent each textbook chapter interprets and presents the academic project evident in CAPS. This academic project or dimension is represented by the cognitive levels of demand and the knowledge dimensions. I begin by outlining what CAPS demands regarding the academic project, followed by a presentation of the chapter-specific results related to cognitive level and conceptual knowledge frequency. Examples by way of illustration are provided. This is followed by a discussion of the results.

4.3.1 CAPS: levels of cognitive demand

As illustrated by Bernstein's pedagogic device, new knowledge is generated in the field of production; it is debated and deconstructed and then patched together into a curriculum in the field of recontextualisation, and then represented through textbooks in the field of reproduction. Therefore the origin of the school subject, history, lies in the field of advanced academic specialisation. However, school history is not necessarily about creating specialised historians. Although school history is about historical skills and content knowledge transfer, it is also about the development of good citizens for a 'good society' (Carr, 1993).

The History CAPS (2011) tackles the purpose of history as a school discipline in Section 2, entitled *What is History?* Within this section a concise overview of the construct of history is given, firstly through a statement on what the subject is, secondly through a listing of the specific aims of the subject and thirdly through a statement of key historical skills and

concepts that require mastering. It clearly emphasises history as a study of processes of change and development over time. The study of history is to be conducted in a "disciplined" (Ibid. p.8) way through a process of enquiry, which is a recognition of history as a unique discipline. This is supported by specific aims that stress an enjoyment, understanding and appreciation of the past and the forces that help to shape it. In addition, this understanding and appreciation can only be developed through a process of historical enquiry using the skills of history, coupled with an understanding of historical concepts (and concepts from other disciplines; although this is not mentioned in the curriculum document) and the knowledge of how to use historical sources of evidence (Ibid. p.8).

The table below (14) is drawn from the History CAPS and summarises the eight key historical skills identified. I have also included whether the skills promotes the knowing, doing or crafting of history.

Table 14: Table of key historical skills- History CAPS, 2011

History is a process of historical enquiry. A rigorous process of enquiry enables learners to:	
1.	**Understand** the range of sources of information available for studying the past (*knowing*)
2.	**Extract** and **interpret** information from a number of sources (*knowing*)
3.	**Evaluate** the usefulness of sources, including reliability, stereotyping, subjectivity (*knowing and doing*)
4.	**Recognise** that there is often more than one perspective of an historical event (*doing*)
5.	**Explain** why there are different interpretations of historical events and peoples' actions (*knowing and doing*)
6.	**Participate** in constructive and focussed debate through the careful **evaluation** of historical evidence (*doing*)
7.	**Organise** evidence to substantiate an argument, in order **to create** an original, coherent and balanced piece of historical writing (*knowing, doing and crafting*)
8.	**Engage critically** with issues of heritage and public representations of the past and conservation (*doing*)

(Department of Basic Education, 2011)

The process of historical enquiry using the skills of history have been presented in the works of Barton and Levstick (2003) and Seixas (1999) [see Table 15 below]. They present key characteristics of the *doing history* approach. This approach emphasises the skills associated with historical enquiry: being able to select and analyse valid and reliable sources of evidence that present multiple perspectives, using these sources to formulate and answer questions or solve historical problems and then communicating findings in appropriate ways.

I argue that the academic construct of history as presented in the South African History CAPS is a reflection of the *doing history* approach (incorporating *knowing history*) to the teaching and learning of history within South African high schools. There is a clear

correlation between the verbs (to describe the actions of *doing history*) used in the CAPS (Table 14) and those presented by Barton and Levstick (2003) and Seixas (1999) in Table 15.

Table 15: Summary of descriptions of the levels of cognitive demands of the *doing history* approach drawn from Barton and Levstick (2003) and Seixas (1999)

Barton and Levstick (2003)	Seixas (1999)
- **Understand** how history is developed and constructed	- **Construct** valid interpretations of the past through critical enquiry
- **Select, analyse** and **interpret** a variety of primary and secondary sources - **Understand (compare and contrast)** multiple perspectives	- **Assemble**, **select** and **analyse** sources - **Critical understanding** of texts- primary and secondary sources
- **Formulate** open-ended questions about the past	- **Formulation** of open-ended questions
- Interrogate claims through an interrogation of evidence - **Communicate** conclusions through a variety of means	- **Interpret** and **present** historical problems

Discussion

The History CAPS says that learners need to strive for an understanding of content knowledge and skills (listed in the Specific Aims; p.8 of the History CAPS). In this we see that an important element of the *doing history* construct is also the importance of *knowing history*. All assessment tasks must assess both these components. Primarily, competence in these two aspects must be displayed in written form, although there is place for other means of communication, such as verbally or visually. The ability of a learner to select, arrange and connect evidence to solve historical problems through assessment tasks needs to be displayed. Formal assessment tasks must assess a range of cognitive skills identified in the Revised Bloom's Taxonomy that align with historical skills. This enables a greater degree of alignment between the development of a learner's cognitive development and the curriculum (Anderson, 2005).

Table 16 below, adapted from the History CAPS (2011) shows the hierarchy of cognitive levels (1= lower order to 3= higher order) and associated historical skills.

Table 16: Cognitive levels and associated skills to be assessed in formal source-based history assessment tasks for Grade 10

Cognitive levels	Skills to be assessed
Level 1- 40%	• **Extract** evidence from sources **(Identify)**
Level 2- 40%	• **Explain** historical concepts • Straightforward **interpretation** of sources • **Identify** what is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source? • **Compare** information in sources **(Comprehend)**
Level 3- 20%	• **Interpret** and **evaluate** information and data from sources • **Engage** with questions of bias, reliability and usefulness of sources • **Compare and contrasts interpretations** and **perspectives** within sources and by authors. **(Interpret and evaluate)**

(Department of Basic Education, 2011)

At Grade 10 level, according to the History CAPS, when constructing formal assessment tasks it must be ensured that a weighting of 40% (level 1), 40% (level 2) and 20% (level 3) is adhered to. A skill that appears to be missing from the key historical skills to be assessed listed in the History CAPS, but which is identified by Seixas (1999) as being one at the core of the *doing history* approach, is that which asks learners to construct historical accounts and valid interpretations of the past. This skill would appear to align with the highest level of cognitive process dimensions identified in the Revised Bloom's Taxonomy (Anderson, 2005); namely to *create*. Its absence could be as a result of the use of the original Bloom's Taxonomy in the construction of the three levels, rather than the Revised Bloom's Taxonomy. If the original Bloom's Taxonomy has been used, possibly we are to assume that implicit in the cognitive level of evaluation is the skill to create an argument regarding a historical problem. However, this assumption is tentative. Or, are we to assume that the South African history curriculum writers consider the creation of historical knowledge to be a 'bridge too far' for South Africa learners? Is this cognitive level the preserve of those within the field of production? An answer to these questions lies in what one sees as being the creation of historical knowledge. A learner creating an essay that offers a clear conceptual explanation of a historical event, drawing on sources provided is expected within the South African school context; but not creating historical knowledge by finding and analysing new sources to create original theories.

I also observe that in the *doing history* approach stressed by Seixas, and Barton and Levstick, they identify another key historical skill as being the ability to formulate open-ended questions about the past. Again, what's interesting is the absence of this particular skill in the list of key skills for assessment in the Grade 10 History CAPS. A reading of the History CAPS shows that it is not required for Grade 11s or 12s either.

It appears then that the History CAPS have sought to re-impose the disciplinary nature of history as a subject within schools through a re-emphasis on the pedagogical content knowledge proposed by the *doing history* approach. We see this in the History CAPS in the list of unique skills of history. This approach appears to reflect broadly what historians (of the dominant paradigm) do in the field of production.

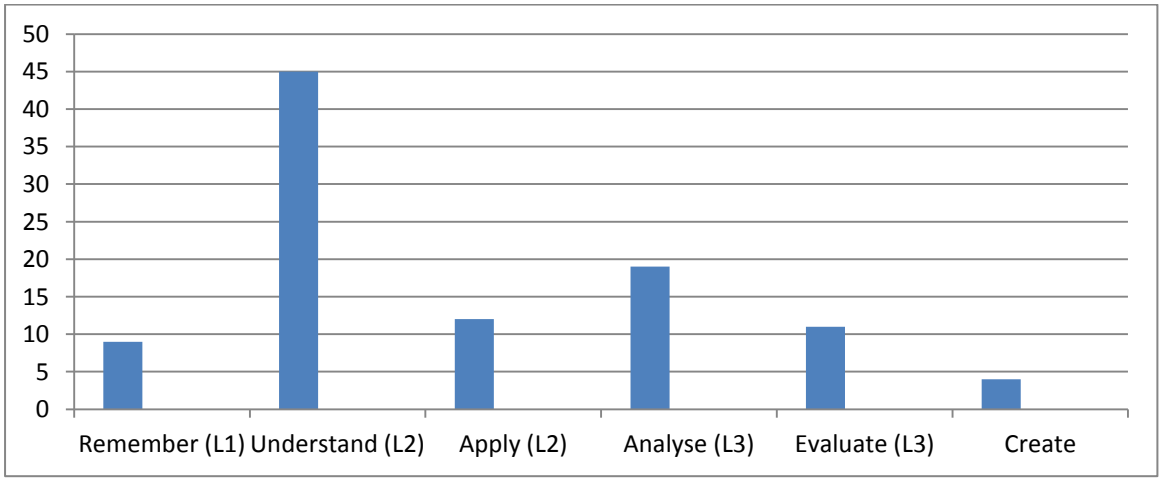
I now present what the textbook chapters reveal about how the authors have interpreted the academic project inherent in the history CAPS with regards to cognitive level spread and conceptual knowledge.

4.3.2 Textbooks: levels of cognitive demand

The three graphs below encapsulate the percentage of questions reflecting the different cognitive levels of demand required in each of the textbooks. The Grade 10 History CAPS (p.33) specifies a 40/40/20 percent split for the division of cognitive levels for assessment. 80% of the questions should test Levels 1 and 2 cognitive skills (extraction, comprehension and application), while 20% should test the Level 3 cognitive skills of analysis and evaluation.

Graph 1: *Oxford History Grade 10*:

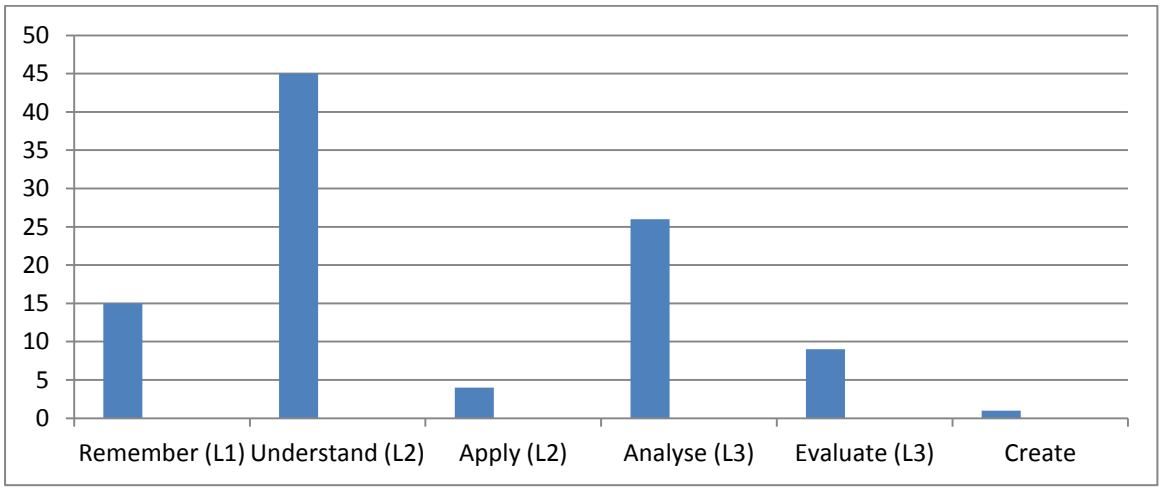
Frequency (percentage) of different cognitive levels across Unit 2 activity questions



According to Graph 1 above, the *Oxford History Grade 10* Unit 2 activities spanned the range of Revised Bloom's cognitive levels and by extension all three cognitive levels stressed by the Grade 10 History CAPS, as well as a small number of activity questions that directly ask learners to plan, create and communicate own historical knowledge. However, there was a mis-alignment in cognitive levels prescribed by CAPS and the spread of cognitive levels as they occurred in this textbook chapter. Instead of 40/40/20, the percentage split is 9/57/34.

Graph 2: *Focus History Grade 10*:

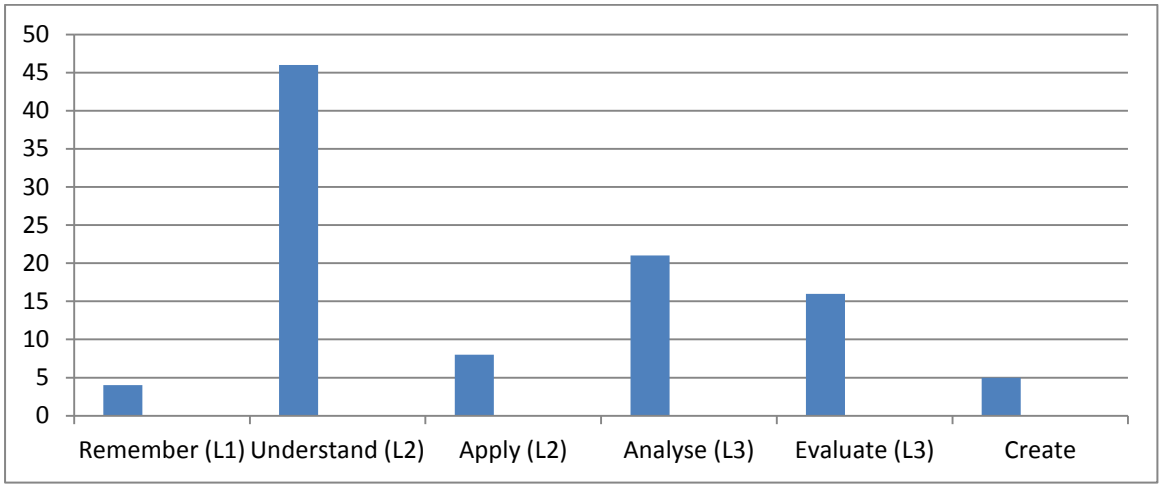
Frequency (percentage) of different cognitive levels across Unit 2 activity questions



As with the *Oxford History Grade 10 textbook*, so the *Focus History* textbook also covered a range of Revised Bloom's cognitive levels as required by the History CAPS. However, again there was a lack of alignment in cognitive levels emphasised by CAPS and this textbook chapter. Instead 40/40/20, the percentage split is 15/49/35.

Graph 3: *Viva History Grade 10*:

Frequency (percentage) of different cognitive levels across Unit 2 activity questions



The *Viva History* textbook also covered the full range of Revised Bloom's cognitive levels as required by the History CAPS. The percentage split is 4/53/37.

Discussion

The data reveals a similar pattern across the three textbook chapters regarding the spread of cognitive levels (See Graph 4 and Table 17 below). Most questions in all three chapters appear to test the cognitive skills of understanding and application. A substantial number also focus on analysis and evaluation type questions. The least focus is on those at opposite ends of the hierarchy, namely questions that test the skill of remembering and extraction, and the ability of learners to create their own knowledge.

Graph 4: Percentage of questions per textbook chapter that correspond to Grade 10 History CAPS cognitive levels

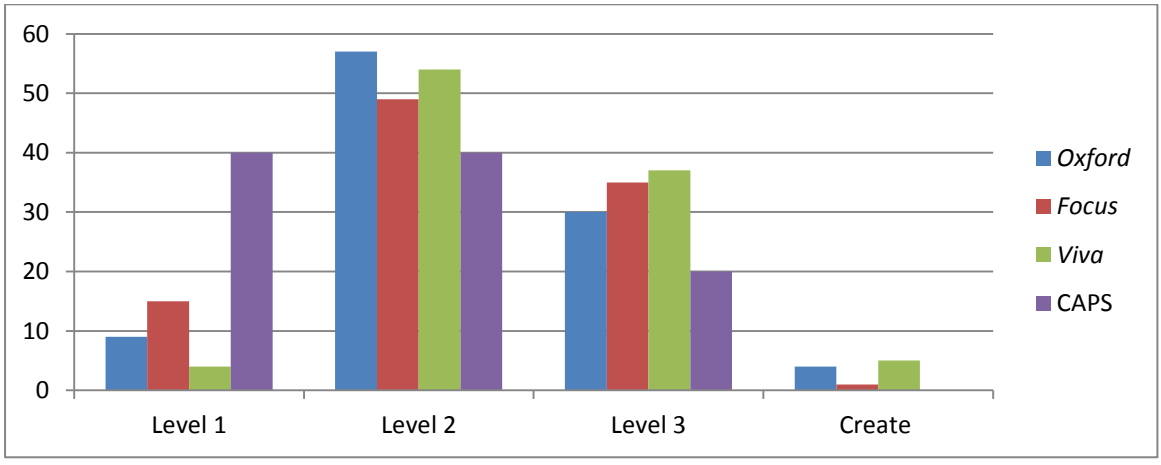


Table 17: Percentage of questions per chapter that correspond to the CAPS cognitive levels

Textbook name	Level 1 (40%) (Remember)	Level 2 (40%) (Understand and Apply)	Level 3 (20%) (Analyse and Evaluate)	Create
Oxford	9%	57%	30%	4%
Focus	15%	49%	35%	1%
Viva	4%	54%	37%	5%

It is clear from Table 17 and Graph 4 above that the spread of cognitive levels in the chapters does not correspond with that suggested in CAPS. The relative cognitive demand of all the chapters is quite far above that suggested in the Grade 10 History CAPS. But in my opinion, that may not be a problem. Maybe it is positive that within the Level 1 and 2 categories (lower order skills) there is more emphasis on the skill of understanding than of remembering and that there is more emphasis on analysis than specified by CAPS. However, even if the cognitive levels in this chapter do go beyond the minimum requirements suggested in the History CAPS, I need to bear in mind that they could correspond if I were to analyse all the chapters of each textbook. [2]

An effort is made across all three chapters to test both lower order and higher order skills, without a heavy focus on the 'very easy' or the 'very hard'. An issue arises concerning the nature of the unique skills of history. The skills of extraction, remembering, understanding and application could be construed as 'generic' academic skills not really unique to history as a school subject. School subjects other than history require learners to show competence in these skills; whereas an ability to analyse and evaluate the worth of sources of evidence appears to be predominantly confined to history as a school subject.

Therefore, the greater emphasis on Level 3 skills (much greater than 20%) unique to school history is pleasing to see, and I argue that within the chapters under review a more rigorous attempt is made to expose learners to what historians (and other social scientists) do than the History CAPS proposes should happen. By extension, I posit that the textbooks attempt to improve on, or go beyond the curriculum specifications in a positive way.

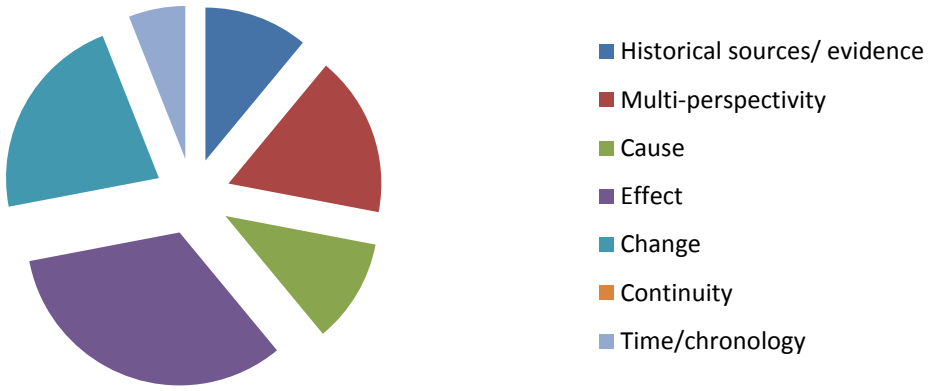
[2] Therefore the generalizability of the statistics beyond the chapter under investigation is not possible. The statistics are included to provide a baseline from which to judge the general rigour of historical thinking within the chapters under review.

4.3.3 Textbooks: conceptual knowledge dimension: quantitative data

I have sought to quantify the conceptual knowledge focus (as a component of the academic dimension) in each textbook chapter by analysing each heading associated with every activity. This entailed drawing out key words, phrases or synonyms reflective of the key concepts as they are stated in the History CAPS (see Table 8, page 54). I have sought to display the frequency of occurrence of key concepts in graphical form. In order to demonstrate my decision making with regards to determination of knowledge focus, I provide examples later on.

Oxford History Grade 10- Conceptual knowledge

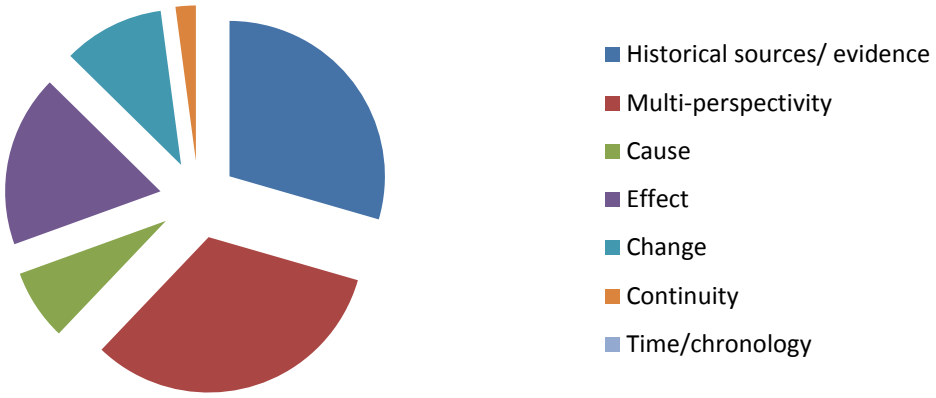
Graph 5: *Oxford History Grade 10*: Conceptual knowledge focus



In the *Oxford* textbook (see Graph 5 above) learners are predominantly asked to engage in developing an understanding of multi-perspectivity and issues of bias and reliability of sources inherent in this, effect or consequence, change and what historical sources of evidence are and how to use them. However, there is no explicit activity focus on the concept of continuity in history, and limited focus on chronology and cause.

Focus History Grade 10- Conceptual knowledge

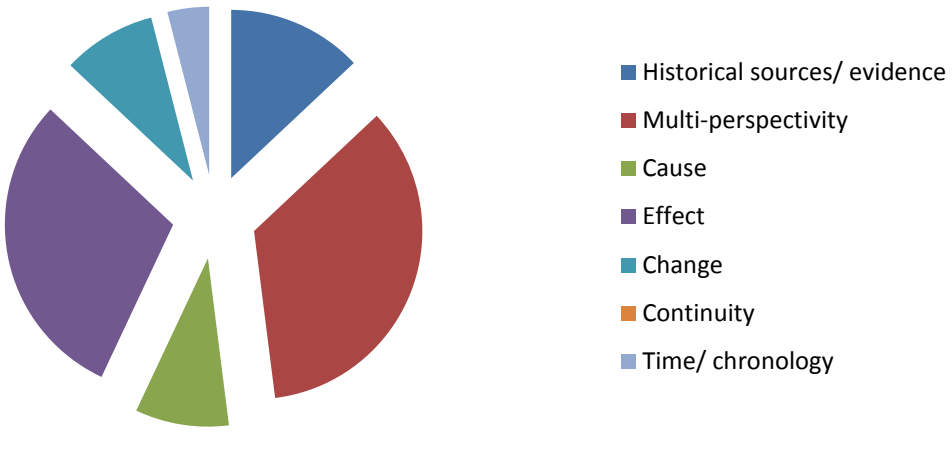
Graph 6: *Focus History Grade 10*: Conceptual knowledge focus



The *Focus* textbook chapter also covers an array of historical concepts. The main conceptual knowledge focus is on understanding multi-perspectivity, working with historical sources and effect or consequence of historical processes. There is no reference within any of the activity headings to developing an understanding of chronology, while only limited focus is evident on understanding continuity and cause.

Viva History Grade 10- Conceptual knowledge

Graph 7: *Viva History Grade 10*: Conceptual knowledge focus



In the *Viva* textbook the main conceptual focus is on understanding multi-perspectivity, effect or consequence, and working with historical sources. There is no focus on continuity as a historical process and limited focus on issues of chronology, cause and change.

Discussion

The tasks in the textbook chapters clearly foreground the development of conceptual knowledge. The conceptual knowledge focus of the three chapters reflects distinct similarities. In all three textbooks, understanding multi-perspectivity is emphasised, as well as understanding consequence or effect. This is significant as multi-perspectivity is fundamental to what it is that historians do. The *doing history* approach foregrounds the understanding of multiple perspectives (Barton and Levstick, 2003), as does the History CAPS in linking the understanding of this concept to the Level 3 cognitive skill that tests a learners ability to compare and contrast interpretations and perspectives within sources. The content of the chapters under review (early European colonisation) also lends itself to developing learner understanding of consequence or effect. Least emphasis across all three textbook chapters is placed on continuity and chronology. Again, I ascribe this to the content focus of the chapter that does not necessarily lend itself to a focus on these concepts.

A perusal of the individual activity questions also suggests a focus on factual knowledge which is understandable within the context of school history as a discipline. The occasional appearance of individual questions that requires metacognition was evident as well (see section 3.7.1 of Methodology chapter). This means that on limited occasions some textbook exercises ask the learners to explicitly contemplate about how to think about issues of bias or reliability within the framework of the *doing school history* construct.

Focus on procedural knowledge in activity headings seems to be lacking. While learners are asked to analyse sources, it would be difficult to argue that there are specific set-out techniques or procedures to do this in History; unlike in Mathematics or Sciences where strict, pre-determined protocols are required to complete tasks. History may have a framework for source analysis, but not necessarily a fixed procedure.

4.3.4. Textbooks: conceptual knowledge dimension: qualitative data

Below I provide examples of my decision-making in support of my contention that the activity headings in the textbook chapters focus on conceptual knowledge, rather than procedural knowledge. It could be contended that the activity headings are not necessarily reflected in the individual activity questions. As such, I have included individual activity questions in two of the examples presented to demonstrate that there is an alignment between activity heading and individual activity questions. The following examples show the

conceptual knowledge focus and textbook reference, then the activity heading as it appears in the textbook, followed by the individual task questions as they are in the textbook exercise. In italics I then provide my own comment that serves to justify my own decision making.

Example of bias and reliability (*Focus History Grade 10*, Activity 5, p. 51).

Activity heading: Evaluating the reliability of sources.

1. Write down a good definition of the transatlantic slave trade.

2. Rewrite this table into your exercise book. Summarise the opinions in Sources G-J on the role of the African kings in the slave trade.

Source	**Author of source**	**Opinion**
Source G		
Source H		
Source I		
Source J		

3. Which source do you find most appealing in its argument? Give a reason why.

4. To what extent do you think each source is biased or one-sided in its opinion?

5. If you were an historian, how would you go about finding out which of the sources is more reliable or trustworthy?

My comment: *I argue that the activity heading above and what the learners are required to do to develop an understanding of bias, is conceptual and not procedural knowledge. Learners are required to develop an understanding of what bias is, how it is manifested in sources and how it impacts on the reliability of sources. An understanding of sources and how to work with them is necessary. The concepts of bias and reliability would need to be understood and worked with within a guiding framework, but not through following strict procedures. Such a framework could be as follows:*

A framework *for evaluating source reliability*

- Study the origin of the sources- look at who created it, where it was created and when it was created- Can a specific bias be determined?

- Look at the words used in the source- are they emotionally-laden adjectives and other descriptive words? Can a specific bias be determined?

- Does the source content clearly favour one side over another or is an attempt made to be balanced in point of view? Which facts have been chosen and which have been left out?

Learners could determine this through reference back to the textbook text or through teacher scaffolding.

The framework above suggests steps to be followed by a learner answering the questions. However, depending on what kind of source it is, these steps may or may not be relevant, or may not be able to be determined by the learner without help from the teacher or support material like a textbook. If these steps are relevant they do not necessarily need to be adhered to in the order I have put them. Therefore, while a framework is available to learners to develop conceptual knowledge related to working with sources, procedural knowledge is not developed alongside the conceptual knowledge.

Example of multi-perspectivity (*Oxford History Grade 10*, Activity 1, p. 39).

Activity heading: Analyse debates about the reasons for European expansion.

Question 1 of activity: Identify the different arguments about the reasons for European expansion.

My comment: *This activity heading suggests that learners need to understand the concept of multi-perspectivity, which implies an understanding of the idea that historical interpretation is open to debate. This concept is re-enforced by the first question of the activity which asks learners to show their understanding of the concept of multi-perspectivity by identifying debates around reasons for European expansion.*

Example of effect or consequence (*Focus History Grade 10,* Activity 7, p. 53, question 3).

Activity heading: Using sources to work out the impact of slave trading.

Question: Use Source B and Source C, as well as the text in this unit to answer the following questions.

3.1. What short-term effects do you think slavery had on slaves?

3.2 What short-term effects do you think slavery had on slave owners?

3.3 What long-term effects do you think slavery had on slaves?

3.4 What long-term effects do you think slavery had on slave owners?

Comment: An understanding of the concept of effect or consequence is required to adequately complete this activity. The questions also require a learner to develop an understanding of the idea that even within the broad concept of effect, a deeper understanding of the sub-concepts of short and long-term effects are required, as well as an understanding of the concept from differing points of view; namely that of the slave and master. Clearly the individual activity questions reflect that suggested in the activity heading.

The examples provided above demonstrate that the questions within the activities do reflect the essence of activity headings. This suggests that three textbooks under review adequately create a foundation for the potential transmission of conceptual knowledge understanding to learners. However, I do acknowledge that time constraints precluded an in-depth analysis of each activity question in relation to the activity headings. [3]

Conclusion

The data presented on the academic dimension focused on the cognitive levels and the knowledge dimensions reflected in the assessment tasks in the three textbook chapters under investigation. Across the assessment tasks in the three chapters similarities were evident in the spread of cognitive levels. All three textbook chapters show a cognitive rigour above that suggested by the History CAPS. And regarding knowledge dimension, activity headings in all three chapters focus greatly on conceptual knowledge (predominantly multi-perspectivity and consequence) rather than factual or procedural knowledge

[3] This would need to be conducted in the event of an extension of this research in the future.

Let me now shift my focus from the academic dimension to the political dimension findings.

4.4 Presenting data for the political dimension

First I present what the History CAPS shows regarding the political project. This is followed by an overview of the political stance inherent in the individual textbook and chapter introductions in an attempt to uncover whether a particular historical narrative is evident, as well as to determine how the authors intend to put history to use in the present. I then present the data on the political dimension as it has emerged from the relevant chapters in the textbook teacher guides. This will reveal how and to what extent the past is put to use by the authors.

4.4.1 What does CAPS ask for?

As with the National Curriculum Statement (2002), it is worth noting that an emphasis on citizenship education over and above historical skills and knowledge is still very much a feature of the History CAPS introduced in 2011. The foreword of the CAPS draws a reader's attention to the Preamble to the Constitution that clearly states the purpose of the Constitution as a vehicle for healing past divisions, establishing a democratic society and building a united South Africa. The History CAPS goes on to state that, "Education and the curriculum have an important role to play in realising these aims" (Foreword- CAPS, 2011). These aims are re-emphasised within the *General Aims of the South African Curriculum* (CAPS, 2011, pp. 4-5), as well as in the section entitled *What is History?*(Ibid. p.8).

Emphasis is given to the need for the curriculum to drive social transformation in an effort to correct educational imbalances (Ibid. p.4). What these educational imbalances are is not specified, so my assumption is that they could include correcting ideological imbalances from the pre-1994 curriculum that promoted a Euro-centric historical narrative. The document goes on to stress the need for "…active and critical learning, rather than rote and uncritical learning of given truths" (Ibid. p.4). Education for human rights, inclusivity, environmental and social justice, and sensitivity to issues of diversity; poverty, inequality, race, gender, language, age and disability are also stressed on page 5 of the History CAPS. Understanding the importance of indigenous knowledge systems is also foregrounded (CAPS, 2011, p.5), as well as a need for the curriculum to reflect the perspectives of a broad social spectrum, for example women (Ibid. p.8). Raising social concerns through the asking of questions, as well

as the promotion of human rights, peace and challenging prejudices is also stated (Ibid. p. 8). The political project in the History CAPS is thus clear.

How then do South African history textbooks seek to transmit this political project?

4.4.2 Textbooks: political stance

Here I undertake a review of the textbook and chapter introductions. The textbook introductions refer to the introductions to the textbooks as a whole, and the chapter introductions refer to the specific introductions for the *European expansion and conquest in the 15th to 18th centuries* chapters in each of the three textbooks and accompanying teacher guides. This is to determine how the three textbooks intend to use history in the present as a vehicle for citizenship education, as well as to determine what historical narrative dominates and if it differs across the three textbook chapters, and also whether an implicit or explicit political agenda is evident in the data.

Oxford History Grade 10- Political stance

At the beginning of the *Oxford* learner book we are not presented with any statement of how the book sees history as a school subject. The book's introduction is dominated by schemes of content and assessment. However, the chapter introduction provides a sense of how the authors see history and the historical narrative at play. They appear to present a particular narrative that is implicitly anti-Eurocentric in nature ("…around 1600 Europe was no more powerful than other parts of the world…" p.34) and that stresses the negative consequences of European colonisation on Africa; Europeans had "… a devastating effect on African societies" (p.34). This aligns with the implied intention in CAPS to re-address imbalances of the past.

A dominant feature of the topic introduction is a large picture by a Mexican artist, Diego Riviera (see below), which emphasises the negative consequences of Spanish rule in Central America. The picture follows three paragraphs that introduce the new topic. It is not used as a source for analysis, and is not accompanied by any questions or points for discussion. We see scenes of Indians being branded with hot irons, forcibly converted to Christianity, executions of Native Americans and slaves, as well as scenes of slaves being whipped. While based on historical fact, the picture appears to re-emphasises a particular anti-colonial narrative in this chapter, although there is an effort by the authors to stress that history is about debate between different perspectives (p.36), and that historical perspectives are transitory in nature.

Whether this commitment to multi-perspectivity is 'lip-service' or not within the broad narrative of the chapter needs to be determined.

Figure 2: A mural by Mexican artist, Diego Rivera, painted in the early 20th Century. A copy of this mural appears on page 34 of the *Oxford History Grade 10* textbook



Focus History Grade 10- Political stance

The *Focus History Grade 10* learner book lacks an explanation of what history is. The accompanying teacher guide is more specific, but it does no more than repeat what is in the History CAPS document. On the surface we are then led to believe that this textbook ascribes to the *doing school history* construct. As one progresses to the topic introduction in the teacher guide we are provided with a clearer focus for the chapter.

> "The focus is on the early processes of colonisation and the consequences on the colonised societies, on ideas of racial superiority and on the balance of power in the world" (p.39 of *Focus Grade 10* teacher's guide).

In itself this topic statement does not suggest any particular bias as it contains no reference to any specific group of people or nation, except to mention 'colonised societies', and no indication is given for whether consequences on these societies are positive or negative. This implies space for learner debate on the issue; a positive within the context of the *doing school history* construct. Within the case studies of the topic we get a more explicit sense of a particular historical narrative.

> "The case studies in this topic are:
>
> - The Spanish conquest of America
>
> - Portugal's destruction of Indian Ocean Trade on the east coast of Africa.
>
> - The Dutch East India Company's colonisation of the Cape" (p. 39 of *Focus Grade 10* teacher's guide).

Use of words and phrases like 'Portugal's destruction of …' suggest again a historical narrative that is anti-colonial in nature.

Viva History Grade 10- Political stance

Unlike the previous two textbooks and teacher guides, there is more emphasis on what history is in the *Viva* learner book introduction and topic introduction. This is significant as it exposes learners and teachers to the authors' notion of history.

On page 6 of the *Viva History Grade 10* learner book it is stated that history is a subject of "investigation", and that there are always "…two sides to a story, however much evidence is strong one way or another". No explanation is provided as to who decides which evidence is 'stronger'. It does suggest a view of history that values multi-perspectivity and debate. The learner book also emphasises values of historical empathy with the purpose of revealing our common humanity and that there are more "similarities than differences between us" (p.6). This could suggest a reconciliatory narrative driving the political stance of the chapter under review. There is also an emphasis on understanding historical cause and effect with the purpose of creating strong links to our past, even in the present (Ibid. p.7).

However, there appears to be a diversion from the principles of multi-perspectivity and the idea of 'two sides to a story' where we are given a somewhat biased statement that shows the intended historical narrative followed in the chapter. Learners are told that they will learn about "…the ruthlessness of the Portuguese and Spanish…" (p. 53) and how this "…in

particular, led to total conquest" (p.53). The emotional language (*ruthlessness*) as well as the use of generalisations illustrates this bias. This could suggest a rift between theory (what the textbook says about history) and practice (how the chapters, activities and answer guidelines are constructed). An alternative way to view this use of emotional language could be to suggest that, in fact, Spanish and Portuguese action was ruthless in many instances. Here the word *ruthlessness* could be an accurate adjective of description. However, the use of generalisation in describing Spanish and Portuguese action may still suggests a particularly bias or pre-determined narrative.

The learner book chapter introduction goes on to highlight "values" (p.53) that learners will come to appreciate after working through the chapter; values such as…

> "- the suffering of indigenous people because of colonisation
>
> - how colonisation was a gross violation of human rights
>
> - that racial discrimination is worth fighting against
>
> - the danger of greed
>
> - the importance of IKS." (p.53)

How they determine whether learners will appreciate these values is not clear. And can we even refer to suffering as a value? A focus on determining whether a learner has achieved an appreciation of 'values' like these appears to echo problems reminiscent of the outcomes-based approach.

This chapter, like the other two, appears to propose a pre-determined historical narrative that is anti-colonial in nature. The political analysis of the data hopes to determine how strongly this type of narrative is supported in the assessment tasks, particularly within the suggested answer guidelines provided in the teacher guides.

Conclusion

I argue that a similar pre-determined anti-colonial narrative is evident in all three learner and teacher book chapters under review. Reference back to the political stance portrayed in the History CAPS suggests that an anti-colonial narrative is acceptable. Such a narrative could help to uncover past abuses and give a voice to those who were silenced in the past. This aligns with the History CAPS' intention to correct past educational imbalances by educating for human rights and social justice. But, an important question to consider later is whether an

emphasis on a particular narrative, whatever it may be, interrupts "…active and critical learning" (CAPS, 2011, p.4) and encourages "…rote and uncritical learning of given truths" (Ibid. p.4)? If the answer is yes, then certain academic and political aims of the History CAPS may be in conflict with one another.

4.4.3 Textbook answer guidelines: political stance- quantitative and qualitative data

Quantifying the political message in all its complexity was challenging. Coding focused on the answer guidelines provided in the teacher guides. The essential question that arises out of Wertsch's categories of history and collective memory is whether we see textbooks and their teacher guides as forums for discussion or as temples to commemorate a particular view of history. Or, can they be both?

In the coding, I categorised the answer guidelines according to Wertsch's two broad categories and their respective sub-categories (see Table 19). The graphs displayed show the prevalence of the two broad categories. I will draw on specific examples from the teacher guides to show how the different Wertsch sub-categories are manifested in various ways. Below, I again present Wertsch's (2002) Table of Collective Memory and History as a reminder.

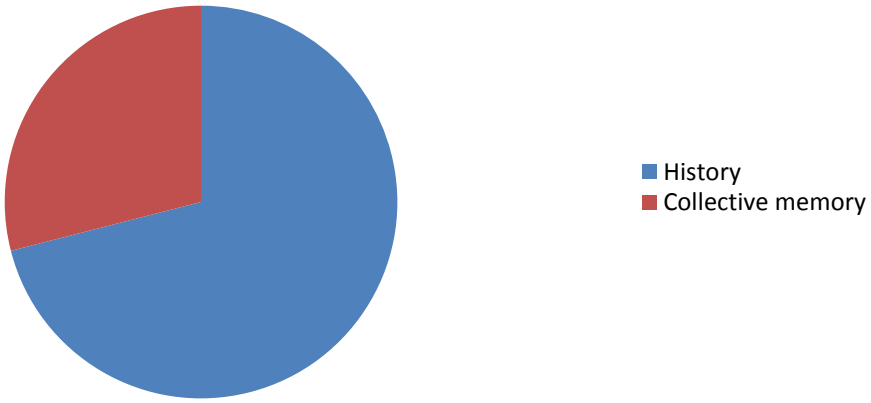
Table 18: Collective Memory and History (Wertsch, 2002, p.4)

Collective memory	History
"Subjective"	"Objective"
• Single committed perspective • Reflects a particular group's social framework • Unself-conscious • Impatient with ambiguity about motives and the interpretation of events	• Distanced from any particular perspective • Reflects no particular social framework • Critical, reflective stance • Recognizes ambiguity
Focus on stable, unchanging group essence	Focus on transformation
Denial of "pastness of events" • Links the past with the present • Ahistorical, anti-historical	Focus on historicity • Differentiates past from the present • Views past events as taking place "then and not now"
Commemorative voice • Museum as a temple • Unquestionable heroic narratives	Historical voice • Museum as a forum • Disagreement, change, and controversy as part of on-going historical interpretation

Oxford History Grade 10- Wertsch categories

Within the Oxford Grade 10 History teacher-guide chapter, I coded ninety-one individual questions in total drawn from eighteen activities. Graph 8 below presents the prevalence of the two Wertsch categories in the *Oxford History Grade 10* teacher guide across the ninety-one individual questions.

Graph 8: Prevalence of Wertsch categories: *Oxford History Grade 10* teacher guide



For the *Oxford History Grade 10* teacher guide, I determined that the percentage prevalence of the history category was 71%, and the collective memory category prevalence equated to 29%.

Wertsch's history category is represented in the *Oxford* publication through an emphasis on the transformational nature of historical perspective, attempting to counter-act *presentist* thinking, and answer guidelines that are distanced from a particular historical perspective.

Wertsch's collective memory category is represented in the *Oxford* teacher guide through a limited acknowledgement of the origin of historical sources, resorting to the use of generalisations, an emphasis on a particular narrative which suggests a denial of ambiguity in historical interpretation and the presence of elements of *presentist* thinking.

What follows are examples that typify my decision-making in the coding process.

Examples of History category- *Oxford History Grade 10*

Example 1: The transformational nature of historical perspective.
(Think and discuss task, p. 36 of learner book and p.29 of teacher guide).

THINK AND DISCUSS: Why do you think interpretations of history change over time?

Answer guideline: "It is important to understand that history is a dynamic subject which is continually changing. This is because:
- Interpretations are constructed from evidence and different historians choose to highlight some things over others. This choice will lead to differing explanations…."

My comment[4]*: This task and answer guideline falls into Wertsch's history category as it clearly recognises the transformative nature of historical thinking, ambiguity of perspective, or disagreement, and change and controversy as characteristics of historical thought. In acknowledging and respecting diversity of opinion there is an alignment to the curriculum aim of using history as a tool to promote respect for diversity and democracy.*

Example 2: Attempting to counter-act *presentist* thinking.
(Think and Discuss task, p. 53 of learner book and pp.33-34 of teacher guide)

THINK AND DISCUSS: In those days, people did not have the same ideas about human rights that we have today. Does this mean that we can excuse the terrible way that people acted towards others in the past? Is it right to judge actions in the past by modern standards?

Answer guideline extracts: "…It is important not to judge the people of a past time by the norms (standards) of today. Most people today have a strong belief in the importance of human rights…But in the 16th century this was not what people believed…There was no concept of human rights…However, some could argue that crimes against humanity are unacceptable at any time…"

My comment: *This answer focuses on historicity and clearly tries to differentiate past from*

[4] These comments, as they occur in all examples, represent my decision-making in the coding process.

the present. This has the impact of counter-acting what could be termed ahistorical thinking that could guide learners to a simplistic understanding of the past as a consequence of our modern day stress on human rights and sensitivity to human rights abuses. While such a focus on morality is important for learners to grapple with, it needs to be balanced against the need to promote historical thinking within the discipline of history. The answer also acknowledges that there could be differing opinions on the subject, again emphasising the multi-perspective nature of historical thought.

Example 3: Tasks that seek to keep distanced from a particular narrative.
(Activity 2, p. 57, question 6)

Imagine you are a Dutch official at the Cape. Write a few diary entries (about 400 words) commenting on the different kinds of work slaves are doing at the Cape. In it show your knowledge of where the slaves come from, how they are treated, and the different kinds of skills they have.

Answer guideline extracts: "…Stress to learners that, when given a creative task like this, they still need to include as much factual detail as possible. They should write as if they are the official concerned…"

My comment: *Here is an attempt made to 'humanise' a colonial authority figure even within a broader anti-colonial narrative through an empathy task. It goes some way to suggesting an alternative narrative to that which presents the simplistic stereotype of the 'bad colonialist', in that it provides scope for learners to reflect on the complex nature of Dutch attitudes towards slaves. There are instances in the textbook text and sources associated with this task that suggest more positive treatment of certain slaves. With additional research factual evidence could be found that shows differing treatment of slaves in the Cape. This promotion of a critical, reflective stance places this example within Wertsch's history category. CAPS suggest as well that such empathy tasks be used to foster reconciliation between groups in South Africa that were previously in conflict with one another.*

Example 4: Answer guidelines that demonstrate a commitment to multi-perspectivity.
(Activity 3, p. 53, question 5)

How would life have changed in the Swahili city states once the Portuguese took over? Answer guideline: Answer provided is extensive and outlines at least 8 different consequences of Portuguese rule, both positive and negative. ***My comment:*** *This commitment to exposing learners to the complexity of historical processes is an attempt to show the ambiguity of historical perspective that would require a critical, reflective stance from learners. An emphasis on both negative and positive consequences shows recognition of ambiguity of historical understanding. Possibly such a complex answer might be unrealistic to expect from Grade 10s, but it does allow for the teacher to impart additional knowledge to the learners which will sensitise them to the depth/variety of substantiation required in doing history. Clear formulation of opinions by learners as well as a respect for different interpretations again lends itself to the inculcation of democratic values stressed in the History CAPS.*

Examples of Collective Memory category- *Oxford History Grade 10*

Example 1: Denial of ambiguity in historical interpretation.
(Activity 1, p. 39, question 2)

Many people think that history is about dates and facts that never change. How does what you read in the text show this view to be incorrect? Answer guideline: This view is incorrect because history is more about understanding why things happened. Historians have different interpretations and these interpretations change over time depending on the historian and what sources are used. ***My comment:*** *On the surface, it appears that this answer guideline supports the notion of ambiguity in historical interpretation, but ironically it denies learners the chance to debate their own notion of what history is. A statement is made that dictates to learners what the correct way is to interpret history as a discipline. According to the author, one single committed perspective on the nature of history is correct and the other is not.*

Example 2: The presence of elements of *presentist* thinking.
(Activity 1, p. 41, question 3)

Some people see this period as the beginning of **globalisation**. Use Source A and the map on p. 38 to explain why they would say this.

Answer guideline: Globalisation involves increased contact and trade between people all around the world. *Source A* shows the food items which were traded across the Atlantic and which have become known worldwide. Our diets have changed and today include all these foods. The table also shows the spread of disease. The map shows how all the continents are now connected via sea trade routes. Although at the time it took a long time to travel from ones side of the world to the other, it is now commonplace and swift…

My comment: *Here the learner is tasked with drawing on their own knowledge about current global economic and social processes (Globalisation) to understand the past and the present. The learner is encouraged to create a dialogue showing how the past and present 'talk to one another' in an effort to link the past with the present. Within Wertsch's collective memory category this suggests a denial of the 'pastness of events' which reflects thinking that is ahistorical. However, I do acknowledge that some historical thinking could be encouraged, as such a dialogue between the past and the present could, if well directed, draw out discussion of cause and effect and time taken for change to occur.*

Example 3: Limited acknowledgement of the origin of historical sources.
(Activity 3, p. 45, question 1)

What is the value of statistics, such as those mentioned in the first paragraph on page 44?

Answer guideline: These statistics show us the result of colonialism as a maximum of 4% of the population survived (96% died!). They show that the massive decline in population figures occurred in the Caribbean as well as Mexico, so the horror was widespread. Even if the figures are approximations (rough calculations), they are still devastating. The Spaniards brought smallpox which in places killed up to 90% of the indigenous people.

My comment: *No indication is provided of the origin of these figures. Learners are asked to*

assess the value of this information, but in a complex task such as this value can only be fully determined after an analysis of the source attribution to determine reliability. No opportunity is provided for learners to do this. Learners are required to accept the sources as being accurate and valuable. Learners would then behave unself-consciously rather than adopting a critical, reflective stance. Possibly the answer guideline needs to be clearer about what the characteristics of a 'valuable' source are. Is a valuable source one that is useful, reliable and valid?

Example 4: Using generalisations.
(Activity 4, p. 47, question 1).

Why were slaves introduced into the Americas?

Answer guideline: The crops that grew well in the Americas, like sugarcane, cotton and tobacco needed to be grown in large plantations. This kind of farming needed great numbers of labourers… The slaves provided cheap labour, were overworked and underfed, and worked in brutal conditions.

My comment: *This answer encourages an uncritical view of a key historical process, in this case, slavery. The purpose of this comment is not to deny that many slaves were cruelly treated nor to argue that slavery is ever okay, but that treatment differed from master to master and according to what jobs slaves were required to perform. The use of slave labour in the Americas was complex. Generalisations which state that all slaves were treated brutally encourage a simplistic analysis of a key historical process. The generalisations inherent here stress the presence of Wertsch's collective memory category as an uncritical and non-reflective stance regarding a key historical process is encouraged in learners. But, I do acknowledge the development of a collective memory that stresses, even through simplification, the evil of slavery (American, African or modern) could be considered an acceptable/desirable use of history in light of the political project in CAPS to encourage awareness of human rights abuses. What this issue has highlighted to me is the complexity inherent in teaching the topic of slavery. The question that arises is whether everything is questionable/ debatable within the doing history construct, even evil processes like slavery, genocide or racism?*

Example 5: The emphasis on a single committed perspective.
(Activity 4, p. 47, question 3)

Divide the class into four groups…Each group should discuss one of the topics given below in relation to this question: "How did colonisation and slavery change society in the Americas?"

- The economy…
- Health and diet…
- The composition of the population…
- Culture…

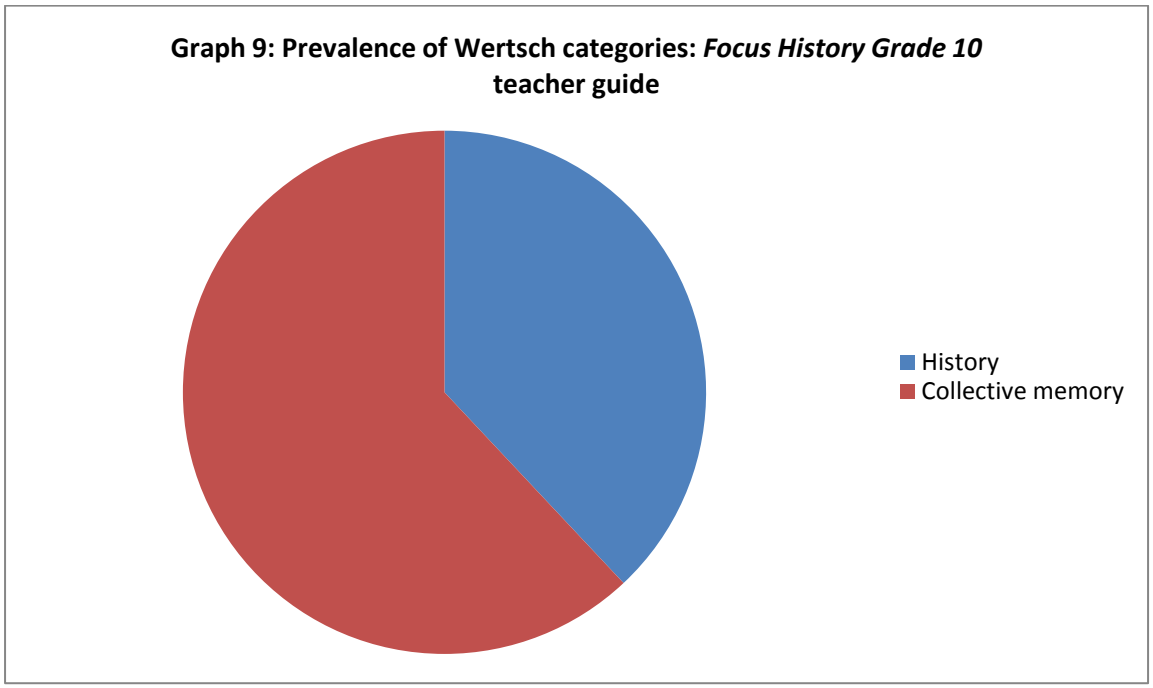
In each case, think about what this aspect was like before the arrival of the Spanish and how it changed…

Answer guideline: EXTRACT… "**The Economy**
Before colonisation: Wealth was held in the hands of the Aztec or Inca leaders, particularly the king or emperor. Indigenous societies were prosperous…They also mined gold and silver. Land was worked by the people and they produced many different kinds of crops. They all contributed to food production.
With colonisation: Wealth was seized by the Spanish. Many riches of the area were sent back to Europe. The cities were destroyed. Land was used for plantation agriculture and the *encomienda* system resulted in people being forced to work. Slaves were imported from Africa…."

My comment: *This extract from the answer guideline shows the Spanish as perpetrator and the Aztecs and Incas as victims of the process of colonisation. The commitment to a single perspective suggests an authorial voice designed to commemorate the suffering of victims of Spanish colonisation. This implies alignment with the political aim of CAPS to uncover past abuses and give a voice to those who were silenced in the past.*

Focus History Grade 10- Wertsch categories

Within the *Focus Grade 10* History teacher-guide chapter, I coded one-hundred and four individual questions in total drawn from twenty-three activities. Graph 9 below presents the prevalence of the two Wertsch categories in the *Focus History Grade 10* teacher guide across all one-hundred and four questions.



I determined that the percentage prevalence of the history category was 38%, and that 62% of the answer guidelines reflected sub-categories of Wertsch's collective memory category. The Wertsch history category is manifested through the demonstration of the complexity of historical processes by recognising ambiguity in explanations of such processes, and through understanding the transformational nature of historical perspective and debate. On occasion, answer guidelines also seek to recognise difference in historical perspective by calling on learners to present their own opinions, as well as through meta-cognition that encourages learners to understand how bias is conveyed.

The collective memory category reveals itself through an intolerance of ambiguity of perspective in the use of generalisations, presenting simplistic answer guidelines to complex questions, in numerous answer guidelines that do not require learners to present justification, and the emphasis on a pre-determined narrative that encourages a commemorative voice. *Presentist* thinking is also encouraged by using history to develop values in the present. What follows are examples that typify my decision-making in the coding process.

The answer guidelines for the Focus chapter teacher's guide were one-dimensional or skeletal in nature, and created a perception of textbook authors that were, in general, not tolerant of ambiguity in interpretation or who lacked an understanding of the complex nature of historical processes. Often task questions asked for learner perspectives, but the answer guidelines did not allow for any kind of variety in opinion.

Examples of History Category- *Focus History Grade 10*

Example 1: Demonstration of the complexity of historical processes.
(Activity 2, p. 41, question 2)

Rank the list of reasons for European exploration in order of what you think were the most important to least important.

Answer guideline: Ranking will differ from learner to learner, but should be explained.

My comment: *The answer guideline is minimal and leaves a lot unsaid, however it does suggest to the teacher that learner opinions on the relative importance of certain reasons for European colonisation will differ. According to the answer guideline, but not the task instruction, learners are required to show how they arrived at their conclusions which implies an acknowledgement that colonisation and the reasons for it are complex and open to debate. This aligns with Wertsch's history category that stresses the ambiguous nature of historical interpretation. It also stresses the principle of understanding and respecting a diversity of opinion, as espoused in the History CAPS.*

Example 2: Recognition of ambiguity in historical perspective.
(Activity 3, p. 43, question 2)

How would you describe the sailors who went on these long ocean journeys? Choose from the following list, and add your own words as well. Use a dictionary to look up the words that you may not understand. Rough, greedy, uncivilised, spirited, gallant, brave, chivalrous, courageous, determined, adventurous, curious, desperate.

Answer guideline: Learners can select from the list. Their answers will vary, but should be explained.

My comment: *Again, the answer guideline is minimal. However it does acknowledge a variety of interpretation that could arise. This corresponds with Wertsch's history category and the ambiguous nature of historical interpretation. The words provided in the list in the question are adjectives that enable the learner to formulate and express both positive and negative opinions about the sailors. This will enable differences in perspectives to arise from the learners. This stresses the principle of understanding and respecting a diversity of opinion, as espoused in the History CAPS, one of the democratic values enshrined in the curriculum document.*

Example 3: Meta-cognition that encourages learners to understand how bias is conveyed (Programme of Assessment, p. 56, question 1.3).

How could you change the title of the book to give another point of view about European expansion and conquest? [Book title: *New Worlds: The Great Voyages of Discovery, 1400-1600*].

Answer guideline: Those who were conquered might give the title of the book a negative slant, something like *Voyages of Violence* or *Voyages of Non-discovery*.

My comment: *Again the answer guideline is brief. However, it does imply that learners are required to think about how bias manifests itself, and to apply this knowledge through a reconstruction of the book title to suggest another point of view about early European voyages of exploration and conquest. This links with Wertsch's history category as it encourages a critical, reflective stance from the learner. An understanding of how bias manifests itself in creating different perspectives would develop critical literacy skills in learners. A critical or reflexive attitude is evident in Wertsch's history category as well being promoted in the History CAPS.*

Examples of Collective Memory Category- *Focus History Grade 10*

Example 1: The use of generalisations.
(Activity 1, p. 39, question 2.2)

Multiple-choice style question where learners are required to pick statements that are incorrect and rewrite them correctly.
Statement 2.2: European exploration and European colonisation mean the same thing.

Answer guideline: European exploration was a peaceful process and European colonisation was a violent process.

My comment: *A simplistic conceptual definition of the natures of exploration and colonisation is provided. Such definitions undermine learner potential to fully understand complexity of historical processes. Such simplistic generalisations also emphasise a pre-determined narrative that appears in the chapter. This could encourage an uncritical, subjective approach to understanding history that aligns with Wertsch's collective memory category.*

Example 2: Presentation of simplistic answer guidelines to complex questions.
(Activity 4, p. 48, question 1.1)

Look at Source F. Is the picture (see below) realistic or exaggerated like a cartoon?



During Columbus's time on the island of Haiti, he and his men hunted the indigenous population for sport, beating, raping, torturing, killing, and then using the bodies for food for their hunting dogs. This picture was drawn by Theodorus De Bry in 1590. De Bry lived in Europe and wrote books based on first-hand stories by

explorers. He never visited the Americas. He created many detailed illustrations for his books. This picture is reproduced in a modern newsletter called the *Indian Times*, which campaigns for the rights of the few Native Americans left today.

Answer guideline: Exaggerated.

My comment: *A one word answer guideline is provided. A key part of the doing history construct is to be able to formulate arguments for one's choices. In the answer guideline no such justification is presented or asked for. No debate is tolerated either in terms of the opinion that is deemed acceptable. This simplistic answer that shows impatience with ambiguity could serve to undermine how learners and teachers understand the construct of doing history. These simplistic answers are common place in the Focus chapter teacher guide. This impatience with ambiguity falls into Wertsch's collective memory category.*

Example 3: Intolerance of ambiguity.
(Activity 2, p.45, question 2.1)

Look at the painting in Source B (see below). How would you describe the way in which Columbus and the Spanish are drawn?



A Spanish painting of Columbus's landing in the 'New World'. Notice the emphasis on the Christian spirit of the Spanish explorers.

Answer guideline: Powerful heroes bringing the Christian message.

My comment: *The simplistic and unambiguous answer guideline provides little scope for*

varied points of view. The picture contains detail that could allow learners to express a variety of opinions on how the Spanish are portrayed. The answer guideline is impatient with ambiguity in its suggestion that there is only one right answer. Also, no substantiation of opinion is required by the answer guideline. This runs counter to the construct of doing school history.

Example 4: *Presentist* thinking that uses history to develop values in the present. (Activity 3, p.47)

The following example comes from the guidelines provided for teachers on how to approach the particular activity questions and possible responses from the learners. It states,
"Give learners the opportunity to express their thoughts and concerns. The principles that underlie our whole education system include social justice, human rights and inclusivity, and learner's responses should be in line with these principles."

My comment: *Here the teacher guide implies what responses are to be considered appropriate from learners. The present day values of our constitution are required to guide learner's opinions about Spanish actions in the past, thereby ignoring generational difference in outlook between people back then and people today. Learners are told to judge past actions based on present day values. This seeks to deny the 'pastness' of events are attitudes from history which places this example into the collective memory category. However, the political aim of CAPS is reflected here in the attempt to inculcate an understanding of social justice, human rights and inclusivity.*

Example 5: Answer guidelines that do not require learners to present justification. (Activity 4, p. 48, question 1.4)

Why was the picture created? Does it try to influence the way you feel about what is depicted?



During Columbus's time on the island of Haiti, he and his men hunted the indigenous population for sport, beating, raping, torturing, killing, and then using the bodies for food for their hunting dogs. This picture was drawn by Theodorus De Bry in 1590. De Bry lived in Europe and wrote books based on first-hand stories by explorers. He never visited the Americas. He created many detailed illustrations for his books. This picture is reproduced in a modern newsletter called the *Indian Times*, which campaigns for the rights of the few Native Americans left today.

Answer guideline: The picture was created to shock those who look at it.

Comment: Examples like this answer guideline abound in the Focus chapter teacher guide. The task focus is on the motive for a source being produced. Motive is complex and a discussion thereof should allow for this complexity to emerge. However, it is implied that there is only one acceptable answer. No attempt is made to justify the answer guideline provided or why other choices are not acceptable. Also, the answer guideline fails to even address the second question within the task. Evidence-based justification is a cornerstone of historical thinking. Here the answer guideline undermines this and suggests an authorial view of learners as uncritical, non-reflective beings.

Example 6: The promotion of a pre-determined narrative.
(Activity 7, p. 53, question 3.1)

Use Sources B and C, as well as the text in this unit to answer the following questions. What short-term effects do you think slavery had on slaves?

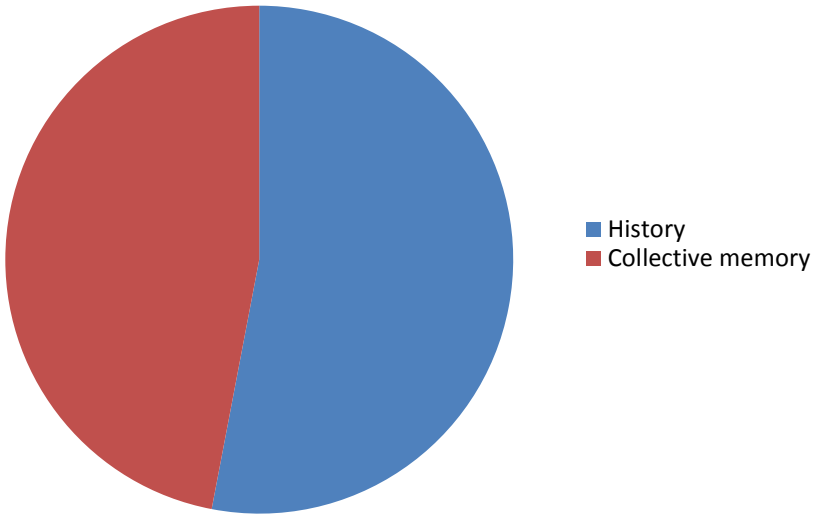
Answer guideline: Slaves became exhausted and had to accept cruel treatment.

My comment: *The simplistic answer guideline uses generalisation and an intolerance of complex nature of slavery to suggest that slaves had no agency or strategy to resist the worst depredations of slavery. Here I do not seek to blame the victim of slavery for their situation-history shows us many examples of slave-uprisings that showed how slaves attempted to use their own power to throw off the bonds that kept them as slaves. Yet in this answer guideline slaves are portrayed as passive victims or recipients of cruel treatment. The commemorative authorial voice suggests a textbook narrative that seeks to create a temple to the suffering of indigenous peoples due to colonisation that could undermine learner understands of complex historical processes, in this case, slavery.*

Viva History Grade 10- Wertsch categories

Within the *Viva Grade 10* History teacher guide chapter, I coded sixty-five individual questions in total drawn from fifteen activities. Graph 10 below presents the prevalence of the two Wertsch categories in the *Viva History Grade 10* teacher guide across the sixty-five individual questions.

Graph 10: Prevalence of broad Wertschian categories: *Viva History Grade 10* teacher guide



Out of the sixty-five individual question answer guidelines contained in the fifteen activities in the *Viva History Grade 10* textbook, I determined that the percentage prevalence of the history category was 53%, and 47% of the answer guidelines reflected Wertsch's collective memory category.

The history category manifests in the *Viva* teacher guide through recognition of complexity in explaining historical processes. Many answer guidelines also suggest recognition of ambiguity of interpretation through the addition of a caveat to the answer guideline that instructs the teacher to accept any 'sensible' learner contributions. The objective (in the Wertsch sense) nature of history is also emphasised in places by the use of non-content specific rubrics to assess certain tasks. Meta-cognition also arises at times in tasks that ask learners to adopt a critical, reflective stance. Various questions also explicitly stress multi-perspectivity.

The collective memory category is present in the answer guidelines through impatience with ambiguity in interpretation, the use of generalisations, the appearance of a pre-determined

narrative, as well as a focus on the importance of indigenous knowledge systems which links to a specific 'political' aim of the History CAPS.

What follows are examples that typify my decision-making in the coding process.

Examples of History Category- *Viva History Grade 10*

Example 1: Recognition of complexity in explaining historical processes.
(Activity 2.1, p. 61, question 2)

Refer to Source B. List six reasons for colonisation identified by this source.

Answer guideline: Any six of the following reasons:
- Overpopulation, economic desire, social unrest, religious persecution, imperialism, desire for adventure, desire for individual wealth.

My comment: *The chosen source and the answer guideline provide an array of reasons to explain why colonisation took place. These reasons suggest factors that not only 'pulled' Europeans towards the Americas, but also 'pushed' Europeans out of Europe on journeys of exploration and conquest. These reasons are 'objective' as they appear distanced from any particular bias or perspective. The recognition of ambiguity falls into Wertsch's history category.*

Example 2: Recognition of ambiguity of perspective through the addition of a caveat to the answer guideline.
(Activity 2.4, p. 74, question 2)

Choose a word or phrase from Source A which best describes the Spanish reaction to the Aztec cities they saw. Explain why you chose this word or phrase?

Answer guideline: "Awe", "impressed", and "respectful"- they had not seen cities in Europe as large, well organised or as rich as this. "Surprised", "astounded"- they had expected to find only inferior people (they thought Europeans were more advanced than anyone else). *Accept any other relevant answer which can be clearly explained.*

My comment: *The addition of the caveat in italics in the answer guideline is used throughout*

the answer guidelines for the chapter. It highlights to teachers that perspective in history is varied and complex. Possibly one can argue that the strategy of employing such caveats with regularity can be seen as a 'cop-out' by the authors so that they do not have to produce answer guidelines that are thorough in nature and that seek to verbalise in depth the possible responses that learners may come up with. But in principle such caveats promote the idea of 'objectivity' and the need to recognise ambiguity in point of view.

Example 3: Stressing the 'objective' nature of history through the use of non-content specific rubrics to assess certain tasks.
(Activity 2.3, p. 66, question 3)

Using Sources A, B, C and D write a paragraph in response to the following statement:
"The Spanish conquest was a story of violence, brutality and greed."

Answer guidelines: The rubric provided assesses a learner's understanding of the question, their ability to use the source detail, their ability to evaluate the validity or reliability of the source material, their ability to select relevant content, and their ability to construct grammatically correct sentences.

My comment: *No attempt is made in the answer guideline to dictate to learners what an appropriate opinion to the statement would be. While the question itself may suggest adherence to a pre-determined narrative, learners are free to engage with the question and the source material in an effort to build their own understanding. The rubric also implies that the sources (which expose Spanish greed and brutality) contain bias that may impact on their reliability. In other words, learners are encouraged not just to accept the sources at face-value. While the sources promote a subjective view of Spanish behaviour, learners are provided with scope in the rubric to display their own 'objectivity' (in Wertsch's sense) in historical thinking.*

Example 4: Meta-cognition that seeks to develop the learner's understanding of the biased nature of history.
(Activity 2.4, p.75, question 6)

Look at Source F. How can you tell that it was written by an Aztec? Quote two words or phrases from the poem to illustrate your answer.

Answer guideline: It is written from an Aztec perspective. It speaks of "our grief", "our city is lost and dead". Any relevant quotation which illustrates the Aztec loss is acceptable.

My comment: *The question asks learners to think about how bias manifests itself in sources through a focus on language usage within the source. Again, the answer guideline contains a caveat that allows space for learners to present answers beyond that suggested in the answer guideline. This type of question promotes a critical and reflective attitude in the learner that places this example within Wertsch's history category.*

Example 5: Questions that stress multi-perspectivity.
(Activity 2.11, p. 97, question 4)

Look carefully at Source D (see below). How useful would this source be in showing the relationship between the Khoikhoi and the Dutch in the Cape?

Source D

This extract is adapted from the journal of Jan van Riebeeck. Volumes II, III, 1656-1662, edited by HB Thom and translated by J Smuts, 1954.

31 October 1657:

The Commander [Jan van Riebeeck] spent the day entertaining the Saldanhars [a Khoikhoi tribe from the interior] and questioning them about various things through the medium of a certain girl, aged 15 or 16 and by us called Eva, who has been in the service of the Commander's wife from the beginning and is now living here permanently and is beginning to speak Dutch well.

21 June 1658:

The freeman Jan Reijnierssen came to complain early in the morning that during the night all his male and female slaves had run away, taking with them 3 or 4 blankets, clothing, rice,

tobacco, etc. The commander then called the interpreter Eva alone into his office and privately asked her whether our blacks were not being sheltered by the Hottentots [Khoikhoi]. She (speaking good Dutch) said these words, namely: "Mijnheer, I ... believe that the Fat Captain of the Kaapmans harbours the slaves." On being asked what the chief would do with the slaves, Eva replied: "He will present them to the Cochoquas to retain their friendship and they in turn will deliver the slaves to the Hancumquas living far from here."

23 September 1658: ….

Answer guideline: It is useful as it gives a Dutch perspective of the relationship. However, it must be borne in mind that this is from a Dutch perspective and would need to be used together with accounts from a Khoikhoi perspective.

My comment: *The answer guideline stresses the need for learners not to base interpretation of events on limited numbers of sources. History is constructed from different perspectives and sources need to be uncovered that are reflective of as many of these perspectives as possible to build as complete a picture as possible, in this case, of relationships between the Khoikhoi and Dutch. The answer guideline encourages learners to remain distanced from any particular perspective.*

Examples of the Collective Memory Category- *Viva History Grade 10*

Example 1: Impatience with ambiguity in interpretation.
(Activity 2.1, p.61, question 4)

Using Source B and your own knowledge, write a paragraph in response to the following statement: "The causes of colonisation were mainly economic."

Answer guideline: Most of the learners would agree with this statement. Here is an example of a paragraph in agreement.
"Source B says 'economic desire' of the people in the home countries was one of the reasons for colonisation. It is clear that one of the reasons for colonisation is that people believed that they could become richer by using the resources of the colonies to their benefit. In addition, it is clear from the source that businesses were sometimes agents of colonisation themselves

and that it was not just government that colonised. Businesses, on the whole, make decisions based on economic factors. However, there were other factors such as 'overpopulation, social unrest and religious persecution' which were not economic factors."

My comment: *The author has undertaken to assert which perspective most learners would agree with. The example paragraph provided mentions, at the end, other factors that could be considered, but no effort is made to expound on those factors. Attention is focused on the economic argument only implying that this is the most acceptable interpretation of the statement in the question. This reflects impatience with multi-perspectivity and therefore reflects Wertsch's collective memory category.*

Example 2: The use of generalisations.
(Activity 2.11, p. 97, question 1)

Study Source A (see below). Comment on the way that the Dutch people and the indigenous people are portrayed. What does this tell you about the European view of indigenous people at the time?



A Dutch painting showing the arrival of Jan van Riebeeck in the Cape.

Answer guideline: The Dutch are portrayed in a way that makes them seem lordly and confident. They are well dressed and seem to be prosperous. The indigenous people are portrayed as being barely clothed, servile and submissive. They seem to be 'bowing down' to the Dutch. This shows that the Europeans at that time viewed themselves as superior and having a right to dominate the world. They had little regard for the value of other cultures.

My comment: *Both in the question and answer guideline, generalisation about European attitudes towards other cultures are evident. The author bases this generalisation on evidence gleaned from one source. Also, one could challenge certain interpretations of the painting made by the textbook author. Khoi are shown seated, but not 'bowing down'. The clothing of the Khoi appears historically accurate and do not necessarily suggest poverty. This reflects simplistic (or factually incorrect) analysis which goes against historical thinking. 'Good' historical thinking would stress the need to form opinions based on a variety of sources that give different perspectives. This subjective mode of thinking places this example in Wertsch's collective memory category.*

Example 3: The appearance of a pre-determined narrative.
(Activity 2.3, p. 66, question 1)

Use the information in Sources B and C to explain why the indigenous population died out so rapidly after the arrival of the Spanish.

Answer guideline: The indigenous population died out so rapidly because of the cruelty and brutal treatment of the Spanish, for example the Spanish had superior weapons with which to suppress the indigenous people (Source B). They massacred the indigenous population (Source C). Pregnant women and children were also killed by the Spanish (Source C). Babies were flung into rivers to drown. Accept an answer which identifies cruelty and superior weapons and gives substantiating answers from both the sources.

My comment: *The learners are required to draw evidence from two sources provided. These two sources are in line with the stated objective of the chapter to show "the suffering of indigenous people because of colonisation" (page 53). This appears to suggest an authorial voice that presents a pre-determined narrative with regards to relations between Spanish and Aztec. This suggests an underlying motive in the writing that appears to create a text that commemorates the suffering of indigenous people under colonisation. Therefore this example falls into Wertsch's collective memory category. Again, we see alignment with the political aim of CAPS to provide a voice for those previously silenced in history.*

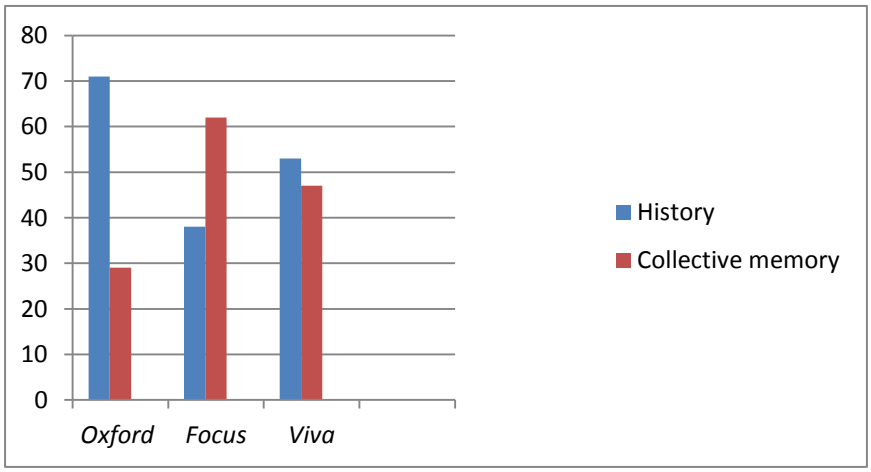
Example 4: The importance of indigenous knowledge systems.
(Activity 2.7, p. 85, question 1)

In groups, create a table using Sources A to C that shows what valuable Indigenous Knowledge the Aztecs had with regards to the following fields: health, agriculture, science and technology. After completing the table, what conclusions can you draw about the need to preserve IKS? Answer guideline: Answer guideline presents a completed exemplar table that provides examples of Aztec indigenous knowledge. *No suggested conclusions about the need to preserve IKS are provided in the answer guideline. Perhaps this is an oversight.* ***My comment:*** *A focus on IKS links to the political project inherent in the History CAPS and shows how school history in South Africa is used to enlighten learners in the present about the importance of IKS. This could also represent presentist tendencies in the writing that seeks to link the past with the present.*

Discussion

Graph 11 below is included to provide a comparative overview of the prevalence of the broad Wertsch categories of history and collective memory across all three textbook chapter answer guidelines.

Graph 11: A comparison of the prevalence (in percentages) of broad Wertsch categories across all three textbook chapter answer guidelines



It shows that the *Oxford* and *Viva* answer guidelines had greater prevalence of Wertsch's history category than the *Focus* answer guidelines. Also, the quality of the answer guidelines for the *Focus* textbook differed from that of the *Oxford* and *Viva* textbooks. In this respect many of the *Focus* answer guidelines were skeletal and prescriptive in nature, and did not require substantiation for proposed answers. In the *Oxford* and *Viva* guidelines more effort was made to provide answer guidelines that demonstrated development of thought through the expression of opinion and the provision of substantiation; as opposed to the frustratingly one-dimensional answer guidelines, intolerant of ambiguity provided, in the *Focus* chapter teacher guide. Often task questions in the *Oxford* and *Viva* textbooks asked for learner perspectives, and the answer guidelines expressly instructed teachers to take into account varying learner opinions. This was lacking in the *Focus* answer guidelines.

4.5 Conclusion

In this chapter I have sought to provide a general overview of the three textbook chapters under investigation. The aim was to give the reader a sense of the number and quality of opportunities that assessment tasks afforded to learners to engage with the content of the chapters, both in an academic and political sense. I then presented data and highlighted key findings related to the academic dimension of the *doing school history* construct that have arisen.

The academic dimension incorporates the cognitive levels and knowledge dimensions in the assessment tasks. I sought to outline the academic project as defined by the Grade 10 History CAPS. Then I presented and discussed data on cognitive level frequency and conceptual knowledge frequency. Across the assessment tasks in the three chapters similarities were evident in the spread of cognitive levels. All three textbook chapters show a cognitive rigour above that suggested by the History CAPS. And regarding knowledge dimension, activity headings in all three chapters focus greatly on conceptual knowledge rather than factual or procedural knowledge.

I then shifted my focus to presenting data on the political dimension of the *doing school history* construct. Here I initially outlined the demands of the History CAPS with regards to the political dimension. Then I presented what the data from the chapters showed regarding political positioning as determined by the Wertsch categories. I finished this chapter with a broad comparative overview and brief discussion of the Wertsch categories found in the three textbook answer guidelines. The data shows that the *Oxford* and *Viva* answer guidelines had

greater prevalence of Wertsch's history category than the *Focus* answer guidelines. Also, the quality of the answer guidelines for the *Focus* textbook was lacking compared to that of the *Oxford* and *Viva* textbooks.

The findings on the academic dimension focused on activity questions in the textbook chapters. However, task questions are only one side of the coin. Many task questions in all three chapters appear to promote historical thinking, but is this borne out in the answer guidelines that appear in the teacher guides? Is the development of historical skills facilitated or hindered by these answer guidelines? I suggest that historical thinking inherent in the activity questions may well be offset by the way in which answer guidelines are constructed. I also emphasise that we should not necessarily equate the prevalence of Wertsch's collective memory category with 'bad' school history, as the History CAPS clearly espouses how the past should be put to use in the present.

In the final chapter I discuss the significance of the findings presented in relation to that which emerges in the literature review. Here I hope to reveal the extent to which the chapters under review portray the construct of *doing school history* as it is proposed in the Grade 10 History CAPS.

5. DISCUSSION AND CONCLUSION

THE SIGNIFICANCE OF THE FINDINGS

5.1 Introduction

This chapter seeks to draw out and discuss the significance of key findings that have emerged from the data. Key findings related to the academic dimension will be discussed first. Findings from the academic dimension focus on issues related to the emphasis on certain cognitive levels in the data, and discrepancies between spread of cognitive levels found in the data and the spread suggested in the History CAPS. The cognitive levels for assessment in history are practised through an engagement with specific skills of the discipline. Therefore, what follows is a discussion of the extent of the balance between unique historical skills for assessment, and those deemed to be more 'generic' academic skills in the literature, History CAPS and the chapter assessment tasks under review. The Revised Bloom's Taxonomy (Anderson, 2005) partners cognitive levels with knowledge dimensions, therefore important findings in the data related to conceptual knowledge focus are also discussed.

Key findings related to the political dimension are discussed second. The focus here is on the presence of an 'official' and 'unofficial' political project evident in the data, and whether these projects undermine the curriculum's commitment to multi-perspectivity as an important historical skill and also as a vehicle to develop democratic values.

Key to this research has been to clearly understand the construct of *doing school history*, how it is portrayed in the CAPS, and whether and how the construct has been recontextualised in the chapter assessment tasks. I substantiate this statement by referring to Wiliam's (2010) central argument that because the understanding of a discipline-construct is at the core of assessment validity, any assessment (and curriculum) design has to begin with a clear definition of the discipline-specific construct to be assessed. Only then will assessments be designed in a way that yields valid evidence about a learner's ability to operate competently within the discipline-construct. Construct definition therefore, must come before the design of appropriate assessments (Ibid. p.259). The determination of, '*what doing history means at the level of the textbook assessment task',* has rested upon ascertaining exactly what construct of school history is evident in the CAPS and then determining whether there is construct validity in the assessment tasks found in the textbook chapters under investigation. The History CAPS contains both an academic and a political project. Textbook assessment

tasks have to demonstrate competency in predominantly assessing the *doing history* construct, while also acknowledging a place for the *knowing history* construct (i.e. fulfilling the academic project of the curriculum), as well as fulfilling the political project (citizenship education) of the construct of school history.

What then are the key findings that emerge from the data, and what is the significance of these findings in connection to the research question?

5.2 The significance of the key findings

5.2.1 The academic dimension

Finding 1: A key finding to emerge from the data was that the cognitive demand of the textbook assessment tasks in all three textbooks exceeded that suggested by the Grade 10 History CAPS. There was certainly a greater emphasis on Level 3 skills (to analyse, evaluate and create) above and beyond that suggested by the curriculum. Also, the skills focus in the lower-order cognitive skills was on Level 2 (to comprehend), rather than Level 1(to remember or extract). Within the *doing school history* construct, this suggests that the textbooks allow for wider opportunities to *do* what it is that historians do, without neglecting the need for learners to also *know* history (Bertram, 2008). I argue that this is advantageous for learners in that their ability to think and operate in historical ways is stretched. However, the danger is that history may become inaccessible to certain learners, particularly those with limited capability in English or who have other learning challenges. Here I refer back to the issue of 'considerate' as opposed to 'inconsiderate texts' discussed in section 2.5.2 of the literature review (Paxton, 1999).

According to Paxton, citing research from McNamara and Kintsch (1996), he suggest that certainly for learners with higher levels of background knowledge, texts that are more 'difficult' ('inconsiderate texts') tend to benefit these learners as they are forced to make their own inferences, to fill in gaps, and make links between the text and their own knowledge (Ibid. p.327). In my research I dealt specifically with assessment tasks and not necessarily the text as a whole in the chapters. Also, my preoccupation with the field of recontextualisation and not the field of reproduction means that I have not had the opportunity to test McNamara and Kintsch's assertion in the South African history classroom. But, possibly the danger exists that within the South African context, where most learners are not first-language English speakers or may lack a broad general knowledge that middle-class children in developed countries may have, such 'inconsiderate texts' and 'inconsiderate assessment

tasks', or assessment tasks that operate at a higher skills level than that suggested in the History CAPS, could be obstacles to greater historical understanding. However, a counter-argument to this is that the notion of 'considerate texts' (and 'considerate assessment tasks') does not necessarily mean providing or assessing lesser or only simpler knowledge and skills; it could also mean providing or assessing complex knowledge and skills in an accessible manner, after providing scaffolding opportunities to learners before they progress towards tasks or questions that test higher cognitive levels. This then points to an area for further research as an extension to my study.

Finding 2: A second point of interest to emerge regarding the academic dimension was whether, what can be termed, unique historical skills were dominant in the assessment tasks over the more 'generic' academic skills.

As discussed in section 2.4 of my literature review, Osborne (2004) identifies unique historical skills that are foregrounded in the *doing history* approach. But, he also stresses that there are some 'generic' skills that history shares with other subjects, such as research and communication skills to mention a couple (Ibid. p. 5). These unique skills can be found on pages 16 and 17 of this report.

Osborne's (2004) unique skills are echoed by Barton and Levstick (2003) when they emphasise how important it is for learners to understand how history is constructed. This occurs through historical investigations that stress both primary and secondary source analysis, understanding relationships between historical evidence and constructed historical accounts, through an understanding of multiple perspectives that are often divergent in nature, and also through an appreciation of how people in the past held differing outlooks on events than we have today (Barton and Levstick, 2003). Barton and Levstick (2003) and Seixas (1999) also highlight another skill they consider to be unique to history, namely: the ability to formulate open-ended questions. The Grade 10 History CAPS also highlights the additional skill of creating an original, coherent and balanced piece of historical writing; however competency in this skill is not, it seems, required to be demonstrated for assessment purposes, according to the History CAPS.

Although the cognitive level spread in the textbook assessment tasks suggested more academic vigour than that proposed by the History CAPS, there was still a greater emphasis overall on levels 1 and 2 skills (over 60% of activity tasks) as opposed to activity tasks assessing Level 3 skills. Could it then be argued that all three textbook chapters actually

undermine the practice of school history through their predominant focus on Level 1 and Level 2 skills, as these could be considered more 'generic', or skills that are practiced in other school subjects? I suggest that such a judgement is too harsh. One has to account for the differing academic abilities of learners by providing 'easier' questions to scaffold the development of their historical skills. These skill levels do, after all, represent a hierarchy. An overwhelming focus on Level 3 skills and the skill of creation would put school history out of reach of many learners. Certainly in my experience as a history teacher in a South African school where English second and third language learners predominate, I find that they battle in their ability to grasp the requirements to competently answer level three questions. Their English language challenges even make certain level 2 questions a challenge. I assume that these difficulties are replicated across other South African schools where the demographic make-up of the school is similar to my own. I do not argue that textbook assessment tasks that focus a lot on Level 3 skills are a waste of time within the South African context, however even if they supersede the suggested History CAPS skills level spread, they should not neglect the important scaffolding role played by the more 'generic' Levels 1 and 2 skills.

Finding 3: But, what about the skills of asking open-ended questions and creating original, coherent pieces of historical knowledge, highlighted as vital historical skills by key *doing history* theorists? As stated, neither of these skills is suggested as key skills for assessment in the History CAPS for grade 10, 11 and 12. However, instances where they were tested were evident in particularly the *Oxford* textbook chapter assessment tasks under investigation.

For examples, see Chapter 4, page 53

- *Asking open-ended questions*: Activity 2, p.51 of *Oxford History Grade 10*.
- *Creating original, coherent pieces of historical knowledge*: Extended writing task, p.63 of *Oxford History Grade 10*.

Paxton (1999) states that learners are often constrained in their understanding of a discipline by the parameters of assignments or assessment tasks. Therefore one can argue that the skills for assessment presented in curricula and tested in assignments could have a powerful effect on the way teachers (and by extension, learners) understand a discipline and what it entails. If the History CAPS' specification of cognitive levels for assessments does not foreground the need for teachers to enable learners to ask open-ended questions, then both teachers and

learners may come to the conclusion that this skill is not required in the *doing school history* construct. This could create, in teachers and learners, a limited understanding of the nature of history as a discipline of enquiry. The same goes for the ability to create original, coherent pieces of historical knowledge. In this respect, those few (approximately 3% across all three textbooks chapters) textbook assessment tasks that do encourage the asking of open-ended questions or the creation of historical knowledge play a vital role in repairing possible flaws in the construct of history portrayed in the History CAPS.

An answer to the question; 'why are these key unique skills not required to be assessed according to the History CAPS?' could present opportunities for additional research. Possibly the agents in the Official Recontextualising Field consider these skills to be beyond the ability of the South African learner, or they consider these skills to be confined to the agents in the field of production, or maybe a more sinister political agenda is present that seeks to suppress the ability or inclination of learners to ask questions and communicate original thoughts.

Finding 4: An additional important finding associated with the academic dimension was the identification of four specific conceptual knowledge foci common across all three textbook chapters. This focus was on concepts of multi-perspectivity, bias, reliability of historical sources, and effect or consequence within the assessment tasks in the investigated chapter of the three textbooks. The reason for a focus on these concepts, I argue, is that the choice of conceptual knowledge focus is determined by the content focus of the chapters, in this case *European expansion and conquest in the 15th to 18th centuries*. Issues of societal change and the impact (effect) of colonial expansion are in keen focus in these chapters. It is a good content area for teaching how historical processes like colonisation impact on or change societies touched by it. At the same time, an emphasis on impact or consequence fits well into a historical narrative that seeks to foreground a pre-determined anti-colonial narrative.

A focus on the concept of multi-perspectivity is also prevalent. While this superficially speaks to the construct of *doing school history*, a closer evaluation of the authenticity of this commitment to multiple perspectives can only be viewed in relation to what is uncovered in the political dimension when we investigate the historical narrative present in the chapters, as well as the commitment of the answer guidelines in the teacher guides to presenting different arguments and perspectives on causes or effect.

5.2.2 The political dimension

Finding 1: A study of the extent to which South African history textbooks create opportunities for learners to *do history* needs to take into account the added dimension of citizenship education as a key purpose of history in South African schools.

As stated in chapter 2, section 2.5, history is often seen as a separate discipline to social studies or civics or citizenship (Thornton and Barton, 2010). But, an observation I make as a South African history educator is that particularly in our Further Education and Training (FET) phase there is less 'choice' regarding branches of social studies that learners may wish to pursue. As such, school history in South Africa frequently blends the discipline of history with other subjects like civics or government studies. Therefore the subject of history in South African schools is a key vehicle for the teaching and learning of 'good citizenship' values. As such history is used in various ways to promote a political agenda.

Finding 2: It was important to clearly understand how the political project is espoused in the History CAPS, and how it was reflected in the textbooks. What became clear in the data was the existence of an 'official' political project and an 'unofficial' political project.

The *official* political project (that which is explicitly defined in CAPS) appeared to manifest itself in the data through the:

- Construction of questions and answer guidelines that explicitly use the past to develop an understanding of the present.

- Use of empathy questions to develop learner sensitivity to issues of diversity of perspective, and by extension, to promote the democratic value of tolerance of differing competing viewpoints.

- Presence of activities/ questions that highlight the role of diverse groups in society; as well as the selection of sources that promotes an understanding of the diversity of role-players in historical events. Again, this seeks to promote the democratic value of tolerance.

- Presence of activities/ questions that promote democratic values in general.

- Use of answer guidelines that stress multi-perspectivity; and a tolerance of competing viewpoints

The *unofficial* political project (one not explicitly evident in CAPS, but evident in the data) appeared to manifest itself through the:

- *Imposition of a pre-determined historical narrative* in all three chapters under review that promotes a simplistic interpretation of history. This narrative was presented in a variety of ways; such as through source selection, empathy exercises, the phrasing of questions and answer guidelines in ways that promote generalisations and therefore explicit bias, the use of emotionally-loaded words in questions, answer guidelines, and sources, as well through the chapter introductions in the textbooks or teacher guides.

- *Prevalence of one-dimensional or unambiguous answer guidelines* that express one 'acceptable' point of view or do not require learners to justify opinions or perspectives. While all three chapters under investigation appeared to commit to the concept of multi-perspectivity in the way they asked questions in assessment tasks, often this commitment was not supported in the answer guidelines. Textbook writers themselves appear unable to answer the questions in a multi-perspective fashion. The *Oxford* and *Viva* teacher guides succeed to an extent in addressing multi-perspectivity in their teacher guides. The *Focus* textbook writers appear unable to answer questions in a multi-perspective fashion. Therefore, the authenticity of the *Focus* textbook's commitment to multi-perspectivity needs to be questioned. If learners are only allowed to work within the pre-determined historical narrative dictated by the textbook, is there not just a mimicking of unique historical skills like understanding multi-perspectivity? Surely a commitment to 'real' multi-perspectivity would entail an investigation and understanding of multiple historiographies (not really evident in the chapters), of which there are many. For example, the idea that not all Europeans were bad or ruthless, like some missionaries who sought to protect remaining indigenous populations, or the idea that indigenous peoples were not always passive victims of European aggression, and that there were positive aspects for colonisation to the colonised territories and peoples, like the building of schools and hospitals. A reconciliatory narrative could also be presented that expresses similarities between people of different places or cultures.

Finding 3: Debating across historiographies, rather than within a single imposed one, would be a more authentic commitment to multi-perspectivity and developing learner respect for diversity of opinion, which are cornerstones of democracy or citizenship education. The idea of mimicking critical thinking echoes findings by Morgan and Henning (2011) where they discovered that Grade 11 NCS History Textbooks began with a stated position of seeing

learners as active participants in knowledge construction, but the delivery of the content in the textbooks did not support this position (Morgan and Henning, 2011, p.182). They pointed out specific examples of the mimicking of critical thinking such as tasks that only allowed learners to operate within a single, distant perspective, as well as answer guidelines that impose a 'right' answer on learners. Learners were not allowed to entertain a different line of thinking, and so critical thinking became a "mere pretence" (Ibid. p.182). It appears that the problem of mimicking critical thinking has also crept into history textbooks under the CAPS dispensation.

In the chapters under analysis, the dominant pre-determined narrative was anti-colonial in nature. While the Grade 10 History CAPS contained no explicit determination of such a narrative, it could be implicitly determined through the need for social transformation for the purpose of correcting educational imbalances, as well as inequalities or injustices of the past (CAPS, 2011, p. 4). Embedded in this need for the correcting of educational imbalances could be the need to correct certain historical-ideological imbalances that have been carried through from the pre-1994 era.

It is important to refer back to Wertsch's (2002) table of history and collective memory as the tool for analysis of the political dimension. It is clear that Wertsch's (2002) collective memory category aligns strongly with the political project inherent in curriculum documents and school textbooks. I do not seek to make a value judgement on whether we equate the collective memory category with bad history education and the history category with good history education. What we do need to bear in mind is that *doing school history* requires learners to engage in aspects highlighted in the collective memory category, such as creating links between past and present for certain uses. This is ultimately part of the construct of history portrayed in CAPS. As the History CAPS explains, history education must:

> "Section 1.3
>
> a) Focus on knowledge, skills and values worth learning and that are meaningful in the lives of the learners.
>
> b) Enable learners to meaningfully participate in a democratic society." (p.4)

Yet, Wertsch's (2002) table does imply a need to decide whether history textbooks are forums for debate or temples of commemoration. Or can (or should) they be both? In the chapters under investigation, the domination of a particular anti-colonial narrative suggest

that these textbooks veer towards being temples for the commemoration of the suffering of indigenous peoples at the hands of colonialists. Opportunities for debate are evident, but only within the confines of a narrative deemed worthy of commemoration by agents within the field of recontextualisation.

The post-modernists in the field of production remind us that history is "subservient to various power interests" (Jenkins, 1999, p.2). Agents within the fields of production and recontextualisation are influenced by those in power. It is those in power that determine what should be deemed significant in history. Paying lip-service to the understanding of and grappling with multi-perspectivity, through the imposition of a pre-determined narrative, undermines the political and academic projects of the *doing school history* construct.

5.3 Conclusion

5.3.1 Key insights

This chapter has sought to draw out and expand on the significance of findings that have emerged from the data. Important findings related to the academic dimension were discussed first. Issues in focus here were related to the emphasis on certain cognitive levels in the data, and cognitive level spread discrepancies between that found in the data and that suggested in the History CAPS. Linked to this was an analysis of the extent of the balance between unique historical skills for assessment, and those deemed to be more 'generic' academic skills in the literature, History CAPS and the chapter assessment tasks under review. Findings related to conceptual knowledge focus in the data were also examined.

Findings related to the political dimension were discussed second. The focus here was on the presence of an 'official' and 'unofficial' political project evident in the data, and whether these projects undermined the curriculum's commitment to multi-perspectivity as an important historical skill and also as a vehicle to develop democratic values.

To summarise, I determined that within the academic dimension there was a discrepancy in cognitive level spread between the textbook assessment tasks and that suggested in the History CAPS. The textbooks allowed for more stringent opportunities to *do* history with a focus on unique historical skills, as opposed to more 'generic' academic skills. However, this was undermined by certain unique historical skills being ignored for assessment by the History CAPS. There was much emphasis in the data on the concepts of multi-perspectivity and consequence in terms of conceptual knowledge focus in the chapters under review. This I

argued was determined by the content focus of the chapters. However, I went on to question the textbooks' and teacher guides' commitment to multi-perspectivity in relation to findings regarding the political dimension. In respect of the academic dimension of the *doing school history* construct, I argue that there was a high level of construct validity. Generally the cognitive level alignment between the *doing history* paradigm, the requirements of the history CAPS, and that found in the textbook assessment tasks was strong, but less so in terms of conceptual knowledge.

With regards to the political dimension I found evidence of an 'official' and 'unofficial' political project within the data. Particularly in relation to the *unofficial* political project, and the imposition of a pre-determined narrative, I argued that its presence could undermine the development of key historical skills, like understanding multi-perspectivity, as well as undermining the development of certain democratic values. As such the history textbook chapters (particularly the *Focus* textbook) under investigation were in danger of becoming temples of commemoration, rather than forums for debate. The presence of a generally strong unofficial political project not explicit in the history CAPS suggests a debatable level of construct validity concerning the alignment of the political between the history CAPS and the textbook chapters and teacher guides under review.

5.3.2 Limitations

I acknowledge that I have conducted a study that has worked with a small data set (only assessment tasks within a specific content area of three Grade 10 textbooks). As such, the generalizability of my study is limited. Findings related to the chapters under review cannot necessarily be transposed onto the other chapters within the textbooks or onto textbooks not incorporated into my study. The focus of the study was also very much on the first two fields of Bernstein's pedagogic device; the fields of production and recontextualisation. I suggest that another area for further research could be to determine the impact of my findings on the teaching and learning of history within the field of reproduction; in other words, how do these textbooks actually impact on what happens within the classroom? Also, an investigation of continued tensions between the different fields of the pedagogic device will help to further clarify how and what knowledge is or should be recontextualised for learning and teaching within the classroom.

5.3.3 Recommendations

Bernstein (1996 and 2002) warns of the development of a false historical gaze. As agents in the field of reproduction, history educators must arm themselves with a clear understanding of the construct of *doing school history.* If we travel downstream to the field of reproduction in Bernstein's pedagogic device, final delivery of historical content and skills rests with the educator. Particularly for inexperienced history educators who work closely with the current History CAPS, textbooks and accompanying teacher guides, the development of a distorted view of what it means to do school history becomes a danger. Few history educators have the privilege, like I have had, of critically reflecting on what is that they are required to do, what is that they do do, and what changes are necessary in what they do. The way History CAPS recontextualises the construct of *doing school history*, as well as the way assessment tasks are presented in textbooks have a powerful effect on the way teachers and learners understand the discipline of history and what it entails. I know that my journey in this study has developed my awareness of issues fundamental to curriculum and assessment in history. My duty then is to transmit a deep and critical understanding of the discipline of history to my learners, through the transmission of a variety of skills and knowledge that frame the notion of *doing school history*, incorporating the notion of knowing history, as well as a genuine understanding of multi-perspectivity that engages with and across given narratives.

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