

**Curriculum recontextualisation: a case study of the
South African high school History curriculum**

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Abstract

This thesis aims to answer the question: How is history knowledge contextualised into pedagogic communication? Empirically, it takes place at a specific point in the curriculum change process in South Africa, namely the period when the new curriculum for the Further Education and Training (FET) band was implemented in Grade 10 classrooms in 2006.

The study is theoretically informed by a sociological lens and is specifically informed by the theories of Basil Bernstein, particularly his concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal knowledge structures. It is premised on the assumption that the official policy message changes and recontextualises as it moves across the levels of the pedagogic device. It tracks the recontextualisation of the history curriculum from the writers of the curriculum document to the actual document itself, to the training of teachers and the writing of textbooks and finally to three Grade 10 classrooms where the curriculum was implemented in 2006.

The empirical work takes the form of a case study of the FET history curriculum. Data were collected from a range of different participants at different levels of the pedagogic device. It was not possible to interrogate all the sets of data with the same level of detail. As one moves up and down the pedagogic device, certain things come into focus, while other things move out of focus. Data were collected through interviews with the writers of the history curriculum, with publishers and writers of selected Grade 10 history textbooks and through participant observation of a workshop held by the provincial education department to induct teachers in the requirements of the new FET history curriculum. Data were collected in the Grade 10 history classrooms of three secondary schools in 2005 and 2006. The school fieldwork comprised video recording five consecutive lessons (ten lessons over two years) in each of the three Grade 10 classrooms, interviewing the history teachers and selected learners, collecting the test papers and assignment tasks and assessment portfolios from selected learners.

The study uses the pedagogic device as both a theoretical tool, and a literary device for the organization of the thesis. Within the field of production, the study examines what is the discipline of history from the perspective of historians and of the sociologists of knowledge. History is a horizontal knowledge structure that finds its specialisation in its procedures. However, an historical gaze demands both a substantive knowledge base and the specialised procedures of the discipline.

Within the Official Recontextualising Field, the study examines the history curriculum document and the writing of this document. The NCS presents knowledge in a more integrated way. The knowledge is structured using key historical themes such as power alignments, human rights, issues of civil society and globalisation. There is a move away from a Eurocentric position to a focus on Africa in the world. Pedagogically, the focus is on learning *doing* history, through engaging with sources.

Within the Pedagogic Recontextualising Field, the major focus of the teacher training workshop was on working with the outcomes and assessment standards within the 'history-as-enquiry' framework. Textbook writers and publishers work closely with the DoE Guidelines and focus on covering the correct content and the learning outcomes and assessment standards. The three teachers within the field of reproduction taught and interpreted the curriculum in different ways, but the nature of the testing (focused primarily on sources) was similar as there are strong DoE guidelines in this regard.

For Bernstein, evaluation condenses the meaning of the whole pedagogic device. This is even more so when the curriculum is outcomes-based. The assessment tasks that Grade 10 learners in this study were required to do had the appearance of being source-based, but they seldom required learners to think like historians, nor did they require them to have a substantial and a coherent knowledge base. The FET history curriculum is in danger of losing its substantive knowledge dimension as the procedural dimension, buoyed up by the overwhelming logic of outcomes-based education and the strongly externally framed Departmental assessment regulations, becomes paramount.

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Jean, Derek, Sharon and Bear were always encouraging. My parents have supported me always. John has always been there for me, and for that I am very grateful.

To Jonathan and Dylan – may you continue to be fascinated by the world and always love to learn.

Declaration

I, Carol Anne Bertram, declare that

- (i) The research reported in this thesis, except where otherwise indicated, is my original research.
- (ii) This thesis has not been submitted for any degree or examination at any other university.
- (iii) This thesis does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons.
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Signed:

Carol Anne Bertram
July 2008

The most important thing about research is to know when to stop. How does one recognise that moment? When I was eighteen, my mother told me that when out with a young man I should always leave a half –hour before I wanted to. Although I was not sure how this might be accomplished, I recognised the advice as sound, and exactly the same rule applies to research. One must stop before one has finished; otherwise one will never stop and never finish.

Barbara Tuchman, 1981, p. 20

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Abbreviations

AS	Assessment Standard
C	Classification
C2005	Curriculum 2005
COSATU	Congress of South African Trade Unions
DET	Department of Education and Training
DoE	Department of Education
F	Framing
FET	Further Education and Training (Gr 10 –12)
GET	General Education and Training (Gr R –9)
HoA	House of Assembly
HoD	House of Delegates
HoR	House of Representatives
ICS	Interim Core Syllabus
ID	Instructional discourse
LA	Learning Area
LO	Learning Outcomes
KZN	KwaZulu-Natal
LAC	Learning Area Committee
LPG	Learning Programme Guidelines
NCS	National Curriculum Statements
NETF	National Education and Training Forum
OBE	Outcomes-based education
ORF	Official Recontextualising Field
PRF	Pedagogic Recontextualising Field
RD	Regulative discourse
RNCS	Revised National Curriculum Statements
SAG	Subject Assessment Guidelines
SAHP	South African History Project

Chapter 1

Introduction to the study

1.1 Introduction

This chapter locates the study in its theoretical and empirical fields and describes the rationale for this study and the research questions. In order to locate the study empirically, the chapter describes the process of curriculum change in South Africa since 1994, when the new democratically elected government took power. The process of local curriculum reform is located within the literature on education reform and policy studies. Empirically, the study is located within a specific case of curriculum change, that of the history curriculum in the secondary school. Concepts pertaining to the nature of history as a discipline and the development of history teaching and learning, are covered in Chapter 4 and 5. Theoretically, the study is broadly located within the field of the sociology of education and more specifically within the theory of Basil Bernstein. The theoretical issues are described more fully in Chapter 3. Lastly this chapter outlines the structure of the thesis.

1.2 Theoretical and empirical fields of the study

Any research study is located within both a theoretical and an empirical field. According to Brown and Dowling (1998), the theoretical field of a study is the broad area of academic and/or professional knowledge, research and debates which contains a researcher's general area of interest. This framework will comprise the researcher's theoretical propositions or hypotheses or research questions and, ultimately, her conclusions. The empirical field is the general area of practice or activity or experience about which the researcher intends to make claims.

Translating these two concepts to this study, the theoretical field of this study is the sociology of education and the empirical field is curriculum reform in South African high schools. This study is theoretically informed by a sociological lens which gives

us some explanation for how educational advantage and disadvantage arises, how it is reproduced and how it might be overcome (Ensor & Galant, 2005; Moore, 2004). More specifically it is informed by the theories of Basil Bernstein with a particular focus on the theoretical resources provided by his concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal knowledge structures. Bernstein provides a useful language of description to analyse the form of pedagogic communication, but does not focus on the quality of the message that is relayed. So I also draw on other analytic tools, particularly Bloom's Revised Taxonomy in order to analyse levels of cognitive demand in assessment tasks and questioning. Other knowledge and debates which make up the theoretical field of the study are around the nature of the discipline of history in schools, the history curriculum in South Africa, and general curriculum reforms in South Africa over the last decade.

The empirical field of the study is school curriculum reform. The study takes place at a specific point in the curriculum change process in South Africa, namely at the time when the National Curriculum Statements for the Further Education and Training band (grades 10 -12) were implemented in Grade 10 classrooms. Data were collected in schools in 2005 and 2006. The background history and context of the general school curriculum reform process since 1994 will be described in more detail later in this chapter. The particular history and context of history curriculum development will be described in Chapter 5. The study tracks the recontextualisation of the history curriculum from the writers of the curriculum document, to the actual document itself, to the training of teachers and finally to three Grade 10 classrooms in which the curriculum was finally put into practice.

1.3 Research questions

The overall research question informing the study is:

How is history knowledge recontextualised into pedagogic communication?

The three sub-questions for the study are:

1. What are the assumptions about knowledge, pedagogy and assessment that underpin the National Curriculum Statements (grades 10 -12) for history?

2. How is the new curriculum interpreted by textbook writers and in teacher training workshops?
3. How do teachers understand and implement the history NCS in their classrooms?

The methodological question is: How does the concept of Bernstein's pedagogic device assist in describing the recontextualising of the history curriculum?

The empirical work for the study took place in 2005 and 2006. The National Curriculum Statement (NCS) for Grades 10 -12 was implemented in Grade 10 classrooms in 2006. Fieldwork took place in three secondary schools in the province of KwaZulu-Natal in South Africa.

1.3.1 Rationale for the study

There have been a number of studies in South Africa which focus on the implementation of the new curriculum (Blignaut, 2005; Education 2000 Plus, 2002; Jansen, 1999c; Potenza & Monyokolo, 1999; Reeves, 1999; Siebörger & Nakabugo, 2001; Stoffels, 2004). Many of these have focused on the extent that teachers have succeeded or failed to implement the new curriculum. The focus of this study is on the recontextualising of the curriculum message as it moves from the curriculum writers, to the written curriculum document, to the teacher training, to text book writers and finally to teachers in history classrooms. The study assumes that the 'roll-out' of a curriculum message is not a smooth passage and that teachers will not easily and seamlessly adopt all the requirements of the official policy. It is interested in the ways in which the official policy message is re-interpreted and recontextualised at various points of the implementation process. It is concerned with what Ball (1993) names policy trajectory studies, which 'employ a cross-sectional rather than a single level analysis by tracing policy formulation, struggle and response from within the state itself through to the various recipients of policy' (p. 51).

The study uses a particular sociological theory (Bernstein's pedagogic device) to tell the story of curriculum recontextualisation in the subject of history. Bernstein

provides a specific internal and external language of description that is used to analyse both the curriculum documents and the classroom data.

1.4 The empirical field: Curriculum change in South Africa since 1994

1.4.1 The need for education reform

Education in South Africa has always reflected an ideology of the superiority of white people (by both colonial and apartheid governments) which had been characterised by the inequality of resources allocated to different ‘races’. It had also been a key site of the struggle against apartheid in the 1970s and 1980s. It was thus imperative for the new democratically-elected government of South Africa to show change within the key arena of education. Harley and Wedekind describe the imperative like this: ‘if the curriculum had been used to divide races... and to prepare different groups for dominant and subordinate positions in social, political and economic life, its new mission would be that of uniting all citizens as equals in a democratic and prosperous South Africa’ (2004, p. 195).

In the first half of the twentieth century, black people were mostly educated in mission schools. A key piece of legislation was the Bantu Education Act of 1953 which closed down these mission schools and set up separate departments of education for different race groups. These departments of education were unequally funded and followed different curricula. One of the major challenges of the democratically-elected government in 1994 was to bring about equality of resources and curricula. Nineteen education departments were merged into one national department in 1995 and there was a first ‘wave’ of curriculum cleansing which was aimed at removing the most blatantly racist content from curricula.

1.4.2 An outcomes based system

1990 was a key political moment in South Africa, which saw the unbanning of political organisations and the release of Nelson Mandela. It was also the time when a range of ‘competing social movements and political actors began to stake their

curriculum positions' (Jansen, 1999b). Amongst the range of participants were the National Education Policy Investigation, the Private Sector Education Council (PRISEC), various NGOs, the labour movement as well as the apartheid state. Jansen (1999b) argues that the most influential and significant policy document of the time was the National Training Strategy Initiative (NTSI). This provided a foundation for curriculum and assessment thinking within South Africa and had the backing of COSATU (the Congress of South African Trade Unions). Its proposals for an integrated approach to education and training bound education, including schools, into this framework.

Thus it was the training sector that was initially most active around curriculum reform, with strong proposals for an integrated approach to education and training and an argument for a single qualification framework that was competence based (Aitchison, 2003; P. Christie, 1997). The consequences of integration and competency within the schools sector was not really engaged within the Ministry of Education, which lacked leadership and was fragmented and weak, focusing on the bureaucratic process of amalgamating the 19 apartheid education departments into a single national department in 1995. When the White Paper on Education and Training of 1995 was released, it reflected these key ideas of integration and competency. This focus on competence quite suddenly became a proposal for the school curriculum to be underpinned by 'outcomes- based education' in a document that was released in late 1996 (Jansen, 1999b).

A new National Qualifications Framework (NQF) was launched which aimed to unite education and training. An outcomes-based school curriculum which was named Curriculum 2005 (C2005), followed in 1997. This Curriculum 2005 was based on three principles: outcomes-based education, integration of knowledge and progressive and learner-centred pedagogy. The literature produced by the national Department of Education at the time, urged teachers to embrace a 'new' approach which means active learners who take responsibility for their learning, on-going assessment, critical thinking, reasoning, reflection and action and the teacher as facilitator who constantly uses group work and team-work (Department of Education, 1997).

Although all curricula are political in the sense that they embody the educational vision of a particular government, C2005 carried an unusually overt political agenda (Harley & Wedekind, 2004). Morrow (2000) described OBE as the ‘New Scripture’, the path that was chosen to move South African education away from all that was bad about apartheid education. Its purpose was clearly to break down the divisions that had existed between academic and applied knowledge, between theory and practice and between knowledge and skills. Its purpose was to create tolerant citizens who would embrace the values of reconciliation and nation building (Department of Education, 1997).

C2005 was launched in 1998 in Grade 1 classrooms, in Grade 2 in 1999 and in Grade 3 in 2000. Although many teachers embraced C2005 as a political project which was different from apartheid education, their pedagogical responses were uneven (Harley & Wedekind, 2004; Jansen, 1999b). A range of criticism focused on two key areas: problems with implementing the curriculum, and problems with the structure of the curriculum itself. The national Department of Education did not assume responsibility for the implementation of the new curriculum, rather provincial departments were tasked with implementation (P. Christie, 1999). Potenza and Monyokolo (1999) argued that the teacher development and the learning materials necessary to achieve curriculum transformation were simply not in place. On the whole, teachers were very poorly prepared to teach the new curriculum. In terms of the structure of the curriculum, it was under-specified in terms of content. Some studies showed that many Foundation Phase teachers simply did not know what to teach (Education 2000 Plus, 2002; Jansen, 1999c). According to Jansen (1999d), the purpose of C2005 was symbolic and political, rather than pedagogical, and this would be one of the reasons for its failure.

1.4.3 The Review process

The appointment of a new Minister of Education in 1999 meant that there was the possibility of reviewing the curriculum. The incoming Minister of Education, Prof Kader Asmal, appointed a Committee to review C2005 in 2000. The Review Committee comprised eleven education specialists who reviewed all existing research

and evaluations, as well as public submissions and also interviewed teachers, principals, managers, trainers, publishers and departmental officials. Their task was to review the implementation and timeframes of C2005 and not its fundamental principle of outcomes-based education. Amongst the Review Committee's recommendations were that the jargon of C2005 be reduced and that a streamlined National Curriculum Statement be developed which would detail in clear and simple language the curriculum requirements at various levels (Department of Education, 2000b).

This streamlining process resulted in a revised set of curriculum statements for the General Education and Training band (Grades 0 – 9) that were produced in 2001. A new set of National Curriculum Statements for the Further Education and Training band (Grades 10 -12) was released in 2003. This study is concerned with the implementation of the FET history curriculum, which began in Grade 10 classrooms in 2006. Details of the development of the history curriculum in particular will be discussed in chapter 5.

1.4.4 The FET reform process

The FET curriculum reform process was underpinned by the same principles of the National Curriculum Statement for the GET band – that of outcomes-based education, learner-centred pedagogy, knowledge integration and a National Qualifications Framework. Essentially the approach is still driven by the idea that outcomes should be the drivers of all educational processes. One of the differences is that the FET curriculum has taken a more strongly disciplinary approach than the GET curriculum, for example Geography and History are taught separately at FET level, while they are put together under the Social Science Learning Area in the GET curriculum. In the initial designing of C2005, curriculum developers were not allowed to stipulate content at all (Siebörger, 1997). This approach was softened somewhat in the RNCS and in the FET curriculum, where lists of content do appear.

1.4.5 Critiques of OBE

Even though the Review of Curriculum 2005 attended to issues of content progression and sequencing, the underlying principle of OBE remains unchanged. There are researchers who argue that the outcomes-based model of education is flawed and will not reform South African education for the better. Morrow (2000) argues that the goal of transparency which is supposedly delivered by OBE's explicitly-stated outcomes in fact takes it into the direction of objectives and behaviourism, which leads on to an instrumental perspective of education. He says this perspective risks impoverishing our understanding of education and why we think it is valuable. He further argues that it is an illusion that pre-specified outcomes give teachers the freedom to reach these outcomes in whichever way that they like. It is an illusion because there are not uncountable ways in which to reach an outcome, and many teachers do not have the conceptual understanding required to do so. Lastly, OBE creates a great divide as to whether learning results in behaviour that is visible, or if it is in the mind. Morrow's own perspective is that learning is about being inducted into a particular practice and what we should be interested in is whether a learner can satisfactorily engage in a practice (of, for example, solving mathematical problems or reading poetry), and not whether they can display particular outcomes.

Allais (2006) critiques OBE from a knowledge perspective. She argues that this strongly outcomes driven approach is based on the belief that all knowledge is the same in nature, that there is no difference between everyday and scientific knowledge, or between vocational and academic knowledge. The idea is that level descriptors will be able to describe any kind of knowledge, and as long as learners are able to meet the outcomes it does not matter what content or what pedagogical processes were used to get them there. The assumption is that descriptors and outcome statements are transparent and their meaning is clear and unambiguous to anyone. Allais argues that these assumptions are in fact flawed, and that outcomes cannot be a meaningful basis on which to select content and pedagogy and neither are they transparent with an inherent meaning. As the sociologists of knowledge tell us (Bernstein, 1999; Moore, 2004; Muller, 2006b), the structure of the disciplines is not the same and some disciplines require hierarchically organized content which has strong progression.

Allais writes that the danger, one might say the tragedy, of the outcomes-based mechanism is not 'just that it fails as a means of qualification reform, but that its claims so dramatically outweigh what it can possibly do' (2006, p. 34). She argues that for the past decade the energy of the education system has been taken up in setting detailed outcomes and assessment criteria in the belief that quality education would automatically follow, whereas in fact the real work of education reform has not happened.

Its [an outcomes-based qualification-driven approach] pernicious effects are far broader because it claims to solve problems of curricula, learning, teaching and assessment, and proper attention is therefore not paid to the aspects of education, which are ultimately more important in improving quality than is the alignment of qualifications (p. 42).

1.4.6 Education and (in)equality

While the new outcomes-based curriculum hoped to bring about equality in children's learning experiences, the state has also worked at financially closing the resource gap between schools. Since 1994, the state has effected measures not only to equalise but also redress expenditure on all children. The gap between races has narrowed in terms of learner-teacher ratios and in terms of state per learner expenditure. For example children in the poorest schools have been allocated seven rand for every one rand allocated to children in the best-off schools (Fleisch, 2007). However schools are able to levy their own fees in addition to state funding, and previously-white and advantaged schools levy high fees which enable them to employ additional teachers (in some schools more than the half the staff are paid by the school governing body) and to maintain their infrastructure (which includes swimming pools, sports fields, libraries and computer centres). These are resources most black schools never had and still do not have.

So South Africa continues to have a deeply unequal education system, despite the intentions of the state. While all schools are open to all learners, where a child goes to school depends on his or her ability to pay the school fees levied (although legally schools may not turn away children who cannot pay the fees). Previously white

schools now teach children of all races, but these are advantaged middle-class children whose parents can afford the fees. Previously Indian schools now teach predominantly black African learners, as do previously 'coloured' schools. Previously black schools remain mono-racial and serve only black children (Soudien, 2004).

Evidence of the unequal achievement of primary school children shows that there are clearly two education 'systems' operating in South Africa in 2007. Fleisch (2007) puts it thus:

The first 'system' is well-resourced, consisting mainly of former white and Indian schools and a small but growing independent sector. It produces the majority of university entrants and graduates, the vast majority of children graduating with higher-grade mathematics and science. Enrolling the children of the elite, white-middle and new black middle-classes, the first system does a good job of ensuring that most children in its charge acquire literacy and mathematics competences that are comparable to those of middle-class children anywhere in the world. The second school 'system' enrolls the vast majority of working class and poor children. Because they bring their health, family and community difficulties with them into the classroom, the 'system' struggles to ameliorate young people's deficits in institutions that are themselves inadequate. In seven years of schooling, children do learn, but acquire a much more restricted set of knowledge and skills than children in the first system. They 'read' but mostly at a very limited functional level; they 'write' but not with fluency or confidence (p. 2).

Unfortunately the reality is that that first functional system, the schools for the rich, comprises only 20% of the learning population and the second system, the schools for the poor, serves the remaining 80% of children. This is unsurprising given the vast wealth disparities which continue to exist in South Africa, where in 2003 the top 10% of households earned nearly half (49%) of total income, and the top 20% of households earned 65% of total income (Shalem & Hoadley, 2007).

Ten years after the advent of Curriculum 2005, it is clear that learning outcomes have not been equalised and that the curriculum has been implemented and reproduced in these two schooling systems in quite different ways. There are many inequalities created by apartheid which could not be changed through a reformed curriculum, which brings to mind Bernstein's (1970) comment that education cannot compensate for society. In the last decade there have also been a number of policies that focus on teacher accountability and external regulation, and the state's expectations of teachers have grown (they are expected to fulfil a wide range of roles from assessor to

researcher and community developer). There is also evidence to suggest that teacher morale is very low (Chisholm et al., 2005).

Shalem and Hoadley (2007) argue that it is important to shift the lens from evaluative, accountability and efficiency accounts which see the teacher as the key agent for change to a lens where structural issues, such as to the close association between children's cognitive development (and thus school achievement) and family poverty (particularly during their early childhood), are taken into account. They argue for the usefulness of a labour process analysis, which suggests that teachers' pedagogical power to effect change cannot be conceived through a regulatory framework alone; but *in relation* to material conditions of possibility.

They suggest that inequality exists at three different levels that have an accumulative affect on the work of teachers. The first is inequality at the societal level, the second is at the level of the homes and communities of the children that attend school, and the third is inequalities at the level of the school. Thus a teacher working in a school for the poor would be working in school that is located in a poor community where many adults are unemployed, where there may not be piped water, where long distances have to be travelled. The children who attend the school probably live in crowded conditions, have not been exposed to reading in the home, may be malnourished, and have parents with low levels of formal education. The school itself will be poorly resourced, probably with basic classrooms, but few specialist rooms (such as a library, a computer room etc). All of these structural issues will impact on the teacher's work as well on her ability to implement new curriculum and other policy. These material realities form the backdrop to any curriculum reform efforts.

1.5 Education policy research

There is a vast range of literature that deals with the concept of policy research, changes in education policy and teachers' responses to such changes. In this section I review some of the key approaches to policy implementation and the so-called 'gap' between policy and practice. I then look specifically at education policy reform in developing countries and in South Africa specifically.

1.5.1 What is policy?

A policy is a public statement by a state about what it considers desirable in the realm of economics, education, health etc. Public education policies perform two main functions: to state the cultural norms which the state considers desirable, and to institute a mechanism of accountability. Most policies are shaped by the characteristics of previous ones. Policy is thus an instrument through which change is mapped onto existing policies, programmes or organisations (S. Taylor, Rizvi, Lingard, & Henry, 1997).

It is vital in the area of policy research to define conceptually what is meant by policy. Ball (1993) suggests that there are two conceptualizations of policy: policy as text and policy as discourse. Policies as text suggest that policies are representations which are encoded by the authors in different ways, via struggles and compromises, and decoded in different ways by those who need to 'implement' them. Ball argues that policies shift and change their meaning in different arenas. Policies are also discourses which are about what can be said and thought and who can speak, when, where and with what authority. We are spoken by policies; we take up the positions constructed for us within policies. However policy is not one or the other, rather they are both implicit in the other. Policies are also not simply 'things', they are also process and outcomes.

De Clercq (1997) suggests that there are two broad ways in which policies can be analysed. They can be conceived of as rational activities aimed at allocating resources and values, or they can be seen as exercises of power and control. The assumption here is that policies do not emerge in a vacuum, but reflect compromises between competing interests (S. Taylor et al., 1997). This perspective is understood as critical policy analysis, and is where this study is located. Within these broad frames, policies must be analysed in different ways depending on their nature and scope.

1.5.2 The relationship between policy making and implementation

The relationship between policy making and implementation has been the subject of much debate in the literature. Essentially there are seen to be two models of thinking about implementation, which are underpinned by different assumptions about the process. On one hand, there is the rational bureaucratic process model or state control model, which assumes an unproblematic translation of policy into action, and on the other hand, the conflict and bargaining model, which understands the policy process as loosely coupled and impossible to tightly control (de Clercq, 1997).

The bureaucratic process model assumes the ability of the state to drive the reform process in a pre-specified direction. This traditional 'rational' model of educational change has understood policy as being separated into policy development and policy implementation (S. Taylor et al., 1997). This model understands the implementation of policies as a linear process. The model assumes that policy intentions are acceptable and implementation is simply a matter of technical ability and the will of the implementing units, together with adequate resources (Kgobe, 2001). This approach fails to acknowledge the participation of various actors in the policy process.

The bargaining and conflict model recognizes policy implementation as a process of mediation between competing interests and recognizes the complexity of the implementation process (Vulliamy, Kimonen, Nevalainen, & Webb, 1997). Policy implementation is a constant bargaining process, where policy is transformed at each level of implementation, as individuals interpret and act on it. Many research studies into the implementation of official curriculum changes suggest that the state cannot control the school curriculum, but that teachers interpret the curriculum in particular ways. For example, in their study of the National Curriculum in England, Bowe and Ball argue that it is 'not so much being 'implemented' in schools as being 'recreated', not so much 'reproduced' as 'produced'' (1992, p. 114).

This perspective also acknowledges the issues of power inherent in curriculum change and that education reform is never a neutral or technical activity. Struggles over curriculum are essentially struggles over what education is for and whose knowledge is worth knowing (MacDonald, 2003).

This approach draws broadly on the educational change literature which points to the importance of linking curriculum change strongly to teacher development and to school development as it is very difficult for teachers to change within an unsupportive environment. Writers such as Michael Fullan (1991) argued that the change process is complex and cannot simply be mandated. The school improvement and school change literature also focuses on the important link between curriculum change and teacher's attitudes and values (Fullan, 1993; D. H. Hargreaves, 1995; D.H. Hargreaves & Hopkins, 1991). In fact more than thirty years ago, Stenhouse (1975) argued that in order for teachers to make curriculum changes, they first needed to develop attitudes congruent with the changes advocated.

Within the perspective that understands the policy process as political, complex and contested (as opposed to rational and linear), there are both macro and micro approaches to analysis. In his exploration of politics and policy making in England, Ball (1990) employs a macro analysis which involves three levels: the political, the ideological and the economic. He is concerned with education policy in relation to the political, ideological and economic, as well as these three levels in education policy.

There are also a number of studies that take a micro approach to examining the ways in which teachers work with and interpret new policies. For example, much research shows that it is not straightforward to inculcate 'new attitudes and beliefs', which many education policies advocate. In a study of California's new policy of teaching for mathematical understanding, Cohen and Ball (1990) show how teachers apprehend and enact new instructional policies in light of inherited knowledge, belief and practice. They observed teachers producing a remarkable mixture of old and new mathematics instruction.

1.5.3 The policy – implementation gap

Overall, there seems to be a consensus that despite a plethora of innovations over a number of decades, educational change happens very slowly, if at all. Over long periods of time, American schools have remained basically similar in their operation, often because students, teachers and parents have a clear sense of what a ‘real school’ looks like and have an investment in these familiar institutional practices (Tyack & Cuban, 1995).

There are a number of explanations for the so-called failure of educational reform. Those operating from the ‘bargaining and conflict’ model say that it is due to policy makers working within a rational and linear approach to policy. They would argue that policy makers simply do not take into account the complexity of the change process and the agency of teachers. On the other hand, those operating from a linear and rational perspective, see the problem as lying with ill-conceived policies, under-funding and recalcitrant teachers.

A focus on developing countries

There is a growing body of literature that focuses specifically on policy implementation in developing countries. Fuller (1991) has argued that policy operates at a purely symbolic level where there is enormous pressure on the new state to ‘look modern’. Similarly Jansen (1993) suggests that the curriculum change processes in newly independent nations such as Zimbabwe and South Africa have symbolic political value.

Psacharopoulos (1989) reviews the record of educational policy making in developing countries with a particular focus on Africa. He concludes that there are three key reasons for the failure of reforms. The first is that the intended policy was simply never implemented, often due to the fact that it was too vague, for example to ‘improve the quality of education’. The second reason is that the reform implementation was never completed or failed to achieve a critical mass to have an impact. An example here would be vocational schools which were boycotted by

parents. The third reason is that a policy was implemented but did not have the intended effect because it was based on an invalid theoretical model or based on insufficient evidence (for example that learner-centred methods in fact *don't* necessarily lead to improved achievement).

Psacharopoulos appears to be working from the assumptions of a top-down model of policymaking and implementation, that the state can in fact make changes. This is not surprising given that he works for the World Bank.

Jansen (1993) explains the various educational reforms that took place in Zimbabwe after independence in 1980. These included free, compulsory and universal primary schooling, Education with Production which was intended to eliminate the distinction between mental and manual labour and to destroy elitism, competition and classism and a 'new vocationalism' which was to make secondary schooling more practical and skills-oriented and less academic (p. 61). However, these reforms were not successful. By 1992, fee paying schools were reintroduced and the vocational reforms had limited impact; the school structure still follows an academic model.

Jansen suggests three reasons for the failure to transform the curriculum. He argues that the curriculum change was essentially a political tool and there are political limits to curriculum reform. The broader social and economic reforms that were needed to support a socialist school curriculum did not take place. Secondly, there was not sufficient mass support for the curriculum reforms. Too many influential groups (such as white business and the Catholic Church) did not support Education with Production and the vocationalism of the curriculum. Thirdly the curriculum reforms did not follow what most people were used to and expected from the curriculum. Traditionally, most people placed a high value on an academic curriculum and did not easily embrace the vocational curriculum.

There have been strong attempts to introduce learner-centred pedagogy throughout the developing world over the past decades, usually attached to projects funded by the World Bank. Tabulawa (1997) describes such an attempt in Botswana. He suggests that the technicist approach which focuses on materials and teacher in-service programmes, ignores the reality that pedagogical views are socially and historically

grounded. He argues that one of the main reasons that the new learner-centred pedagogy did not take root is due to the deeply held beliefs of teachers and learners, which were located in a 'banking education' paradigm. He shows that a number of historical factors such as the imported bureaucratic-authoritarian model of education from nineteenth century Britain, the missionary's and colonialist's belief in the supremacy of Western Culture and the authoritarianism inherent in Tswana society have helped to shape a view of education which is utilitarian and authoritarian. In this context, a democratic and learner-centred pedagogy faces 'tissue rejection'. He concludes that when teachers and students fail to adopt certain innovations, we should not just focus on the technical issues (such as lack of resources, poor training etc) but must also examine the beliefs and values of teachers. 'Where the values embedded in an innovation are incongruent with the values and past experiences of teachers and students, tissue rejection might be inevitable' (p. 202).

Learner-centred education was also introduced in Namibia after Independence as a way of overhauling the previous apartheid system of education (O'Sullivan, 2004). O'Sullivan's observation of lessons showed that primary school teachers did not implement 'learner-centred' methods as envisaged by the policy documents, despite saying that they did so. She suggests a number of reasons for this: teachers did not understand the meaning of learner-centred education; the implementation of such approaches requires highly qualified teachers; learner-centred approaches presuppose resources and small classes; pupils were not used to these approaches and finally, that the importance of critical thinking and questioning adults which underpins learner-centred approaches goes against what is considered appropriate in the cultural context, where the interests of the individual are subsumed by the group, and the relationship between adult and child is one of respect and authority. Instead, O'Sullivan suggests that it is more useful to encourage teachers to use *learning*-centred methods, where the focus is on ensuring that effective learning takes place.

Using evidence from primary schooling in Tanzania, Barrett (2007) argues that the problem is not that learner-centred teaching is not implemented by teachers, but rather that the problem is the dichotomy set up in policy between performance and competence modes of pedagogy. She argues that 'a polarized view of pedagogy fails to do justice to the educational values and teaching practices of many teachers

working within contexts of scarcity' (p. 274). Her suggestion is that in order to improve education quality in Tanzania, it would be most appropriate to improve teachers' performance-based pedagogies, rather than insisting that they teach in learner-centred ways.

South Africa's progressive Curriculum 2005 required that teachers use learner-centred teaching methods and integrate everyday knowledge into the classroom. In one study (Reeves, 1999), Grade 7 teachers in 10 urban township schools used a set of learning materials based on the C2005 Natural Science learning area. The materials were designed using the principles of learner-centred methods and integration between everyday and scientific knowledge. In her study of teachers' experiences of implementing these materials, Reeves (1999) shows that there are a number of factors which constrained their implementation. She suggests that the context, teachers' subject knowledge and skills and the effect of the C2005 model of strong integration were key factors which impacted on the implementation of the curriculum. In terms of context, time to teach was disrupted in many schools, making it difficult for teachers to cover the intended curriculum. The use of learner-centred methods of teaching was made difficult both by limited resources and large classes as well as the learners' level of development. In terms of teachers' pedagogic content knowledge, teachers in the study struggled to engage learners with concepts and higher order process skills authoritatively. Thus teaching and learning remained at the level of surface articulation of concepts and processes. The third factor relates to the curriculum's strong principle of closing the gap between scientific knowledge and everyday knowledge. Reeves suggests that teachers did not make explicit the means of distinguishing scientific knowledge from everyday knowledge. Efforts to make natural science concepts more accessible by using concrete representation sometimes obscured the scientific concept. Reeves' study does not show that teachers were *unwilling* to work within the progressive pedagogy espoused by the curriculum, but rather that they lacked the skills and knowledge to do so.

It is very clear from a range of research that a simple and linear transfer from policy to practice seldom happens and should not be expected. Studies in developing countries show that one reason that progressive curriculum reform often fails is due to the clashes between teachers' beliefs about teaching and the ideology of the

curriculum. But we should not assume that a progressive curriculum is inherently 'good'. There are also critiques about the nature of a progressive curriculum. Tabulawa (2003) critiques international aid agencies who insist on the implementation of learner-centred pedagogies in developing countries, when these pedagogies are located within particular ways of thinking and being which are congruent with Western cultures, as well as a particular resource-base which includes small class sizes and wide ranging educational materials. But there is also evidence to suggest that even in small classrooms, a curriculum which focuses too much on everyday knowledge rather than disciplinary knowledge does not induct learners into a discipline (Hoadley, 2005; Morais, Neves, & Pires, 2004; Naidoo, 2006).

I will show in my study that the new FET history curriculum requires that teachers have to engage with both a new history pedagogy (an enquiry-based pedagogy) and a new structuring or ordering of historical knowledge that is strongly conceptual. The focus of my study is not on whether history teachers implement the new curriculum 'correctly', but it is concerned with the substance and nature of the message carried by the NCS as well as the ways in which the policy message is re-fashioned as it moves through various levels of the education system.

1.6 The structure of the thesis

The thesis is structured around the framework of the fields of the pedagogic device.

Chapter 1 has introduced the theoretical and empirical fields of study and locates the study in its context of the curriculum changes in South Africa since 1994. It outlines the purpose and rationale for the study. It reviews the literature on policy research and on the research on educational reform and the so-called 'policy-implementation' gap, with a particular focus on the 'failure' of learner-centred pedagogies to take root in developing countries.

Chapter 2 describes the theories of Basil Bernstein with a particular focus on the theoretical resources provided by his concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal knowledge structures.

Bernstein provides a useful language of description to analyse the form of pedagogic communication, but does not focus on the quality of the message that is relayed. So I also draw on other analytic tools, particularly Bloom's Revised Taxonomy in order to analyse levels of cognitive demand in assessment tasks and questioning.

Chapter 3 describes the methodological issues of the study, and locates the study within an interpretive and critical realist stance. The study is a case study where the object of study is the recontextualisation of the history curriculum. A range of data were collected using a range of methods. This chapter also describes how the various data were analysed using a combination of deductive and inductive analysis methods. I argue that a range of analysis tools is needed to interrogate various kinds of data collected from different fields of the pedagogic device.

Chapter 4 is located within the field of production of the pedagogic device. It is concerned with the production of the discourse of history and asks questions like what is the nature of history? Bernstein's concepts of vertical and horizontal knowledge structures are used to interrogate the structure of the discipline and to look towards how it might be recontextualised as a school subject. This chapter also traces the key shifts in how history has been understood as a school discipline.

Chapter 5 explores the question of how and why the history FET curriculum came to look like it does. Theoretically this work is located in the official recontextualising field (ORF) of the pedagogic device. Its concern is how the state and its agents recontextualise history knowledge from the field of production and legitimate what history should be taught in South African classrooms. The chapter first describes the development of the history curriculum in South Africa since 1990 as the curriculum development processes that preceded it influenced the FET curriculum making process. The second section focuses on the process of the writing of the FET history curriculum, which is the specific curriculum pertinent to this study.

Chapter 6 is also located in the official recontextualising field (ORF) of the pedagogic device. It analyses the two history curriculum documents used in South African high schools over the past ten years. These are the 1996 Senior Certificate Syllabus for History (Higher Grade) and the 2003 National Curriculum Statement for History

Grades 10 -12 (General) which was implemented in Grade 10 classrooms in 2006, Grade 11 classrooms in 2007 and Grade 12 in 2008. The analysis concerns the knowledge, pedagogy, discourse and competences and assessment in the two curriculum documents. The analysis was done both deductively and inductively. Bernstein's concepts of framing, classification and regulative and instructional discourse were used to describe modes of pedagogy, knowledge, discourse and competences. Bloom's Revised Taxonomy was used to describe cognitive demand of the learning outcomes and assessment standards. Inductive analysis was used to capture important concepts that were not captured by the deductive tools, such as assumptions about the epistemology of history and historical thinking.

Chapter 7 is located in the Pedagogic Recontextualisation Field (PRF). It examines two aspects of the PRF, namely a teacher training workshop and the way in which publishers and textbook writers interpret the curriculum. It provides a narrative of one week-long training workshop which took place in October 2005. A provincial department official facilitated the workshop. The purpose of the workshop was to prepare teachers to implement the new history curriculum in 2006. The chapter then draws on interviews with publishers and authors from three different publishing houses about their experience of interpreting the National Curriculum Statements in order to produce Grade 10 history textbooks for use in 2006. The purpose of the chapter is to examine how the official discourse is recontextualised in the PRF.

Chapter 8 is located within the field of reproduction and presents the data collected in three different Grade 10 classrooms in 2005 and 2006. Each school is presented as a case study, where the context of the school is described, the Grade 10 history teacher is introduced and the pedagogic practice of each teacher is described.

Chapter 9 is also located within the field of reproduction, but moves the analysis up one level. The chapter reduces and quantifies the pedagogic practice in each classroom. It does the same for what other research tells us about preferred pedagogic practice for cognitive access and the pedagogic discourse of the History NCS. Standing on the foundation of an empirically- defended preferred pedagogy, it is thus possible to compare and contrast the pedagogic discourse across classrooms, and with the requirements of the NCS.

Chapter 10 describes teachers' perceptions of teaching the new history curriculum and as such is also linked to the field of reproduction. Each teacher had quite different perspectives, and while their views are obviously personal perspectives, they can also be linked loosely to the kind of schools in which they teach, the particular subject identity each has as a history teacher and the way in which apartheid education worked to create the identities of teachers.

Chapter 11, the final chapter, reviews the research questions and how the study has addressed these. It summarises the key findings at the different levels of the pedagogic device and addresses the methodological issues of working across the various levels of the device with different kinds of data. It also discusses key methodological issues around the use of Bernstein's language of description and how useful this proved to be to interrogate data at different levels of the device.

1.7 Conclusion

This chapter has located the study in its theoretical field which is the sociology of education and its empirical field which is curriculum reform in South African high schools. The main focus has been on the empirical field and it has described the history and context of schooling in South Africa, as well as the curriculum reform that has been ongoing since 1997. South Africa adopted an outcomes-based curriculum for schooling, influenced by the debates in the labour and training fields. The original version, Curriculum 2005 was informed by a weakening of disciplinary boundaries and a focus on everyday knowledge as well as a progressive pedagogy. Both these moves were framed as part of an emancipatory project. However, there is little evidence to suggest that the new curriculum has narrowed inequalities in teaching and learning. Educational inequality remains pronounced, with schools which levy high fees and serve the middle class producing higher educational achievement than those that serve the poor. This study is situated against this backdrop.

This chapter has also located the study in the field of policy studies. There are two distinct ways of understanding policy research. The first is located in the rational and

linear perspective that presumes the state is able to make interventions which are unproblematically implemented. The second is located in a bargaining and conflict model which recognises the complexity and contested nature of policy implementation. This study is located within the latter perspective.

The theoretical field is explained fully in Chapter 2. It describes Bernstein's concepts of the pedagogic device, pedagogic discourse and knowledge structures.

Chapter 2

Theoretical concepts

To me, wherever there is pedagogy there is hierarchy. What is interesting, it's the language of description that we use, because the language of description masks hierarchy, whereas the language of description should attempt to sharpen its possibility of appearance

Bernstein, 2001, p. 375

2.1 Introduction

The work of this study is to use the theoretical concepts of the pedagogic device to answer the question: How is history knowledge (as codified in the new National Curriculum Statement Gr 10 -12) recontextualised into pedagogic communication? It aims to track the creation, recontextualisation and acquisition of the new FET history curriculum using the theoretical resources provided by Bernstein's concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal knowledge structures.

This study is informed by Bernstein's work in the sociology of education, with a particular focus on the pedagogic device. However, this macro approach must be more finely layered to the point that it can speak directly to the data and the data can speak back to the theory. This chapter aims to explain the key ideas and concepts of the theory, while the methodology chapter (Chapter 3) explains how the key concepts have been developed into analytic categories.

Basil Bernstein was a British social theorist who developed his sociological theory of pedagogy over more than three decades until his death in 2000. In a clear and concise overview, Maton and Muller (2007) show how Bernstein's theoretical thinking

developed from pedagogic code to pedagogic discourse to knowledge in the latter part of his life and career. Bernstein's major focus was on understanding how education could be understood in its own terms, and not merely as a relay for social class and other inequalities. He believed that cultural reproduction studies examined what is carried or relayed by education, such as class, gender and race inequalities, rather than 'the constitution of the relay itself' (Bernstein, 1996, p. 39). These studies did not focus on any internal analysis of the structure of the discourse itself. He wanted to explicate the inner logic of pedagogic discourse and its practices.

Bernstein made a distinction between what is relayed (the message) and an underlying pedagogic device that structures and organizes the content and distribution of what is relayed. The key process is recontextualisation, whereby knowledge produced at one site, that of knowledge production (mainly, but not exclusively, the university), is selectively transferred to sites of reproduction (mainly, but not exclusively, the school). This process is not straightforward and cannot be taken for granted (Moore, 2004, p. 136). The focus of this study is this process of recontextualisation, using the history curriculum as a case study. The pedagogic device is used to frame the study.

In this chapter I describe aspects of Bernstein's theory that are pertinent to this study, namely the pedagogic device, pedagogic discourse, classification and framing, modes of pedagogy and vertical and horizontal knowledge structures. I also describe how I used Bloom's Revised Taxonomy to describe the concept of cognitive demand which was not captured by Bernstein's concepts.

2.2 Languages of description

Bernstein provides a language of description that describes education in its own terms. Bernstein's method distinguishes between two qualitatively different languages in theory and research. On the one hand, there is the language of a theory itself – a language internal to it – and on the other, the language that describes those things outside the theory within the field it investigates, an external language of description (Moore, 2004). According to Bernstein:

A language of description constructs what is to count as an empirical referent, how such referents relate to each other to produce a specific text and translate

these referential relations into theoretical objects or potential theoretical objects. In other words the external language of description (L^2) is the means by which the internal language (L^1) is activated as a reading device or vice versa (2000, pp. 132, 133).

Moore (2004) suggests that many other accounts of education (such as liberal, feminist, Marxist etc) operate through processes of alternative interpretation, but do not translate educational processes into a theoretical language the terms of which are internal to the theory itself. The principles of pedagogic discourse can only be expressed conceptually in terms that are discontinuous with empirical descriptors: e.g. the way that Bernstein produces the concept of ‘invisible pedagogy’ as weak classification and weak framing (-C/-F) through a set of transformations that begin with an empirical description that is then theoretically translated into a term wholly conceptual in character, a term within an internal language of description.

According to Moore,

...this means designing research instruments that are sufficiently precise and robust that they can engage with data in such a way that (a) the theory can ‘recognise’ its concepts in the world, and (b) the world can ‘announce’ itself to the theory in such a way that the theory can be modified in the light of experience (2004, p. 143).

How then to create an external language of description that can recognise the key theoretical concepts in the data and can allow the data to speak to the theory? It was important to operationalise the concepts of classification and framing so that they could be recognised in the data. The language of description provides ‘the basis for establishing what are to count as data and provides for their principled reading’ (Ensor & Hoadley, 2004, p. 92). The language of description must be detailed enough to enable any researcher to recognise why a particular classroom incident was coded as strongly framed, for example. In this sense an explicit language of description enhances the inter-coder reliability of the data analysis, as other researchers should be able to code a chunk of data in the same way. It also enhances validity in that it is transparent and relatively open to interrogation (Ibid., p. 97).

This study makes use of a Bernsteinian framework because the internal language of description can be developed into an external language of description that can be used to ‘read’ both the curriculum documents and the pedagogic discourse in Grade 10

classrooms. How this external language is developed is described in the methodology chapter (Chapter 3).

Any theory shines a particular light on a set of data, and in doing so, also creates shadows. No one theoretical position can explain everything. Ball (1993) suggests that when it comes to analysing complex social issues, like policy, two theories are probably better than one. Bernstein was concerned with the *relay*, and not the qualitative texture of what was relayed. An analysis of the classroom data generated by this study made it clear that Bernstein's concepts are not able to differentiate between the qualitative differences I observed in the three history classrooms. Some of these differences centred on the levels of cognitive complexity in the learning process. In order to describe these, I make use of Bloom's Revised Taxonomy (Anderson et al., 2001). This chapter describes later how Bloom's work was used, but first describes the key concepts recruited from Bernstein's work.

As the study progressed, it also became clear that both Bernstein and Bloom were too generic in that they did not address the speciality of history in particular. The work of Martin (2007) and Coffin (2006a) who work from a functional linguistics frame points the way to an understanding of history as a distinct knowledge structure. Dowling's (1998) work in mathematics provides a language to describe the semantic content of what is classified, but this needs to be reworked for the specificity of history. I touch on their work, but it is beyond the scope of this study to engage with it thoroughly at this point. That work must come later.

2.3 The rules of pedagogic practice as cultural relay

For Bernstein (1990), the inner logic of any pedagogic practice can be understood as a relay, a cultural relay: a uniquely human device for both the reproduction and production of culture. The pedagogic relation consists of transmitters and acquirers – essentially and intrinsically, an asymmetrical relationship.

The essential logic of any pedagogic relation consists of the relationship essentially between three rules: the hierarchical rule, sequencing rules and criterial rules. The

hierarchical rule is about learning to be an acquirer and learning to be a transmitter, it is about learning the rules of social order, character and manner. *Sequencing* rules are about what comes before and what comes after, since transmission cannot always happen at once. The sequencing rules imply pacing rules – that is, how much time is given to acquire the sequencing rules? The *critical* rules enable the acquirer to understand what counts as a legitimate or illegitimate communication, social relation or position.

2.4 Bernstein’s model of pedagogic discourse

Bernstein was concerned with the actual relay of pedagogic communication. He asked the question: “We know what it [pedagogic communication] carries, but what is the structure that allows, enables it to be carried?” (Bernstein, 1990). For Bernstein, the relay of pedagogic communication is pedagogic discourse (Hoadley, 2005).

Pedagogic discourse is a rule that embeds two discourses: a discourse of skills of various kinds and their relations to each other (instructional), and rules that create social order (regulative). In Bernstein’s view there are not two discourses, there is only one, which is the regulative discourse. Bernstein classifies the hierarchical rules as regulative rules and the sequencing and critical rules as instructional or discursive rules (Bernstein, 1990).

ID (sequencing, pacing and critical rules)

RD (hierarchical rules)

Both the instructional discourse and the regulative discourse can be described in terms of classification and framing.

2.4.1 Classification and framing

In terms of pedagogy, Bernstein was essentially interested in the question: how does power and control translate into principles of communication, and how do these principles of communication differentially regulate forms of consciousness with respect to their reproduction and the possibilities of change? (1996). Bernstein

distinguishes analytically between power and control, although empirically they are embedded in each other. Power relations create, legitimate and reproduce boundaries *between* different categories of groups. Thus power always operates on the relations *between* categories. Control establishes legitimate forms of communication appropriate to the different categories. Control constructs relations *within* given forms of interaction (Bernstein, 1996).

Bernstein then goes on to translate power and control into two concepts, classification and framing. These two concepts can then be used to generate descriptions of different modalities of pedagogic discourse.

Bernstein uses the concept of classification to examine relations between categories (such as agents, discourses, practices, subject disciplines). *Classification* refers to the strength of the boundaries between objects. He uses the example of discourses of a secondary curriculum, such as the subjects that are taught. A subject like history has meaning that is understandable only in relation to the other subjects that are taught. It has an identity that is created because of the space between it and another category. If that insulation is broken down, then a category is in danger of losing its identity. What preserves the insulation is power (Bernstein, 1996).

Classification can be used to describe the strength of the boundaries between knowledge in schools and classrooms. There are boundaries that may be weak or strong between the disciplines (inter-disciplinary boundaries), between different topics within the same discipline (intra-disciplinary boundaries), or between the school discipline and everyday knowledge (inter-discursive boundaries, as the boundary is between the vertical, school discourse and the horizontal, everyday discourse).

Where classification is strong, contents are well insulated from each other by strong boundaries; things must be kept apart. Where the classification is weak, things must be brought together (Bernstein, 1971; 1996). However, in keeping with a sociological perspective, Bernstein maintains that we must ask ‘in whose interest is the apartness of things, and in whose interest is the new togetherness and the new integration?’ (Bernstein, 1996, p. 26)

Framing is about *who* controls *what* (Bernstein, 1996). It refers to the degree of control that the transmitter (the teacher) or the acquirer (the learner) has over the selection, sequencing, pacing and evaluation of the knowledge transmitted in the pedagogical relationship. Where the framing is strong the transmitter has explicit control over selection, sequencing, pacing and evaluation. Where the framing is weak the acquirer has more *apparent* control (Ibid. italics in the original). Bernstein uses the word *apparent* as his model is based on the assumption that the teacher is always in control; however there are certain pedagogic modes (such as progressive pedagogy) where it *appears* that the learner has control. According to Bernstein (1990), control is always present in a pedagogical relationship, what varies is the *form* that this control takes. Framing is used to analyse the *form* of the lesson episodes and classification is used to analyse the *content* of the lesson episodes.

Bernstein distinguishes analytically between two systems of rules that are regulated by framing. These are the rules of the social order and rules of the discursive order. The rules of the social order are called the regulative discourse and the rules of the discursive order, the instructional discourse. The rules of the discursive order refer to selection, sequence, pacing and criteria of the knowledge (1996). Bernstein suggests that the strengths of framing can vary over the elements of the instructional discourse. For example in a group work task the pacing might be weakly framed as learners can work in their own time, but the selection of content could be strongly framed, if the teacher has selected the content. The strengths of framing can also vary between instructional and regulative discourse.

Once he has described the concepts of classification and framing, Bernstein then introduces internal and external features to make the description more fine-grained.

Classification always has an external value because it is concerned with relations. But it can also have an internal value (Bernstein, 1996). Taking an example of a classroom, internal classification would refer to the space and the way in which space is occupied in the classroom. If the space is strongly bounded and there are specific places for specific activities to take place, we would say there is a strong internal classification. External classification would refer to the permeability of the spaces between the classroom and school. For example, if other teachers and learners move in and out of the classroom quite freely, the classification would be weak as the boundaries are permeable.

The external value of framing refers to the controls on communications outside that pedagogic practice entering the pedagogic practice. Where the external framing is strong, it means that the images, voices and practices of the school are informed by societal norms, which may make it difficult for children of marginalized classes to recognise themselves in the school.

The concepts of classification and framing make it possible for researchers to systematically describe pedagogical discourse across various elements, and to move away from the rhetoric of ‘learner-centred’ or ‘teacher-centred classrooms’ (Ensor & Hoadley, 2004; Reeves, 2005).

2.4.2 Pedagogic codes

Classification and framing provide the grammar for the instructional and regulative discourse. They tell us about the power and control relations in the transmission process, and how they translate into particular codes. Codes refer to an orientation to organizing experience and making meaning (Hoadley, 2005). According to Bernstein the fundamental definition of code is a ‘regulative principle, tacitly acquired, which selects and integrates *relevant meanings*, the *form of their realisation* and *evoking contexts*’ (2000, p. 109, original emphasis).

The concepts of classification and framing and their internal and external features enable the pedagogic codes to be written.

E

$$\pm C^{i-e} / \pm F^{i-e}$$

Under E (elaborated orientation) we have the values + (strong) or – (weak) and then the functions $\pm C^{i-e} / \pm F^{i-e}$ where ‘i’ stands for internal and ‘e’ for external.

In this way we can show how the distribution of power and principles of control translate themselves in terms of communicative principles and spatial relationships (Bernstein, 1996).

As Cs and Fs change in values, from strong to weak, then there are changes in organisational practices, changes in discursive practices, changes in transmission practices, changes in psychic defences, changes in the concepts of the teacher, changes in the concepts of the pupils, changes in the concepts of knowledge itself, and changes in the forms of expected pedagogic consciousness (Bernstein, 1996, pp. 29, 30).

The work of this study is to track the changes of classification and framing values through the process of curriculum reform and to describe what other changes then take place in organisation, discursive and transmission practices and in the concepts of the teacher, the learner and of knowledge itself.

Bernstein developed his initial definitions of codes as *elaborated* and *restricted* based on socio-linguistic research done in the 1970s which examined the relation between social control, maternal modes of control and communicative outcomes (Hoadley, 2005). Over the years he refined the concept of code and elaborated codes came to refer to the prioritising and deployment of context-independent meanings as opposed to restricted codes which refer to context-dependent meanings.

Bernstein (1996, p. 33, 34) explains a study reported in Holland (1981) where groups of seven year olds were given a series of cards showing pictures of food. Bernstein comments that the instructions were weakly framed and weakly classified – the learners were free to choose any pictures, free to put them together in any way they like and for any reason that they liked. After the children had grouped their pictures they were asked the reasons why they had grouped the pictures in that way. One type of reason was linked to the child's life context (things like 'I eat these for breakfast' or 'I don't like these'). The other type of reasoning referred to something that the pictures had in common (such as 'They come from the sea', 'They're vegetables'.) The first set of reasons is embedded in a local context with a direct relation to a specific material base (restricted code) and the second type of reason references an indirect relation to a material base (elaborated code). Initially it was found that middle class children were more likely to offer reasons that had an indirect relation to a specific material base, and the working class children were more likely to offer reasons which had a direct relation to a specific material base.

The other interesting finding was that when the children were asked to find a second way of grouping the foods, many middle-class children used a context-dependent reason while the working class kids continued to give the same context-dependent reasons they had on the first sort. Hence Bernstein and Holland concluded that middle class children had two principles of categorisation, which stood in a hierarchic relation to each other. They wanted to know why the middle-class children selected one type of reason first and why did the working class children offer only one type of reason?

Bernstein (1996) suggests that the working class children take the coding instruction at face value (weakly framed), and the children select a non-specialised recognition rule that in turn regulates the selection of non-specialised contexts. The children do not recognise this as a task that requires them to sort using formal or school principles. This contrasts with the middle class who initially recognised the context as specialised and understood that it must be understood in a particular way that is using formal or school categorisation principles, *even though* the coding instruction was weakly framed. Thus the middle class children recognised a strong classification between school and home.

Moore (2004) says that at no point did Bernstein argue that working class people speak only in a 'restricted' code and middle class only in an 'elaborated' code. Rather his concern was to understand the orienting conditions whereby particular groups come to recognise the specialised features of contexts that call for elaborating discourses.

The 'restriction' upon restricted codes is not cognitive, but cultural and contextual: meaning is restricted to 'those in the know', who share basic cultural values, assumptions and understandings. Meanings can be conveyed in ways that are highly condensed symbolically, in few words or in gestures that 'speak volumes'. ... What are differentially distributed between groups are the recognition and realisation rules and orientations to meaning whereby they can successfully distinguish between that which can be assumed and taken for granted and that which is calling for a *demonstration* of understanding within a specialised context such as a classroom, tutorial or examination (Moore, 2004, p. 140).

Bernstein's theory of code is central to his concern about how we organise experience and make meaning, and his theorising of pedagogic discourse (the instructional

embedded in the regulative) provides a means for describing how his happens in pedagogy (Hoadley, 2005, p. 49).

2.4.3 Recognition and realisation rules

Classification and framing in turn are linked to recognition and realisation rules respectively. Simply, recognition rules regulate what meanings are relevant. Bernstein (2000) gives the example of young children coming to school for the first time. Some may fail to recognise the unique features that give a classroom a specialised character and this can lead to inappropriate behaviour. Other children are well aware of the differences between the school context and the family context. These children are in a more powerful position with regard to school than those who do not recognise the speciality of the context. Those who recognise the context in this example are likely to be middle class children, and this strong classification of school and home is a product of the symbolic power of the middle class family. ‘As the classification principle is established by power relations and relays of power relations, then recognition rules confer power relative to those who lack them’ (p. 105).

Recognition rules are a necessary condition for producing the legitimate context-specific text, but they are not sufficient. One still has to know how to make or realise this text, and to do so it is necessary to acquire the realisation rule (Ibid.). Realisation rules regulate how the meanings are to be put together to create the legitimate text. A text is ‘anything which attracts evaluation (which could be no more than how one sits or how one moves)’ (Bernstein, 1996, p. 32). Thus using the above example, the children who recognise the specialty of the context, are more likely to produce the range of behaviour that the school expects (that is, they will be able to create the legitimate text). The legitimate text which attracts evaluation in a classroom might also be that which children must produce for formal assessment purposes, such as a business letter, an annotated diagram, a painting, a dramatized role play. Thus children who are required to produce an election poster for a political party in a history class, must both *recognise* what elements make up an effective political poster (clear slogan, uncluttered space, bold colours, readability etc) and be able to actually make such a poster (*realise* the task).

2.5 Modalities of pedagogic practice: visible and invisible pedagogies

Bernstein (1990) uses the rules of the regulative and discursive order to distinguish between two generic types/ modalities of pedagogic practice. Pedagogic practice that displays explicit hierarchy, explicit sequencing and explicit evaluation criteria, he called a visible pedagogy. When these rules are implicit or hidden and known only to the transmitter, he called this an invisible pedagogic practice. Visible pedagogies show clear power relations in the classroom, whereas invisible pedagogies mask the power relations, so that it is difficult to distinguish the transmitter. Visible pedagogies place the emphasis on external gradable texts while invisible pedagogies focus on the procedures and competences that all learners bring to the classroom.

The criteria that distinguish visible and invisible pedagogies are tabulated below. However it is important to recognise that Bernstein did not aim to reduce these ideal types into neat dichotomies, but rather uses the terms as a heuristic device.

Table 1: Characteristics of visible and invisible pedagogies (Bernstein 1990)

Visible pedagogies	Invisible pedagogies
Places the emphasis on the performance of the child, upon the text that the child is creating and the extent to which that text is meeting the criteria – emphasis on the external product of the child.	The discursive rules (instructional discourse) are known only to the transmitter, so the pedagogic practice is invisible to the acquirer, essentially because the pedagogic space appears to be filled by the acquirer.
Will act to produce differences between children: they are necessarily stratifying practices	Less concerned to produce explicit stratifying differences between acquirers, because they are less interested in matching the acquirer's text against an external common standard. Focus not on a 'gradable' performance but upon procedures internal to the acquirer.
Focus on an external gradable text	Focus upon the procedures/competences which all acquirers bring to the pedagogic context.
Emphasizes transmission- performance	Emphasizes acquisition – competence

As can be seen from the final row in the table, the modalities of visible and invisible pedagogy are further linked to what Bernstein (1996) calls performance and competence pedagogic models, which are described presently.

With regard to visible and invisible pedagogies, visible forms are regarded as conservative and invisible forms are regarded as progressive (Bernstein, 2000). This is seen clearly in the South African curriculum developments since 1997, where learner-centred teaching methods are labelled ‘new’ and thus good, and transmission methods are labelled ‘old’ and thus unacceptable. The outcomes-based curriculum has essentially emerged as a hybrid (Harley & Parker, 1999) which seems to be invisible (competence) in terms of learner-centred pedagogy and implicit hierarchical rules, but visible (performance) in terms of assessment where outcomes and assessment standards and criteria are clearly specified.

Bernstein (2000) argued that the conflict between visible and invisible forms was an ideological conflict between different factions of the middle class about the forms of control, and not simply a conflict between classes. He makes a distinction between people located in the field of production that carry out functions related to the economic base of production, circulation and exchange and those located in the field of symbolic control. These are people who work in education, social services, counselling agencies, religious and legal institutions, universities, research agencies, and government agencies. Those in the field of symbolic control are said to control the discursive codes, while those in the field of production dominate the production codes. He proposes that location and hierarchical position in the field of either symbolic control or economic field regulates distinct forms of consciousness and ideology within the middle class. Bernstein (2000) describes research that showed that invisible pedagogy is likely to be advocated by those within the field of symbolic control working in agencies specialising in symbolic control.

Bernstein subsequently linked the descriptions of visible and invisible pedagogy to performance and competence models of pedagogy respectively.

2.5.1 Performance and competence models of pedagogic practice

According to Bernstein, (1996) a performance model of pedagogic practice places the emphasis on a specific output of the acquirer and on the specific skills necessary to

produce this output, text or product. The recognition and realisation rules for legitimate texts are explicit. Acquirers have relatively less control over the sequencing, selection and pacing of knowledge. Classifications are strong, both over knowledge and over space. Pedagogic spaces (that is, where learning can take place) are clearly marked and regulated. The emphasis on evaluation is what is missing in the product. The criteria are explicit and specific.

A competence model of pedagogic practice apparently allows the acquirers a measure of control over selection, sequencing and pacing of knowledge. Recognition and realisation rules are implicit. Classification is weak, both over knowledge and over space. Acquirers have considerable control over what spaces can be construed as pedagogic spaces. In terms of evaluation, the emphasis is on what is present in the acquirer's product. The criteria of the instructional discourse are likely to be implicit, but the regulative discourse criteria are likely to be more explicit. This means that the criteria for knowledge and skills will be implicit, but the kind of behaviour and attitudes that are expected will be made clearer. This competence model can be recognised in progressive pre-primary and primary school classrooms.

However, according to Muller and Gamble (forthcoming) these proto-concepts of visible (performance) and invisible (competence) pedagogies left the theory with a description of the consequences of the different pedagogic modalities, rather than a clear sense of exactly what was visible or invisible. Did everything need to be strongly classified and framed to render the invisible visible? Davis (2004) shows that neither a completely invisible nor a completely visible pedagogy can logically succeed. The strength of both classification and framing can vary independently of each other, which means pedagogy can show a great number of variations. For example if one takes three variations of classification (inter-disciplinary, intra-disciplinary and inter-discursive) and three variations of framing (the hierarchical, distributive and evaluative rules), together with the variations of each being either strong or weak, this means that there are 64 variations that describe some of the basic forms involved in the processes of engaging with knowledge structures that have been designed for systematic learning.

2.5.2 A preferred mixed pedagogy

More empirical classroom work has refined the theory to specify a more nuanced mixed pedagogy that particularly supports the learning of the working class. Bernstein's specialised language of classification and framing provides researchers of classroom practice with the means to link empirical evidence to a theoretically generated network of related concepts which make visible how power and control translate into principles of communication (Michelson, 2004; Muller & Gamble, forthcoming). This has been done most thoroughly by the Sociological Studies of the Classroom (ESSA) Group in Lisbon, and has been built on by others. The ESSA group led by Morais has engaged in empirical work in primary school science classrooms to establish the preferred pedagogical practice that leads to the development of science concepts for all, but especially working class children (Morais, 2002; Morais & Neves, 2001; Morais et al., 2004).

The ESSA group studied both the *how* of teaching and learning (operationalising Bernstein's pedagogic discourse) and the *what* of teaching and learning (using levels of scientific knowledge and investigative competence). Children's achievement in science was explained mainly by the *what* of pedagogic practice, which is to say teachers focused on developing high level and complex competencies and themselves had high knowledge proficiency. However, this is a necessary, but not sufficient condition. Their research shows that in terms of pedagogic practice, a mixed pedagogic modality produced the highest degree of success amongst all children. The key elements of this mixed pedagogic practice are: strong framing of the evaluation criteria, weak classification of intra-disciplinary relations, weak classification of teacher and child space, and in terms of the regulative discourse, weak framing of child-child hierarchical rules. In order for the teacher to communicate the criteria in a comprehensive way, weak framing of pacing and a personalised attitude to learners (weak framing of the hierarchical rules) are also necessary.

Hoadley's (2005) study in Grade 3 classrooms in Cape Town found that pedagogy in two middle class schools differed from that in two working class schools in key regards. With regard to mathematics pedagogy (Hoadley, 2007) in the middle class schools, classification was strong, the hierarchical framing was weak in terms of

teacher-child relations, pacing was weakened and the evaluative criteria for the legitimate text were explicit and strongly controlled by the teacher. In contrast in the working class schools, the activities were weakly classified with respect to everyday knowledge and mathematical knowledge and the evaluative rules were weak or absent. Learner's responses to a mathematics test showed that many did not recognise the specialised context and used everyday or localised strategies to approach the problems.

Morais et al. (2004) show that a necessary, but not sufficient, condition to learners achieving in science is that teachers have high knowledge and that they develop high level cognitive skills in learners. In South Africa, this necessary condition is not always present in classrooms, and was not present in Hoadley's working class classrooms. It is clear that shifting 'the how' of pedagogic discourse in South African classrooms might only succeed if the 'what' is also in place. Both Morais et al. (2004) and Hoadley (2005) are working within primary school classrooms and within subjects that are vertically structured (science and mathematics). We need to ask if this same pedagogy would be appropriate in a high school classroom, and for a horizontally structured subject like history?

There are no Bernsteinian studies in high school history classrooms, and very few in high schools. Rose's (2004) work in Australia examines literacy development from the lower primary up until high school. He shows that literacy is explicitly taught in the early primary school, but from the fourth year of primary school and in secondary school, the pacing becomes strongly framed and the evaluation more implicit, with the expectation that learners have already acquired sufficient competency to read to learn. Through reading large amounts of content in texts, elite learners implicitly acquire the knowledge of the genres of academic study. He argues that in order that indigenous learners are not left behind, the framing of the criteria need to remain explicit throughout the secondary school.

So from a small range of empirical studies in different countries and classrooms, a preferred pedagogy, which will enhance learning for all children, begins to emerge. At the level of the classroom and with respect to knowledge, it is about clearly inducting the child into the specialty of the particular discipline through strong

classification at an inter-disciplinary and inter-discursive level. Intra-disciplinary classification can be weakened. At the level of framing it is about loosening the hierarchical rules so that there can be open communication between learners and the teacher. All the research shows that the evaluative criteria must be explicit and strongly framed, so learners know what the legitimate text is. Muller and Gamble (forthcoming) argue that in addition, there needs to be strong framing at the curriculum level over the external selection of content in that the curriculum must make it clear what should be learnt.

In this study, this preferred pedagogy generated through research acts as a reference point against which the pedagogic discourse in the history curriculum and the pedagogic practice observed in history classrooms is compared. However, it is important to recognise that while this research on a preferred pedagogy is important in pointing to the aspects of pedagogy that seem to make a difference to the learning of all children, there can never be one universal, prescribed pedagogy that ‘works’ in every classroom context, with every teacher. The other caveat is that this ‘preferred pedagogy’ generated in science, maths and literacy classrooms may not map exactly onto history pedagogy.

Questions must be raised regarding the issue of explicit evaluative criteria. What are the evaluations of? Muller (2007) argues that they should be of the knowledge steps to be traversed, but the South African curriculum stipulates that teachers make evaluations of the outcomes, which tend to describe skills rather than specify knowledge. The evaluative rule in Bernstein’s terms does not help us to make a distinction between the criteria of skills and the criteria of content, which in the case of the NCS are differently framed.

The work of Paul Dowling enables one to make a distinction between the classification of skills and the classification of content. Dowling (1998; 1999) moved away from Bernstein’s concepts, eschewing framing all together and developing an external language of description in the gap around classification. He considers the strength of classification of a discourse as varying according to two dimensions – classification of content and mode of expression (Ensor & Galant, 2005). According to Dowling, a domain of practice refers to pedagogic activity in terms of two

components, firstly the signifier (ie. its form of expression – the words, symbols, layout and format used in a pedagogic communication) and secondly, the signified (ie. the nature of the content principally denoted by the signals). Each of these components may be described as either weakly or strongly classified according to the level of ambiguity of each with respect to other activities.

The combinations of strong and weak descriptors of classification for signifiers and signified give rise to four distinct domains of practice. A domain of practice is considered to be ‘esoteric’ if both content and form of expression are strongly classified. Dowling makes it clear how this maps out for the pedagogic practice of mathematics, giving an example of ‘Solve for x : $18x + 92 = 137$ ’ which works with both the specialised abstract content of mathematics and its specialised mode of expression. Ensor and Galant (2005) suggest that Dowling’s work on domains of mathematical discourse is powerful for three reasons. First, it allows a discussion of variation of classification, secondly it highlights the role of apprenticeship and thirdly it provides a language to discuss the articulation between school mathematics and everyday mathematics.

For this study, the question is how easily and usefully Dowling’s model can be mapped onto the subject of history. Mathematics has both clearly mathematical content and a highly specialised language, and has a concern with the recruitment of everyday knowledge to induct learners into its specialisation. History content is specialised in that it is about the past, but subjects such as music, art, drama and literature also recruit content about the past. History is not as concerned with the relationship between itself and everyday knowledge in the way that mathematics appears to be. And how is the mode of expression specialised in history? There appear to be at least two ways of understanding what a strongly classified form of expression might be.

One way of understanding form of expression is the way in which history uses the language of time, chronology and explanations of cause and effect. Using the lens of socio linguistics, Martin (2007) argues that history is not a technical discipline, but one that borrows its terms from other fields. What is specific to history is chronology and the different ways in which historians construe time. Linking this to school

history, Coffin's description of the different kinds of genre that learners are required to write leads to an understanding of the form of expression in history as the kinds of history texts there are (ie recording, explaining and arguing). From this perspective, the signifier is the language of time, of chronology and explanation.

A second way of understanding form of expression in history is the procedures used by historians to read primary sources. The argument is that history is specialised because of its procedures, or the way in which historians interact with primary sources. From this perspective, the form of expression that is strongly classified and specialised for history is its mode of enquiry. The signifier for school history is thus the use of primary sources and learners' interaction with these as 'historians'¹. It will become clear that the signifier chosen by the FET history curriculum is the latter. It also becomes clear in the analysis of learner's assessment tasks, that the presence of this particular signifier does not in fact necessarily identify a particularly *historical* task.

Lee and Ashby (2001) who work within history education suggest that history has two dimensions: the substantive dimension is the content of history and procedural dimensions of history are concepts like historical evidence, cause and effect explanations, ideas about change. The procedural dimensions are 'not what history is about but they shape the way we go about doing history'. There is some overlap between the substantive dimensions and the signified and between the procedural dimensions and the signifier.

The interaction with Dowling's domains only emerged as this study progressed and represents a developing part of the work. I return in Chapter 4 to the key question about what exactly it is that specialises history, first as an academic endeavour in the field of production and then as a school subject. Particular parts of the discourse of history are selected from the field of production and relocated as a different discourse in the recontextualising field.

¹ Work by Leinhardt (1994) shows that historians understand their work as holistically encompassing a deep engagement with primary sources and the use of this evidence to construct a convincing case.

2.6 Recontextualising discourses

According to Bernstein, the process of recontextualising entails the principle of *de-location* (that is selecting a discourse or part of a discourse from the field of production where new knowledge is constructed) and a principle of *re-location* of that discourse as a discourse within the recontextualising field (2000, p.113). In this process of de- and re-location, the original discourse undergoes an ideological transformation. According to Lamnias, this process ‘presupposes intermediations and produces dilemmas’ (2002, p. 35). It is this transformation and these dilemmas that I am interested in describing with regards to the history curriculum reform in South Africa.

A different kind of recontextualization story is told by Bruno Latour (1999) who is interested in the classic question of the philosophy of science: how do we pack the world into words? In his book, *Pandora’s Hope* Latour tells the story of a group of scientists studying the Boa Vista forest in the Amazon region. They want to know if the savannah is advancing or the forest is advancing. Forests thrive in clay soil and the savannah thrives in sandy soil. Latour documents how the team, which includes pedologists (soil scientists) and botanists, maps out the region into a grid of Cartesian coordinates so they can find their way around it. Essentially the team is involved in the work of de-locating plants and soil from the forest and re-locating these at the university. The botanist gathers specimens of plants, which will be classified and sent back to the university. We will be able to go from her written report to the names of the plants, from these names to the dried and classified specimens. A cabinet of cubby holes contains the dried specimens between newspaper, but classified and organized. The pedologists take soil samples that are stored in a special wooden box, and taken back to the university to be analysed. Latour asks to what extent these soil and plant samples represent the forest:

So are we far from or near to the forest? Near since one finds it here in the collection. The *entire* forest? No. Neither ants nor trapdoor spiders, nor trees, nor soil, nor worms, nor the howler monkeys ...are in attendance. Only those few specimens and representatives that are of interest to the botanist have made it into the collection. So are we, therefore, far from the forest? Let us say we are in between, possessing all of it through these delegates, as if Congress held the entire United States; a very economical metonymy in science as in

politics, by which a tiny part allows the grasping of the immense whole (Latour, 1999, p. 36).

2.7 The pedagogic device

The question posed by Bernstein is: are there any general principles underlying the transformation of knowledge into pedagogic communication? (1996, p. 39). Bernstein uses the term 'pedagogic device' to refer to systemic and institutionalized ways in which knowledge is recontextualised from the field of knowledge production into the school system and its distribution and evaluation within the schooling system (Jacklin, 2004, p. 28). The pedagogic device answers the question: 'how does a society circulate its various forms of knowledge and how is consciousness specialised in society's image?' (Maton & Muller, 2007, p. 18).

The pedagogic device is the condition for the production, reproduction and transformation of culture. The pedagogic device has internal rules which regulate the pedagogic communication which the device makes possible. Bernstein says that there are similarities between the pedagogic device and language device in that both make possible a great potential range of communicative outcomes (1996). The rules of both the language device and the pedagogic device are relatively stable and are not ideologically free. The crucial difference is that with the pedagogic device it is possible to have a form of communication, an outcome, which can subvert the fundamental rules of the device.

The device consists of three rules which give rise to three respective arenas containing agents with positions/ practices seeking domination (Bernstein & Solomon, 1999). The pedagogic device is the site of struggle, for the 'group who appropriates the device has access to a ruler and distributor of consciousness, identity and desire' (Ibid., p. 269). Symbolic control is materialized through the pedagogic device. The pedagogic device is a symbolic ruler, ruling consciousness, in the sense of having power over it, and ruling in the sense of measuring the legitimacy of the realisations of the consciousness (Bernstein, 2000).

The grammar of the pedagogic device consists of three interrelated and hierarchically organized rules: distributive rules, recontextualising rules and evaluative rules (Bernstein, 2000). These rules are hierarchically related in the sense that the recontextualising rules are derived from the distributive rules and the evaluative rules are derived from the recontextualising rules (Bernstein, 1996). The rules are in turn linked to fields: the distributive rule to the field of the production of discourse, the recontextualising rule to the recontextualising field and the evaluative rule to the field of reproduction. Pedagogic discourse underlies the three fields and is constituted through classification and framing and the recognition and realisation rules.

Table 2 : The arena of the pedagogic device (Maton and Muller, 2007, p. 18)

Field of practice	Production	Recontextualisation	Reproduction
Form of regulation	Distributive rules	Recontextualising rules	Evaluative rules
Kinds of symbolic structure	Knowledge structure	Curriculum	Pedagogy and evaluation
Principal types	Hierarchical and horizontal knowledge structures	Collection and integrated curriculum codes	Visible and invisible pedagogies
Typical agents	Academics, professional historians	Curriculum writers, teacher educators, textbook writers	Teachers
Typical sites	Research papers, conferences, laboratories	Curriculum policy, textbooks, learning aids	Classrooms and examinations (assessment tasks)

2.7.1 Distributive rules

The function of the distributive rules is to regulate the relationships between power, social groups, forms of consciousness and practice. Distributive rules specialize forms of knowledge, forms of consciousness and forms of practice to social groups. They establish who gets access to what knowledge, that is, to which privileged and specialised ways of classifying, ordering, thinking, speaking and behaving (Ensor, 2004). Distributive rules distinguish between two different classes of knowledge – the esoteric and mundane, the unthinkable and the thinkable. The line between these two classes of knowledge is relative in any given period. In modern society, the control of the unthinkable rests with the upper reaches of the educational system. ‘This does not

mean that the unthinkable cannot take place outside the educational system, but the major *control and management* of the unthinkable is carried out by the higher agencies of education. The thinkable is managed by secondary and primary school systems' (Bernstein, 1996, p. 43).

Bernstein links the way in which meaning is made in a society and the way in which 'what is thought', is regulated. Meaning can be made in a way where there is an *indirect* relation between meanings and a specific material base. If meanings have a direct relation to a material base, these meanings are wholly consumed by the context. These meanings are so embedded in the context that they have no reference outside that context. These meanings are not simply context dependent, they are necessarily context bound: and meanings which are context bound cannot unite anything other than themselves. They lack the power relation outside a context because they are totally consumed by that context (Bernstein, 1996).

On the other hand, meaning can be made where there is an *indirect* relation to a material base. If these meanings have an indirect relation to a specific material base, the meanings themselves create a gap or a space. If meanings are consumed by the context and wholly embedded in the context, there is no space. But if these meanings have an indirect relation to a specific material base, because they are indirect, there must be a gap – what Bernstein terms the *potential discursive gap*. It is the potential of alternative possibilities, for alternative realisations of the relation between the material and the immaterial. This potential gap or space is the site for the unthinkable, the site of the impossible, and this site can clearly be both beneficial and dangerous at the same time. It is the crucial site of the *yet to be thought* (Bernstein, 1996).

Any distribution of power will attempt to regulate the realisation of this potential. In 'simple' societies, this regulation is affected by the religious system. In more complex societies it is those who control the distributive rules who attempt to regulate this gap.

Power relations distribute the thinkable and the unthinkable and differentiate and stratify groups accomplished by the distributive rules. It should be possible to see that the distributive rules translate sociologically into the field of the *production of discourse*. This field is produced more and more today by the state itself. The

distributive rules mark and distribute who may transmit what to whom and under what conditions and they attempt to set the outer limits of legitimate discourse (Bernstein, 1990).

In terms of this study it is in the field of the production of discourse that we can ask: What is legitimate historical knowledge? It is in this field that the production of new historical knowledge may legitimately take place. And it is from the field of production that a selection is made of the parts of the discourse which will be re-located in the recontextualising field.

2.7.2 Recontextualising rules: pedagogic discourse

Recontextualising rules constitute specific pedagogic discourses. Pedagogic discourse is seen as a grammar which underlies the three fields of the pedagogic device, which are the field of production of the discourse, the recontextualising field and the reproduction field (Bernstein, 2000). As already discussed, pedagogic discourse is a rule that embeds two discourses: a discourse of skills of various kinds and their relations to each other (instructional), and rules that create social order (regulative). In Bernstein's view there are not two discourses, there is only one (1996).

Pedagogic discourse is a principle for the circulation and reordering of discourses. In the process of delocating a discourse (manual, mental, expressive), that is, taking a discourse from its original site of effectiveness and moving it to a pedagogic site, a gap or rather a space is created. As the discourse moves from its original site to its new positioning as pedagogic discourse, a transformation takes place. The transformation takes place because every time a discourse moves from one position to another, there is a space in which ideology can play (Bernstein, 1996).

What is the relationship between the unmediated disciplinary discourse in the field of production and the way in which it is recontextualised into a pedagogic discourse? Bernstein suggests that as pedagogic discourse appropriates various discourses, unmediated discourses are transformed into mediated, virtual or imaginary discourses. He gives the example of children doing woodwork at school. He says that a real

discourse called carpentry is transformed into an imaginary discourse called woodwork at school. Using the example of physics, Bernstein (1996) argues that as the discipline is appropriated by the recontextualising agents, it is no longer derived from the intrinsic logic of that specialised discourse. The recontextualising agents make a selection as to how school physics will be sequenced and paced, and how it will be related to other subjects. The rules that govern these selections are social facts, and as such are a function of the regulative discourse and not the instructional discourse. Thus Bernstein argues that it is the regulative discourse that provides the rules of the internal order of the instructional discourse.

However Muller (2007) argues on the basis of Bernstein's vertical and horizontal discourse paper that Bernstein came to the view, late in his career, that the instructional domain (which includes the selection, pacing and sequencing of knowledge) *does* have an internal determinative logic of its own, which cannot simply be reduced to subordination to the regulative order. Muller asks the question: Does knowledge structure constrain pedagogic structure, does it place any onus on the way that the 'what is to be learnt' is recontextualised? (2007, p. 79). If recontextualisation of the discipline severs any relation to it, then how are specialised knowledges ever reproduced? There must be some relationship, some precursor between school knowledge, university knowledge and the field of production. The ways in which school history as an 'imaginary' discourse is recontextualised from a real discourse practised by historians is explored further in Chapter 4 on the nature of the discipline of history and the way in which it is recontextualised.

Pedagogic discourse is a recontextualising principle. The recontextualising principle creates recontextualising fields; it creates agents with contextualizing functions. The recontextualising field is key in creating the fundamental autonomy of education. Bernstein distinguishes between an official recontextualising field (ORF) created and dominated by the state and its selected ministries and agents, and a pedagogic recontextualising field (PRF). The PRF is made up of teacher trainers in colleges and university departments of education, specialised journals, private research foundations and textbook writers. If the actors in the PRF can have an effect on pedagogic discourse independently of the ORF, then there is some autonomy and struggle over pedagogic discourse and its practices. The relative independence of the PRF from the

ORF is important. The relationship between the ORF and PRF can vary across countries and within the same country over time. Sometimes the PRF can become a space where agents can develop curricula and pedagogy with some degree of independence of the ORF, in other cases the ORF significantly constrains the ability of the PRF to function (Ensor, 2004). Part of the work of this study is to explore the ways in which teacher trainers, textbook writers and teachers work with and change the pedagogic discourse set out by the state and its agents through the history curriculum.

Curriculum documents are recontextualised in the official recontextualising field (ORF) and represent the official texts elaborated by the Ministry of Education (an agency of the ORF) (Morais, Neves, & Fontinhas, 1999). The curriculum documents are further recontextualised in the pedagogic recontextualising field (PRF) as they are interpreted by teacher trainers in universities and in training workshops organised by the provincial departments of education as well as by textbook writers.

The recontextualising principle not only selects the *what* but also the *how* of the theory of instruction. The form of pedagogic discourse is constituted through classification and framing. According to Bernstein (1996), which pedagogic discourse is appropriated in classrooms depends more and more today upon the dominant ideology in the official recontextualising field (ORF) and upon the relative autonomy of the pedagogic recontextualising field (PRF). That is to say, the pedagogic discourse depends on what the state says teachers should do and what education should look like, and upon the relative autonomy that teachers have to embrace or reject the state's vision. The concepts of the ORF and PRF within the pedagogic device will be explained in the following section.

2.7.3 Evaluative rules

The evaluative rules are linked to the field of reproduction within the pedagogic device. Bernstein constructs pedagogic *discourse* as instructional discourse embedded in regulative discourse. Pedagogic discourse is then translated into a pedagogic

practice within school classrooms. It is in the field of reproduction that pedagogic practice is regulated at the classroom level.

The key to pedagogic practice is continuous evaluation. For Bernstein, evaluation condenses the meaning of the whole pedagogic device. The purpose of the device is to provide a symbolic ruler for consciousness. Bernstein makes the links here with the religious origins of the device, as religion was the fundamental system for both creating and controlling the unthinkable. He says that the religious field is made up the prophets, the priests and the laity, and the rule is that you can only occupy one category at a time. He then uses these categories as analogies for the structure of the pedagogic field, where the ‘prophets’ are the producers of knowledge, the ‘priests’ are the recontextualisers and the ‘laity’ are the acquirers. (Bernstein, 1996, p. 50). The essence of the teaching relation is to evaluate the competence of the acquirer (Bernstein, 1990).

We have already seen how a range of research studies support the premise that making the evaluative criteria explicit was one of the most crucial pedagogic practices to promote higher levels of learning for all students. Reeves’ (2005) PhD study of low socio-economic Grade 6 mathematics classrooms in the Western Cape also found that strong framing over the evaluation criteria improves achievement gain when modelling only the ‘type of pedagogy’ variables. However in the model which combined ‘type of pedagogy’ and opportunity to learn it was the cognitive level of the teacher’s expositions and feedback on error that was a discriminating factor in relation to achievement gain (p. 224).

The relations between the rules and the fields of the pedagogic device, and how these relate to the present study are shown in the figure below.

Figure 1: The pedagogic device and this study (adapted from Bernstein, 2000 and Maton and Muller, 2007)

(Form of regulation) Field of practice	Processes	Typical agents	This study
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Academics,	Knowledge structure and procedures of history (Chap 4).
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum writers	Processes of making the History NCS (Chap 5). An analysis of the changes in the history curriculum (1996 and 2003) (Chap 6).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.	Teacher trainers and writers of textbooks.	A description of a provincial teacher-training workshop and a description of how selected textbook writers and publishers understand their work (Chap 7).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Teachers	An analysis of pedagogic practice in three Grade 10 history classrooms in 2005 and 2006 (Chap 8). An analysis of assessment tasks (Chap 9). Teachers' perceptions of the new curriculum (Chap 10)

2.7.4 The limits of the pedagogic device

Bernstein (1996) was clear that the pedagogic device is not deterministic in its consequences. The first reason for this is internal to the device. It is in the process of controlling the unthinkable that it makes the possibility of the unthinkable available. The second reason is that the device creates an arena of struggle between different groups for the appropriation of the device, because whoever appropriates the device has the power to regulate consciousness. The empirical reality is surely that there is not one group of people who appropriate the 'device' but rather that different groups

may appropriate different fields of the device, depending on the relative autonomy of the actors within each field.

2.8 The structure of knowledge

2.8.1 Horizontal and vertical discourse

Maton and Muller (2007) show how Bernstein's theoretical thinking developed from pedagogic code to pedagogic discourse to knowledge in the latter part of his life and career. In looking for ways in which to theorise the structures of knowledge, Bernstein (1999) offers a distinction between two forms of discourse: horizontal and vertical. Horizontal discourse is everyday or common-sense knowledge, which is concrete and context-dependent, and vertical discourse is abstract and context-independent. The academic discipline of history would fall with the vertical discourse, in that it is the discourse of formal education, rather than common-sense knowledge.

2.8.2 Hierarchical and horizontal knowledge structures

Within the vertical discourse (or the discourse of formal education), Bernstein makes a further distinction between two kinds of knowledge structures: *hierarchical knowledge structure* or a *horizontal knowledge structure*. Hierarchical or vertical knowledge structures are those that depend on a previous knowledge base before proceeding up the hierarchy of understanding. Theory develops through integration, towards ever more integrative or general propositions.

A hierarchical knowledge structure appears to be motivated towards greater and greater integrating propositions, operating at more and more abstract levels (Bernstein, 1999). For example, in physics, scientists are working towards the ultimate law that explains the universe. Development of the discipline is seen as the development of theory that is more integrating, more general than the previous theory. Writing more than three decades ago about the nature of disciplines for teaching, Phenix (1971) makes the point that a good discipline is one that simplifies

understanding or uses analytic abstraction to ease comprehension and reduce complexity. Since history does not do this, he would not consider it a good discipline, although he does concede that there are degrees of discipline. Bernstein's concepts of hierarchical and horizontal knowledge structures give a way of describing these degrees of discipline.

In contrast to vertical knowledge structures, which focus on integrating propositions, Bernstein (1999) suggests that a horizontal knowledge structure consists of a series of specialized languages with specialized modes of interrogation and criteria for the construction and circulation of texts. Horizontal knowledge structures consist rather of a series of parallel incommensurable languages (Muller, 2006). History would be seen as a horizontal knowledge structure. Its specialty comes from its mode of interrogation and the criteria for the construction of historical texts, rather than a search for a theory that encompasses all others. Martin (2007) suggests that history would be characterized as a horizontal knowledge structure because it is not hierarchically organized and learning new knowledge does not rely on previous knowledge.

Horizontal knowledge structures consist of a series of specialized languages. In the case of English literature, the languages would be the specialized languages of criticism. In Sociology, the languages refer to functionalism, post-structuralism, post modernism, Marxism, etc (Bernstein, 1999). Each of these languages make different and opposing assumptions, and have their own criteria for what counts as evidence and what counts a legitimate questions. In History, these languages would be different historiographies, such as a modernist perspective which works towards a grand narrative, a Marxist perspective which takes the economy and economic relations as the base, a post-colonial perspective² etc.

Development of the discipline in a horizontal knowledge structure cannot be seen as the development of theory that is more integrating, more general than the previous

² Martin (2007) shows how language works differently in the different history 'languages', with modernist history nominalising activity and Marxist doing the same but technalising these abstractions, as it draws on terms from Marxist economics and political thought (pp. 48, 49).

theory, as in hierarchical knowledge structures. So what counts as development in the discipline? Bernstein argues that what counts as development in a horizontal knowledge structure is the development of a new language that offers the possibility of a fresh perspective, a new set of questions, a new set of connections. In the discipline of history, an example of a new language might be social history which emerged in the 1960s and 70s asking questions about ordinary people and their perspectives as opposed to political history which focuses on macro changes in political, constitutional and legal systems.

2.8.3 Strong and weak grammars

Bernstein (1999) makes a further distinction in his typology of horizontal knowledge structures – that of strong and weak grammars. He argues that some horizontal knowledge structures have an explicit conceptual syntax capable of ‘relatively’ precise empirical descriptions and/or generating formal modelling of empirical relations. He calls these strong grammars and those that have weaker powers for empirical descriptions, weak grammars. Mathematics and logic would have the strongest grammar; economics, linguistics and parts of psychology would have strong grammar, while sociology, cultural studies and social anthropology would have weak grammar.

Problems of acquisition arise in a discipline where the grammar is weak. For example, asks Bernstein, how do acquirers know that they are really writing sociology? Making use of the canonical names is one way, and these names will become associated with particular languages. Bernstein points out that the choice of which sociological language to write reveals something about the social basis of the choice. Maton (2006; 2007) builds on this even further, saying that the acquisition of the horizontal knowledge structures depends much more on *who you are* than on *what you know*. He argues that the humanities have a hierarchical knower structure which focuses far more on the habitus and disposition of the ideal knower, than on the knowledge he³

³ I use ‘he’ because in Britain the ideal humanist intellectual was a gentleman who pursued his studies for the ‘love of it’. A classical education served as shorthand for these dispositions. But to have a classical education was in the main to have enjoyed a particular social and educational trajectory – typically male, high social class, private school, Oxbridge (Maton 2007, p. 91).

knows. He contrasts this to science which has a hierarchical knowledge structure and a horizontal knower structure. He argues that the acquisition of hierarchical knowledge structures, like science, is in fact more democratic, because anyone can learn the rules, the laws and the formulae. In other words, it's easier to change what you know than who you are.

2.9 Analysing 'what is relayed'

It has already been mentioned that Bernstein's method distinguishes between two qualitatively different languages in theory and research. There is a language *internal* to the theory and then there is a language that describes the things outside the theory within the field it investigates, an *external* language of description (Moore, 2004). The external language of description must be both able to describe what is outside the theory in terms relevant to the theory and must be capable of recognizing what is beyond the theory.

Bernstein's concepts enable us to describe pedagogic discourse and pedagogic practice in detail as the concepts are designed to describe the relay of the pedagogic message. However, they cannot give us a description of the quality of the message that is relayed (Hugo, Bertram, Green, & Naidoo, 2008)⁴. There were qualitatively different things happening in the different history classrooms that were not adequately captured by the concepts of classification and framing. One of the areas appeared to be that of cognitive demand. With regard to assessment, for example, Bernstein is concerned with how explicit the evaluative criteria are, and not about the cognitive demand of these criteria. It was simply not possible to use Bernstein's concepts to analyse the cognitive dimension of assessment tasks, as these concepts were never designed for this kind of analytic task. Other concepts are needed to speak to the depth of the cognitive demand in either assessment or in teaching.

Other researchers who have operationalised Bernstein's work for empirical classroom work have described cognitive demand in different ways. Neves and Morais (2001)

⁴ I do not go into detail here, but this article analyses the ways in which colleagues and I worked with Bernstein and Bloom to find ways to describe the quality of the message relayed.

who analyse the science curriculum documents in Portugal, deal with cognitive demand using categories like complex/ simple socio-affective competences and complex/simple cognitive competencies. In her analysis of Grade 3 classrooms, Hoadley (2005) used a continuum of conceptual demand from high to low, where high conceptual demand involves application, synthesis and/or evaluation of knowledge and a low level of conceptual demand involves mostly recall and memorisation. Reeves (2005) studied Grade 6 Mathematics classrooms. She also developed a continuum of five categories. The categories are described as follows: (1) having no or very low cognitive demand; (2) having some conceptual knowledge of mathematics; (3) requiring some procedural knowledge of mathematics; (4) requiring procedural and some principled knowledge of mathematics; and finally level (5) requiring both principled and procedural mathematics knowledge. The hierarchy moves from conceptual to procedural to principled mathematics knowledge.

2.10 Bloom's Revised Taxonomy

An analysis tool that did work in this study to describe the complexity and quality of the cognitive demand both in lessons and in assessment tasks is Bloom's Revised Taxonomy⁵. Although Bloom and Bernstein might seem theoretically miles apart, Bloom being a psychologist and Bernstein a sociologist, both were concerned with the issue of social justice and the education system. In a book called *Compensatory education for cultural deprivation*, Bloom, Davis and Hess (1965) report on a research conference of the same name. The book summarises what is known about the problem of education and cultural deprivation and suggests critical problems for further research. Bernstein's (1961) early work on social class and linguistic development is listed in the book's annotated bibliography of research studies relevant to the area.

Bloom's 1965 taxonomy for the cognitive domain has long been used in teacher education and teaching method books (Jacobsen, Eggen, Kauchak, & Dulaney, 1985). There are a wide range of frameworks and taxonomies of thinking skills that have

⁵ Interestingly, a Norwegian PhD student is also employing both Bernstein and Bloom as a tool of analysis (Haugen, 2006)

been developed since the 1950s. A handbook called *Frameworks for Thinking* (Moseley et al., 2005) summarises and evaluates a range of these models or systematic approaches which attempt to describe aspects of thinking. It places Bloom's Revised Taxonomy within the category of frameworks dealing with instructional design.

The revised version of Bloom's taxonomy developed by Anderson et al. (2001) provides a useful analytical tool to identify forms of knowledge complexity and cognitive process complexity within the lessons and the assessment tasks. The original taxonomy had not sufficiently separated the knowledge and cognitive process dimensions. Bloom's taxonomy had conflated these dimensions into a one dimensional representation of six levels of increasing cognitive complexity: knowledge, comprehension, application, analysis, synthesis and evaluation. Within the revised model the knowledge dimension is described as consisting of several levels, each level representing a different and increasingly complex form of knowledge. Likewise the process dimension also consists of several levels, each level representing more demanding and complex cognitive processes. This has resulted in the creation of a two-dimensional classificatory tool which can be used to categorise and describe the kinds of knowledge learners work with (knowledge dimension), *together* with the ways in which learners work with the knowledge (cognitive process dimension).

Like the original taxonomy, the revised taxonomy is assumed to have a loosely hierarchical nature, in that a more advanced level subsumes the levels below. For example, it can be assumed that a person operating at the application level has mastered the cognitive demands required for working at the knowledge and comprehension level.

The main levels in the knowledge dimension are (Krathwohl, 2002, p. 214):

Factual knowledge – The basic elements that students must know to be acquainted with a discipline or solve problems in it.

Aa. Knowledge of terminology

Ab. Knowledge of specific details and elements

Conceptual knowledge – The interrelationships among the basic elements within a larger structure that enable them to function together.

- Ba. Knowledge of classifications and categories
- Bb. Knowledge of principles and generalisations
- Bc. Knowledge of theories, models and structures

Procedural knowledge – How to do something, methods of enquiry, and criteria for using skills, algorithms, techniques, and methods.

- Ca. Knowledge of subject-specific skills and algorithms
- Cb. Knowledge of subject-specific techniques and methods
- Cc. Knowledge of criteria for determining when to use appropriate procedures

Metacognitive knowledge – Knowledge of cognition in general as well as awareness and knowledge of one's own cognition.

- Da. Strategic knowledge
- Db. Knowledge about cognitive tasks, including appropriate contextual and conditional knowledge
- Dc. Self-knowledge

The main levels in the cognitive process dimension are (Krathwohl, 2002, p. 215):

Remember – Retrieving relevant knowledge from long-term memory

- 1.1 Recognising
- 1.2 Recalling

Understand – Determining the meaning of instructional messages, including oral, written and graphic communication.

- 2.1 Interpreting
- 2.2 Exemplifying
- 2.3 Classifying
- 2.4 Summarising
- 2.5 Inferring
- 2.6 Comparing
- 2.7 Explaining

Apply – Carrying out or using a procedure in a given situation.

- 3.1 Executing
- 3.2 Implementing

Analyze – Breaking material into its constituent parts and detecting how the parts relate to one another and to an overall structure or purpose.

- 4.1 Differentiating
- 4.2 Organising
- 4.3 Attributing

Evaluate – making judgements based on criteria and standards.

- 5.1 Checking
- 5.2 Critiquing

Create – Putting elements together to form a novel, coherent whole or making an original product.

- 6.1 Generating
- 6.2 Planning
- 6.3 Producing

Each main level has a number of sub-levels associated with it, which make for finer distinctions of knowledge and process within the level. For the purposes of this study, I worked only with the main levels. Presenting these levels on a table in a grid fashion creates a number of intersecting cells, which make up what is known as a taxonomy table.

Table 3: The taxonomy table

The knowledge dimension	The Process dimension						
		1. Remember	2. Understand	3. Apply	4. Analyse	5. Evaluate	6. Create
	A: Factual knowledge						
	B: Conceptual knowledge						
	C: Procedural knowledge						
	D: Metacognitive knowledge						

Unlike Bernstein’s classification and framing rubrics that enabled an analysis of the different types and components of pedagogy, this table provides clear criteria for recognizing qualitative levels of cognitive demand and knowledge complexity within the various lessons and assessment tasks.

Bloom’s Revised taxonomy provides a very explicit external language of description which is to say that it provides a basis for establishing what are to count as data and provides for their principled reading (Ensor & Hoadley, 2004).

2.10.1 Limitations of using Bloom

Bloom is a generic tool designed for working with a range of different levels of education and across a range of subjects. It was useful up to a point, but was not able

to penetrate the specificity of history, particularly in differentiating between skills or procedures and knowledge. As the study progressed it became clear that issues around the structure of school history knowledge were becoming increasingly key. It became clear that the next steps of analysis should incorporate the work of the functional linguists, but that this was beyond the scope of this particular thesis.

Hoadley's study (2005) also found that Bernstein's concepts were not helpful in describing what was relayed in the classroom. She made use of Dowling's concepts of domains and strategies to provide the semantic content of what is classified. I initially did not turn to Dowling as his work is in mathematics, and felt that Bloom would be a sufficient tool. However, at the end of the study it became clearer that Dowling's concepts of domains are useful in describing the speciality of history from a content perspective (the signified) and in terms of mode of expression (the signifier). As with the work of the functional linguists, it was beyond the scope of this study to work with Dowling in a very detailed way. I have, however, indicated earlier what an analysis using Dowling might look like within History.

2.11 Conclusion

The focus of this study was to track the recontextualisation of the high school history curriculum through the fields of the pedagogic device. The boundary of the study was drawn around a broad context, with the emphasis on tracking across time and within different recontextualising spaces, rather than excavating any of the fields in considerable depth. The study generated a range of data from the different fields, and it was tempting, in particular with the classroom data, to move to more and more detailed levels of analysis, using different theoretical tools of analysis (such as those from Dowling and the socio linguists). However, this kind of analytic work must wait and is not included in this study.

This chapter has described Bernstein's internal language of description, which acts as a theoretical frame for the study. I have described Bernstein's concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal

knowledge structures. Chapter 3 on methodology describes how these concepts have been translated into an external language of description which can read the data.

Chapter 3

Research methodology

3.1 Introduction

In this chapter I consider the issues of research design, data collection and data analysis. The first part of the chapter describes the questions of ontology, epistemology and methodology that underpin the study with a specific focus on the case study. The second part deals with the data sources and the data collection methods. Data were collected from a number of different sources: curriculum documents were analysed, the writers of the FET history curriculum document were interviewed, writers and publishers of Grade 10 textbooks were interviewed, three history teachers were observed teaching five consecutive Grade 10 history lessons in both 2005 and 2006, these teachers were interviewed, assessment tasks and learners' portfolio tasks were collected for 2005 and 2006 and small groups of Grade 10 history learners were interviewed. Finally the chapter describes the different analytic tools that were used to analyse the various sets of data.

3.2 Broad orientation of the study

Much of the discussion in the social sciences over the past two decades has been about the differences between qualitative and quantitative research. The terms qualitative and quantitative are used both to describe a general approach to research (or a paradigm) and to describe the specific methods of data collection (Morgan, 2007, van der Mescht 2002). Morgan suggests that it was Michael Patton who first tabulated the differences between Quantitative and Qualitative Research in 1975. He uses capitals for these terms when they describe paradigms, rather than specific methods. Using the terms to describe a general approach to research, Winter (2000)

writes that quantitative research limits itself to what can be measured or quantified while qualitative research tries to capture the unquantifiable, personal, in-depth, descriptive and social aspects of the world. Despite the title of the edited collection in which they are writing (*Sage Handbook of Qualitative Research*) which uses the term as a general approach to research, Guba and Lincoln's (1994, p. 105) position is that the term qualitative should be reserved as a description of types of methods rather than as a description of a research paradigm. However the terms continue to be used in both ways in the literature.

Guba and Lincoln (1994) have been influential in describing different inquiry paradigms in qualitative inquiry. They describe a number of research paradigms which operate in the social sciences and argue that an inquirer working within one of the paradigms must show congruence between the ontological question (What is the form and nature of reality?), the epistemological question (What is the nature of the relationship between the knower and the what can be known?) and the methodological question (How can the inquirer go about finding out the nature of the 'reality'?). Guba and Lincoln set up a strong metaphysical paradigm that strongly linked ontological beliefs, epistemology and methodology. They say that the answers to the ontological question, the epistemological question and the methodological question 'are interconnected in such a way that the answer given to any one question, taken in any order, constrains how the others may be answered' (1994, p. 108).

In contrast to this metaphysical paradigm, Morgan (2007) suggests a pragmatic approach which separates the more metaphysical aspects of ontology from epistemological and methodological issues. His pragmatic approach rejects the top-down privileging of ontological assumptions and rather focuses on the methodology as the area that connects issues at the abstract level of epistemology and the mechanical level of actual methods. He also suggests that a pragmatic approach adds another option to the established Quantitative and Qualitative Research divide. He argues that the pragmatic approach can rely on a version of abductive reasoning that moves back between induction and deduction. It also overcomes the incommensurability between a 'subjective' researcher and an 'objective' researcher. Rather one can assert both that there is a single 'real world' and that all individuals have their own unique interpretations of that world (2007, p. 71). It follows then that

both qualitative and quantitative methods may be used appropriately within any research paradigm.

My approach in this study is that a researcher's beliefs about ontology, epistemology and methodology that underpin and inform any inquiry need to be made explicit. However, I do not think that there is necessarily a strict congruence between the answers to these three questions in the way that is set out in various paradigms by Guba and Lincoln (1994). Their attempt to draw clear distinctions between the beliefs within various inquiry paradigms is helpful in that it provides us with a way to organize ideas, but it is, as they acknowledge, merely their own human construction. Which, as Morgan (2007) comments, seems to shift every few years as another 'paradigm' is added (Guba & Lincoln, 2005).

My belief about the nature of reality might be labelled critical realism, where reality is assumed to exist, but can only be imperfectly understood (Lincoln & Guba, 1994). According to Moore (2004, p. 149) who writes from the perspective of sociology of knowledge, critical realism treats knowledge as social and seeks the conditions for truth not in abstract forms of logic but in the material conditions under which it is produced. He suggests that critical realism gives a third way between the two extremes of absolutism and relativism. Critical realism focuses on the social relations of the production of knowledge.

In terms of the epistemological question about the nature of the relationship between the knower and what can be known, I take an intersubjective approach which acknowledges that it is not possible for the researcher to be completely objective nor to be completely subjective (Morgan, 2007, p. 71). In Morgan's pragmatic approach there is no problem to assert both that there is a single 'real world' (critical realism) and that all individuals have their own unique interpretations of that world. My stance is closer to the subjectivist end of the continuum, where the values and habitus of the researcher will influence the inquiry. This perspective falls within Guba and Lincoln's label of 'critical theory and related ideological positions' (2004, p. 110).

The methodological question is how can the inquirer go about finding out whatever she believes can be known? My study describes the process of curriculum

recontextualisation at a particular point in South Africa's history; its purpose is not to test a hypothesis. It is searching for happenings rather than for causes and focuses on understanding complex interrelationships, rather than explanation and control. In order to do so, I rely largely on qualitative data, which is analysed in both inductive and deductive ways according to what needs to be described. I prefer to use the concepts qualitative and quantitative to refer to types of data and the ways in which these data are analysed. The approach or style of the inquiry is a case study.

3.2.1 The study as a case study

In his review of the literature on cases studies, Bassey (1999) suggests that there is no easy answer to the question 'what is case study?'. He starts his review with an invitational conference held at Cambridge in the late 1970s on 'methods of case study in educational research and evaluation'. Helen Simons edited a book of the conference contributions, which was entitled *Towards a Science of the Singular* (1980). Since then case study has been described in various ways. At a basic level, the case study is a generic term for the investigation of an individual, group or phenomenon. The understanding is that human systems have a particular wholeness or integrity and that it is important to do an in-depth investigation of the relationships between the parts and the patterns that emerge (Bassey, 1999).

Robert Yin's understanding of case studies tends towards the scientific paradigm. He defines a case study as an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident (Yin, 1994). Stake's perspective on the case study is more interpretive. He writes 'Case study is the study of the particularity and complexity of a single case, coming to understand its activity within important circumstances' (1995). According to Stake, case study is not a methodological choice, but a choice of object to be studied (1994, p. 236).

Bassey's own formulation of an educational case study is as follows:

An empirical enquiry which is conducted within a localized boundary of space and time (ie. a singularity); into interesting aspects of an educational activity, or programme, or institution, or system; mainly in its natural context

and within an ethic of respect for persons; in order to inform the judgments and decisions of practitioners or policy-makers; or of theoreticians who are working to these ends (1999, p. 58).

In this inquiry, the object or phenomena to be studied is the recontextualisation of the history curriculum in South Africa at a particular point in time. The object of study is the process of curriculum reform. Stake (1994, p. 236) quotes Louis Smith (1978) that the case is a 'bounded system'. He argues that the more the object of the study is a specific, unique and bounded system, the greater the usefulness of the epistemological rationale he describes. However, in this inquiry, there is not always a clear boundary between the phenomenon and the context. Rather the recontextualisation of the curriculum is inextricably bound up in its context. But the case study is conducted within a localized boundary of space and time. The space is quite disparate, as it tracks the recontextualisation of the history curriculum which occurs at a range of different levels such as the writing of the curriculum document, the training of teachers and the implementation in school classrooms. The time boundaries are clearer, with the case study focusing on the training of teachers in 2005 and the implementation in classrooms in 2006.

There are a number of different kinds of case studies that have different purposes. Stake differentiates between an intrinsic case study where the purpose is to better understand a particular case for its own sake and an instrumental case study where a particular case is examined to provide insight into an issue or to refine a theory (1994). The purpose of the instrumental case study is to understand something else (1995). This inquiry is an instrumental case study, because the recontextualisation of the history curriculum is not of intrinsic interest in itself but is of interest because of the theoretical and methodological understanding and insight this particular case can generate about curriculum recontextualization in a particular context. In other words, the study could have been about the recontextualisation of the science curriculum, or the geography curriculum.

Bassey (1999) describes three types of educational case study. Theory-seeking and theory-testing case studies are particular studies of general issues that lead to fuzzy propositions or fuzzy generalizations and conveying these, their context and the evidence leading to them to interested audiences. Story-telling and picture-drawing

case studies are narrative stories and descriptive accounts of educational events, projects, programmes, institutions or systems which deserve to be told to interested audiences, after careful analysis. Evaluative case studies are enquiries into educational events, projects or programmes to determine their worthwhileness, as judged by analysis by researchers. I would describe my study as the first type, a theory-seeking and theory-testing case study in that I am using Bernstein's concept of the pedagogical device (which is described in the theoretical chapter) as a way of framing the case study. In part the study is concerned with the usefulness of this concept for analyzing curriculum recontextualisation. Some parts of the study, such as the description of the teacher training workshop for history teachers are narratives and are presented as a descriptive account.

3.2.2 Validity/ trustworthiness

Validity is a highly debated topic in educational and social research, and there is not one universally accepted definition of the term. The term comes from the natural sciences and experimental research. Within this tradition, it is essentially about accuracy or 'are we measuring what we think we are?' (Winter, 2000). In experimental research, internal validity is concerned with the relationships between cause and effect and whether the findings or results of the research relate to and are caused by the phenomena under investigation and not other unaccounted for influences. External validity is concerned with the extent that the findings may be generalized to other contexts.

Many qualitative researchers (such as Wolcott, 1994; Bassey, 1999; Winter, 2000) argue that the term validity is not applicable to qualitative research. Measurement and cause and effect relationships are not an issue for qualitative approaches like case studies, ethnography or life history where the aim is to describe and not to 'measure'. These styles of research are concerned with the meanings and personal experiences of individuals and groups.

With regard to external validity, it is usually understood that the purpose of a case study is not to produce 'generalisable results'. Stake writes that the 'real business of case study is particularization, not generalization.' (1995, p. 8). However Bassey

(1999, p. 12) suggests that there is some value in what he has come to call ‘fuzzy generalization’ in theory-seeking case studies. This is a statement that makes no *absolute* claim to knowledge but carries an element of uncertainty. It reports that something has happened in one place and that it may happen elsewhere. Bassey maintains that ‘the fuzzy generalization arises from studies of singularities and typically claims that *it is possible, or likely, or unlikely that* what was found in the singularity will be found in similar situations elsewhere: it is a qualitative measure’ (p. 12).

While the definitions of validity as applied to experimental and survey research are not useful for case studies and other qualitative approaches, there is still a need for some kind of qualifying check that answers the question: How do we know that the research is ‘worthwhile’ and is an adequate re-representation of the social representations that have been studied? Different terms have been adopted by different authors, such as ‘trustworthiness’, ‘worthy’, ‘relevant’, ‘plausible’, ‘confirmable’, ‘credible’ or ‘representative’ (Winter 2000, p. 7).

Bassey (1999, p. 75) uses the concept of ‘trustworthiness’ which was coined by Lincoln and Guba (1985) and lists a number of questions that need to be asked at different stages of the research process. Things that enhance the trustworthiness of a study are prolonged engagement with the data sources, persistent observation of emerging issues, adequate checking of raw data with their sources, sufficient triangulation of raw data, systematically testing the emerging story against the analytical statements, using a critical friend to challenge the findings, giving sufficient detail in the account of the research and providing a adequate audit trail (Bassey, 1999).

Munby (2003) suggests that the concept of rigour is one which enables us to move away from ‘overworked paradigm wars and from the ambiguity of reliability and validity’ (p. 53). He suggests that rigour is about argument and process and quotes Mischler (1990) as arguing that the process of validation is far more important than validity. He describes validation as the social construction of a discourse through

which the results of a study come to be viewed as trustworthy for other investigators to accept and rely upon in their own work.

An ethnographer such as Wolcott dismisses the concept of validity as unhelpful, but is concerned with ‘not getting it all wrong’ (Wolcott, 1994), by taking accurate field notes, reporting fully, being honest, seeking feedback and allowing readers to ‘see’ for themselves.

Maxwell (1992) describes a number of levels of validity in qualitative research. Descriptive validity is concerned with the accuracy of the descriptions and observations. Interpretive validity asks: How do you *know* what you see or hear? How do you know that your interpretation of an event or an utterance is the ‘right’ one? And lastly theoretical validity concerns itself with the constructions that researchers apply to, or develop, during research. Winter (2000) describes Maxwell’s typologies as being convenient and systematic, but critiques them for suggesting a false distinction between description, interpretation and theorization. Winter argues that interpretation is inherently part of what is described and observed, and that the researcher’s theoretical standpoint influences both data collection and interpretation.

In the positivist tradition, researchers attempt to enhance validity by separating themselves from the research as much as possible, whereas in qualitative approaches, researchers embrace their involvement and role within the research (Winter, 2000).

Trustworthiness and rigour are important at both the level of data collection and description, and at the level of data analysis. In this study, I have enhanced trustworthiness of data collection through mechanical means of recording interviews and lessons in classrooms. At the level of analysis, the tools of analysis used to interrogate the curriculum documents and the classroom lessons are coherent with the greater design of the research. Bernstein’s internal language of description gives rise to an external language of description that allows a dialogue with the data. The concept of languages of description has been explained in Chapter 2 and will be explored later in this chapter.

3.2.3 Ethical issues

The basic ethical principles which should underpin any research are autonomy, nonmaleficence and beneficence (Durrheim & Wassenaar, 2002). The autonomy of the participants needs to be respected, the research should do no harm, and there should be some benefit either directly to the participants or to other researchers or the society at large.

Different data collection methods require different ethical considerations, with perhaps observational research in the field being the most complex. Miles and Hubermann (1984) believe that fundamentally, field research is an act of betrayal, no matter how well intentioned or well integrated the researcher. Perhaps they mean by this that the researcher makes public things that are usually private. Perhaps this is most telling with regard to classroom practice and assessment which are seldom revealed to other adults. There does seem to be some betrayal in making the teaching and assessment practices of teachers visible and public. To minimise this, it was important that all participants in the study signed consent forms and agreed to take part. The data collected remains confidential and anonymous, in that schools and participants are referred to by pseudonyms.

Issues of power are perhaps most acute with field research. As I visited schools and classrooms, I was aware of the ever-present sense of power relations, as a person 'from the university', and particularly at Enthabeni, as a white person from the university. I was the one asking the questions, wielding the video camera, asking for copies of learners' work and 'walking away with the tapes at the end of the interview' (Riddel, 1989). If teachers wanted to, they were able to see the video recordings of their lessons. Two of the teachers asked for copies of the DVDs.

I was perhaps the less powerful person when it came to the interviews with the curriculum writing committee. I was the person asking for the time of important people. I emailed the chapter that describes and analyses this interview data to all the respondents but received a reply from only one person who expressed satisfaction that she had been accurately represented.

Ethical clearance was received from the University after submitting a research proposal and samples of the data collection instruments (see Appendix A). I received permission from the KwaZulu-Natal provincial department of education to conduct the study in the three schools and from the relevant workshop facilitator to attend a training workshop for Grade 10 history teachers. I also got permission from the principals of the three schools and from the teachers to conduct the study. I promised that schools and participants would remain confidential. When interviewing learners, I asked them to take home a consent form to be signed by their parents or guardians, which explained the purpose of the interview.

However, ethics in research is much more than a technical form to be completed with institutional checklists. It is essentially about personal integrity and social responsibility. I was constantly aware that I was in the school and the classroom due to the teachers' generosity, and I tried to be as accommodating as possible and not make undue demands on teachers' time without compromising the research purpose for being there.

3.3 Data collection methods

The following table represents the data collection strategies of the project. Data can be organized into three batches. The first batch is concerned with the curriculum documents and the writing thereof (the official recontextualising field), the second batch is concerned with the pedagogic recontextualising field and involves the provincial teacher training workshops and textbook publishers and the third batch was collected in three secondary schools (the field of reproduction). The following table describes the different data collection strategies as these are linked to the levels of the pedagogic device.

Table 4: Data collection strategies across the levels of the pedagogic device

Data collection strategy	Research participant(s)	Data collection instrument	Information sought	Data recording method
Official Recontextualising Field (ORF): <i>Curriculum documents</i>				
Curriculum document analysis	Curriculum document	Not applicable	Classification and framing relationships, conceptual demand	Not applicable
Semi-structured interview	Members of the Curriculum Working group	Interview schedule	Understanding of the process of curriculum development	Audio-recording
Pedagogic Recontextualising Field (PRF): <i>Provincial teacher training workshop and textbook publishers</i>				
Survey	Teachers attending FET workshop	Questionnaire	Perceptions of training, level of qualifications	Participants' recording
Participant observation	Facilitator and teachers attending the provincial FET History training	Field notes	Process of training	Field notes
Semi-structured interviews	Textbook publishers and writers	Interview schedule	Process of interpreting the curriculum documents, constraints.	Audio-recording
Field of reproduction: <i>School case studies</i>				
Classroom observation	Teachers	Video recording	Pedagogical practices	Video-recording
Structured group interview	Grade 10 learners	Interview schedule	Perceptions of history as a subject, of learning history	Audio-recording
Semi-structured interviews	Teachers	Interview schedule	Biography, Perceptions of history as a subject, of learning history	Audio recording
Semi-structured interview	Principal	Interview schedule	Profile of the school	Field notes
Collection of assessment tasks/ tests	Assessment tasks	Not applicable	Levels of cognitive demand.	Assessment tasks

As can be seen in the above table, the study made use of a range of different data collection methods. These are described in greater detail below.

3.3.1. Curriculum documents

Two curriculum documents were analysed. These were the 1996 Senior Certificate Syllabus for History (Higher Grade) called the Interim Core Syllabus (ICS) and the 2003 National Curriculum Statement for History Grades 10 -12 (General) (NCS).

3.3.2 Interviews with curriculum writers

I interviewed six of the people who were part of the subject group who wrote the FET History curriculum document. These were all face-to-face interviews. The same semi-structured interview schedule was used in all the interviews. The schedule is found in Appendix A. Participants had access to the schedule prior to the interview. These generally lasted one to one and half hours and were audio recorded, and later transcribed. The interviews took place between August 2005 and March 2006, depending on the availability of the person. Most of these interviews took place in the office of the person being interviewed. Although the composition of the curriculum writing group is public knowledge, interviewees asked that specific comments not be linked to themselves directly.

3.3.3 Participant observation of provincial teacher training workshops

The method of data collection for the teacher development workshops was participant observation. I had arranged with the facilitator to attend the workshop and had also received permission from the Provincial Department of Education to attend. For the first two days of the workshop, the teachers at the workshop did not know that I was there as a researcher. On the third day, I asked that they complete a questionnaire for me, and introduced myself as coming from the University of KwaZulu-Natal. I took detailed field notes during the workshop.

The questionnaire (appendix I) asked teachers for information on how many years they had taught history, what their qualifications were and what their experience was of the curriculum training.

3.3.4 Interviews with textbook publishers

I interviewed a total of five people (writers and publishers) who were involved in the writing of Grade 10 history textbooks. In addition, one publisher completed the questions via email. The interviewees represented three different educational publishing houses in South Africa. Interviews took place in 2005, usually at the interviewee's place of work. The interviews were conducted using a semi-structured interview schedule (Appendix C). The interviews lasted between 60 and 90 minutes and were audio recorded and later transcribed.

3.3.5 School case studies

I collected data in three Grade 10 history classrooms in three co-educational high schools, which I call Enthabeni, Lincoln and North Hill. These names are pseudonyms. I will describe the sampling of these schools later. Data at schools were collected through classroom observation, the collection of learner assessment tasks and portfolios, field notes and interviews with teachers and selected learners.

Classroom observation

I spent at least one full day in each school during the first block of fieldwork. On this day, I followed the teacher for the whole day, observing all of the history classes that he or she taught. I also attended assembly at two of the schools. I then went to the school only to observe the Grade 10 history lesson for the next four days. I video recorded five consecutive history lessons in 2005 and then did so again in 2006. The purpose of the observation in 2005 was to get a sense of how teachers taught and assessed *before* the advent of the new curriculum that was implemented in January 2006.

Video recording means that I had detailed transcripts of the lesson that could be scrutinized by others. Observation often means that the actors will behave differently because of the observer (Brown & Dowling, 1998). At Lincoln, because there was space in the classroom, I sat at the back of the room, but at North Hill and Enthabeni I sat at the front of the room. The teachers had different perspectives about how my presence affected themselves and the learners. Mrs Lawrence at Lincoln said that the learners did not behave any differently when I was there. Mrs Naidoo at North Hill said that some were better behaved and more likely to participate in the lesson due to my presence, and Mr Mkhize at Enthabeni felt that some learners were shy and less likely to talk. Mrs Shandu at Enthabeni said that *she* was more restrained due to my presence. If I had not been there, there are times when she was so frustrated that she would have simply left the class and gone to the staff room as she often did, she said.

There are essentially two ways of doing classroom observation. The first is a qualitative, descriptive approach and the second is a quantitative approach through systematic classroom observation, where the researcher has a clearly defined idea of what she is looking for (for example, how the teacher asks questions). Systematic classroom observation is seen by many researchers to be a more reliable and objective measure of classroom behaviour (Hilberg, Waxman, & Tharp, 2004). I used a qualitative approach. I video recorded the lessons, transcribed the video and then coded the classroom episodes using the concepts of classification and framing. The advantage of having a video recording is that one is able to capture other qualitative issues that were not captured by the classification and framing analysis. It also means that others can watch the same video and bring other perspectives to the data.

Table 5: Dates when Grade 10 lessons were observed and video recorded

	Enthabeni	Lincoln	North Hill
2005	11 - 17 Oct	1 - 5 Aug	12 -15 Sept
2006	3 – 10 May	14 – 23 Aug	23 May – 2 June
TOTAL NO OF LESSONS	9	10	10

Field notes

I used between method triangulation (Delamont, 2002) to collect data from a number of sources while at the schools. In order to get a sense of the ethos of the school and a sense of staff understood the challenges and issues facing the school, I also attended assembly where possible, talked to the principal and to other teachers in the staff room. I wrote field notes of my impressions of the school while I was waiting for teachers and when I returned back to the office.

Semi- structured interviews

I interviewed each history teacher for about 30 – 45 minutes during each block of fieldwork. The first interview in 2005 focused on the teacher’s teaching biography, experience in teaching history and understanding of the purpose of teaching history (Appendix D). The second interview in 2006 focused on the teachers’ experience and understanding of implementing the new history curriculum (Appendix E). I planned to conduct a third and final interview with teachers at the end of 2007 to get their perspectives on the second year of teaching the Grade 10 curriculum, and to follow up and confirm any issues and interesting points that emerged from the data analysis. However, practical constraints meant that I could only interview Mrs Lawrence for a third time. All interviews were audio recorded and then transcribed.

I also interviewed at least two groups of learners (approximately eight learners per school) during each block of fieldwork. The learner interviews were conducted using a structured interview schedule, with a group of 4 or 5 learners. The interview schedule was designed to elicit learners’ perceptions of learning history and their

recognition of history as a discipline distinct from other subjects. The schedule is found in Appendix F. These interviews usually took place in an empty classroom or the library. At Lincoln, these took place during a study period, and at Enthabeni and North Hill the interviews took place during lesson time. Learners volunteered to take part in these interviews, and had to return a letter of consent signed by their guardian or parent in order to participate. The interviews were about 30 minutes in length. Given the wide range of data collected in the study, I chose not to include any analysis of the learner interviews in this thesis.

Assessment tasks

I collected worksheets/ resources used in the classes I observed and assessment portfolios from a sample of approximately five learners in each school in both 2005 and 2006. Class test papers and exam papers were collected.

3.3.6 Sampling of the three case study schools

The schools represent a purposive sample of three co-educational high schools in KwaZulu-Natal. Although more than ten years have passed since the previously racialised education departments were dissolved into a single national department of education, the legacy of apartheid remains, and the quality of education remains very uneven and unequal between schools. Learner achievement tests show that on average, South African children show remarkably low levels of competence in mathematics and reading⁶. Levels of competence vary, with children who are in schools regarded as affluent performing much better than all the rest (Soudien, 2007). While government funding has increased to poor and rural schools and reduced for previously white schools⁷, the latter charge high school fees to enable them to employ additional teachers and maintain resources. Black middle class families who can

⁶ This is using data from the Third International Mathematics and Science Study (TIMSS) which was carried out in 1994/5, the Southern and Eastern African Consortium for Monitoring Educational Quality (SACMEQ) tests which were carried out between 2000 and 2003, a national Grade 3 cohort analysis focusing on literacy and numeracy and attainment tests carried out in the Western Cape between 2002 and 2005 (Soudien, 2007). See also Fleisch 2007.

⁷ The national Department of Education pays the salaries of all teachers and funds public schools according to the quintile in which they fall, where the schools in the poorest quintile receive more funding than those in the 'least poor' quintile.

afford the fees are choosing these schools for their children due to their infrastructure and resources, English medium of instruction and the quality of education (de Klerk, 2002). Thus schooling in South Africa continues to offer very unequal learning opportunities, with approximately 20% of learners in ‘schools for the rich’, and 80% of learners in ‘schools for the poor’ (Fleisch, 2007).

The purpose in this study was to select three schools that represented the range of schools in terms of the education department that administered those pre- 1994 and the socio-economic status of the learners, using school fees as a proxy measurement of this. Each school represents a case study, and although may be representative of other similar schools, essentially can represent only themselves.

The selection of schools was opportunistic. I selected Lincoln as the ex-House of Assembly school because a colleague had suggested that the history Head of Department (HoD) there would be amenable to participating in a project like mine. I selected North Hill as the ex-House of Delegates school because I’d heard that the history Head of Department there was well-respected and was on the panel for setting the national Senior Certificate examination. When I visited the school, it turned out the HoD did not teach at Grade 10 level, but the teacher who did was willing to take part in my study. Enthabeni was selected as the rural, ex- Department of Education and Training school because a colleague knew the principal there and said that he would be willing to have University researchers in his school. When I visited the school, the history teacher was willing to participate in my study.

The design of the study included a sample of three schools in order to describe how the curriculum reform process was unfolding in each school. South African schools are differentiated so widely regarding socio-economic status of learners, geographic location of the school and resourcing, that it seemed important to attempt to capture learning and teaching in three different kinds of school. At the same time I recognize that these three schools do not capture all the variations in South African schools. The study does not include an ex- House of Representatives school, or an urban township school, or an independent school.

Gaining access

It was not always possible to gain access to classrooms at the times I had hoped to. It was most difficult for me to gain access to the history classroom at Enthabeni in 2005. I visited the school in June 2005, with a view to explaining the project and hoping to begin observation in the third term (August). A date was set for our visit, and when I phoned to confirm this, I was told it was not a good time to visit as the staff was completing the IQMS (Integrated Quality Management Systems) procedure⁸. Another date was set. When I phoned to confirm our visit, I was told that students were writing end of term tests. These would take until the end of the third term. I finally visited the school for observation in the second week of the fourth term.

At North Hill, the history teacher was booked off sick for a month during August, so I was able to observe her only during September 2005.

In many South African schools, the window of opportunity to observe 'normal' teaching is fairly small, since the last few weeks of every term are taken up with testing. In 2006, I decided to do my observations at Enthabeni in May, since there was not a great deal of teaching happening in the second half of the year in 2005.

3.4 Data analysis

Since I collected a range of different types of data, different tools of analysis were used. Some parts of the study emphasise description (the teacher training workshop) and others emphasise analysis. The levels and depth of analysis differ too, in that the classroom data and curriculum documents are subjected to the most in-depth analysis of both an inductive and deductive nature, while the FET training workshop is described in a more broad and narrative way.

⁸ The Integrated Quality Management System is a system of self and peer-assessment for teachers. Ideally this should take place during 'normal' teaching times, but at Enthabeni it appeared that 'normal' teaching ceased in order for the process to take place.

3.4.1 Interviews

The data generated from interviews with the writers of the FET history curriculum, the textbook publishers and with the history teachers were analysed using content analysis. These were analysed inductively, which allowed the data to speak through themes that emerged from the interviews. However the theoretical concepts around interviewee's perceptions of history as a discipline and the concepts of recognition and realization rules formed the backdrop to the analysis.

3.4.2 Curriculum documents

Two curriculum documents were analysed. These were the 1996 Senior Certificate Syllabus for History (Higher Grade) called the Interim Core Syllabus (ICS) and the 2003 National Curriculum Statement for History Grades 10 -12 (General) (NCS). The documents were deductively analysed using the analytic concepts of classification, framing, and levels of cognitive process. Following Morais and Neves (2001) and Morais et al (1999), the sentence was the unit of analysis. Coding was done using an Excel spreadsheet. Each curriculum statement was imported into the first column of the spreadsheet, with one sentence per row. In terms of assessment, I used the Revised Bloom's Taxonomy to categorise the learning outcomes and assessment standards of the NCS. This analysis resulted in quantitative data.

A quantitative analysis was useful for describing and highlighting the theory of instruction, the integration of knowledge and the cognitive demand in both documents. There were three main deductive categories: knowledge integration, theory of instruction and discourses and competences. These were developed into an external language of description with which to read the curriculum documents. However, a more qualitative and inductive analysis was also done to capture key ideas that were not captured by the deductive categories, such as the discourse about the purpose of teaching history, the role of values in school history and the actual content to be taught.

Thus both qualitative and quantitative data analysis methods were used. In both cases, the entire curriculum document was coded, including general sections in the NCS that are applicable to all subjects. Content statements for Grades 10 – 12 were also coded.

Framing

A study by Morais, Neves and Fontinhas (1999) used the concept of framing to analyse the instructional practices indicated in the Portuguese Science syllabus. Their study was interested in analysing the control relations between teacher and students.

They write:

If the syllabus legitimates an instructional practice where the discursive rules are controlled by the teacher, it transmits a sociological message in which the power of the teacher is *explicit*. The theory of instruction is *centred on the transmitter*. If... the syllabus legitimises an instructional practice in which control is given to the student, the syllabus transmits a sociological message in which the power of the teacher remains *implicit*. The theory of instruction is of a self-regulative nature, *centred on the acquirer* (p. 41).

Framing was used here in a generic sense to ascertain what degree of control is given in the curriculum document to the teacher and to the learner with respect to the transmission-acquisition process. It was not used in a fine-grained way to analyse selection, sequencing, pacing and timing in discrete ways. The following figure describes the framing categories which were used to analyse the curriculum documents.

Figure 2: Framing categories used to analyse the curriculum documents

Framing categories (adapted from Neves and Morais, 1999)

The key question is: to what extent does the learner have control of the learning/teaching/assessing situation?

F++ Clear emphasis to a directive role of the teacher in the T-L process (eg tells, informs, explains) or refers to cognitive and/or socio-affective competences which suggest a passive intervention of the student. Syllabus values a theory of instruction exclusively centred on the transmitter

F+ Emphasis the orienting role of the T in the T-L process (eg guides, accompanies) or refers to cognitive and/or socio-affective competences which suggest some participation of the student. Syllabus values a theory of instruction which, although centred on the transmitter, considers the student's intervention.

F- Emphasis on a higher degree of intervention of the student in the T-L process (eg project work, realizes free activities) or refers to cognitive and/or socio-affective competences which suggest a higher degree of student autonomy. Syllabus values a theory of instruction which is mainly centred on the acquirer.

F^{++e}/F⁻ⁱ The statement carries a strongly framed message which is external to the learner (eg the learner will be able to, the learner must) and yet carries a weakly framed message which is internal to the learner, and suggests a cognitive and/or socio-affective competence which has a higher degree of student autonomy. Most Learning Outcomes, Assessment Standards etc are coded in this way.

Uncoded Statements which did not mention anything about the learning and teaching process

Statements that place control of the learning process in the hands of teacher are strongly framed (F++). Statements that place control of the learning process with the learners are weakly framed (F-). In the case of an outcomes-based curriculum, outcomes and assessment standards are phrased in terms of what learners are able to do. It appears that they are weakly framed, as they suggest a high degree of student autonomy. However, the statements are also strongly framed because they do not allow the learner any leeway in what must be learnt – learners are expected to develop certain skills and competences. Thus these statements were coded as strongly framed external to the learner, and weakly framed internal to the learner (F^{++e}/F⁻ⁱ).

I only categorized framing relationships between the teacher and learner, not framing relationships between the curriculum and learner, outcomes and learner etc.

Classification

Classification refers to the strength of the boundaries between objects, in this case, traditional subjects. The curriculum documents were coded using three different types of classification relationships, namely inter-disciplinary, intra-disciplinary and inter-discursive relationships.

Figure 3: Classification categories used to code the documents

Inter-disciplinary classification asked the question: what are the discursive relations *between* History and *other* subject disciplines? (both in terms of History knowledge, and procedures, principles and concepts).

- C++ The boundaries between History knowledge and procedures and other subjects are very strong.
- C+ The boundaries between History knowledge and procedures and other subjects are loosened.
- C- The boundaries between History knowledge and procedures and other subjects are very weak.

Intra-disciplinary classification asks the question: what are the discursive relations between various topics *within* the subject of History?

- C++ The topics taught within the subject of History are kept very separate, with strong boundaries.
- C+ There is a loosening of the boundaries between the topics taught within the subject of History
- C- The boundaries between the topics taught are very weak, History is taught according to a series of themes, such as “liberty”.

Inter-discursive classification asks the question: what are the discursive relations between school discourse and everyday discourse, that is, between the subject of history and everyday knowledge?

- C++ History is presented as a discipline with very specific content and procedures where the boundaries between the discipline and everyday knowledge are very strong.
- C+ The boundaries between History and everyday knowledge are loosened.
- C- The boundaries between History and everyday knowledge are weak. Learners learn generic skills in the context of everyday knowledge.

Instructional and regulative discourses

Bernstein makes a distinction between instructional discourse (ID), the discourse of competence or skills and regulative discourse (RD), the discourse of social order.

Specific instructional discourse (SID) refers to knowledge and cognitive competences which indicate the knowledge and cognitive competences which indicate the knowledge contents to be taught in the teaching-learning context. Specific regulative discourse (SRD) refers to character, conduct and manner. General regulative discourse (GRD) refers to the national values and attitudes that are desired by the state. Following Green and Naidoo (2005) cognitive competences which were general (ie not specific to the subject of History) were coded as general instructional discourse (GID).

The competences in the Specific Instructional Discourse (SID) are cognitive knowledge and competences which are developed in the teaching-learning process. These were coded as either simple or complex cognitive competences. The competences in the Specific Regulative Discourse (SRD) are competences which refer to values and attitudes, rather than to cognitive development. Again, these were coded as either simple or complex socio-affective competences.

There are also statements in the curriculum documents (particularly the Interim Core Syllabus) that are simply statements of content knowledge that must be covered. These statements were coded as “knowledge” statements. The following figure describes the discourses and competences categories which were used.

Figure 4: Discourses and competences categories used to code the documents

The following discourses and competences categories were used: (Neves & Morais, 2001)

General regulative discourse (GRD) refers to the national values and attitudes that are desired by the state.

Specific regulative discourse (SRD) refers to the micro level of the classroom, expressing exclusive focus on attitudes/conduct/ behaviour and socio-affective competencies to be developed in the teaching-learning process.

Complex socio-affective competencies (CSA) values and attitudes of a complex level. E.g. participation, community interaction, tolerance.

Simple socio-affective competencies eg obeying instructions

General Instructional Discourse (GID) cognitive competences which are not specific to the discipline of History, which apply more generally to learning

Specific Instructional Discourse (SID) refers to the micro level of the classroom, exclusively focused on cognitive knowledge and competencies to be developed in the teaching-learning process.

Complex cognitive competences (CC) concepts of high level of abstraction. E.g. data interpretation, problem identification, problem solving, critical analysis.

Simple cognitive competencies (SC) knowledges and competencies of low cognitive level. E.g. recall, list, state etc

Neves and Morais (2001) use just two categories (complex and simple) to make distinctions within the instructional and regulative discourse. In fact these are a simplification of the cognitive skills described in Bloom's Revised Taxonomy. To do a more fine-grained analysis of the specific instructional discourse (SID), the knowledge and cognitive categories generated by Bloom's Revised Taxonomy were used to analyse the Learning Outcomes and Assessment Standards of the NCS.

Examples of how various sentences in the curriculum documents were coded using these categories are found in Appendix G.

3.4.3 Provincial teacher training workshops

The data collection strategy here was participant observation, with data recorded through field notes. The field notes were written up into a descriptive narrative of the workshop. These data are not analysed in a fine-grained way, with a focus more on content analysis and looking to see how the official discourse about history teaching changes as it is presented to teachers. It is also concerned with the relative autonomy of the 'state actor' or the workshop facilitator to change the message of the official discourse.

3.4.4 Classroom observation

Classroom data are probably the most complex of the data I was working with in this study. The first step to reducing the data was to transcribe the video recordings, thus changing them from visual to textual data. These were then deductively analysed using the concepts of classification and framing.

The first step of organizing the transcriptions was to divide the lessons (which ranged from 30 minutes to 60 minutes in length) into episodes. This was done because most teachers will shift between different teaching methods and learner tasks during a lesson. Thus it is more rigorous to categorise different episodes in a lesson rather than to label a whole lesson as ‘weakly framed’ for example. An episode is signalled by a change in the kind of activity happening in the classroom (eg a shift from content-based teacher talk to a group work activity to a learner report back session).

The following episode descriptions emerged from the classroom data. Episodes are chunks of time in the classroom when a particular activity is taking place. New episodes are signalled by a change in the kind of activity happening. Episodes need to have a time dimension, so we can say what percentage of each lesson is spent on a particular episode.

Figure 5: Descriptions of classroom episodes

Non-content based	Administrative activity eg. Organizing the class into groups, checking homework, set dates for tests.
	Non-content based class interactive. Some learners and teacher engage in discussion on topics that are not related to the subject being taught, eg about a recent school trip.
Content based Teacher focus	Content-based teacher talk eg. T explains a particular topic in a sustained way. Generally there is minimal participation from learners who sit quietly and may answer simple questions requiring yes/no answers.
	Teacher led question and answer. There is minimal teacher explanation, with the focus on the teacher asking questions, often to recap work already covered.
<i>Whole class focus</i>	Whole class interactive. Teacher works with the whole class in an interactive way. Presentation/ explanation is interspersed with a variety of questions which engaged learners beyond yes/no answers. Learners also ask questions. T and L, and sometimes learners, engage in dialogue.
Learner focus	Pair/ group work. Learners engaged in group work.
	Independent work. Learners worked individually on a task
	Learner report back. Learners report back on group tasks.

The second step of analysis was to categorise these episodes using the concepts of classification and framing. As has already been explained in the theoretical chapter these concepts need to be operationalised into an external language of description that can ‘read’ the data. Here I draw on the PhD work of Ursula Hoadley (2005) who created a detailed rubric of indicators to operationalise the concepts of classification and framing. Hoadley developed an external language using the work of Morais and Pires and Morais and Neves and more generally the work of the Sociological Studies of the Classroom project at the University of Lisbon (Ensor & Hoadley, 2004). Her rubric was focused specifically on numeracy and literacy in grade 3 classrooms, and I have adjusted it to speak to data collected in History Grade 10 classrooms. This rubric can be found in Appendix H.

Hoadley and Ensor (2004) provide a number of reasons for using this kind of scheme which clearly describes the indicators used to analyse the data. It is transparent and fairly open to interrogation that means that teachers and researchers can challenge the findings. It provides a language whereby we can describe classroom life in a non-evaluative way. The rubric does not set out with an already-formed idea of what good classroom practice looks like. It enables us to describe classroom practices in clearer detail than simply using fuzzy terms such as ‘learner-centredness’.

The rubric provides a set of indicators for the following conceptual categories:

Figure 6: Conceptual categories for analysis of classroom data

Framing	Discursive rules (Instructional discourse)	The extent to which the teacher controls the selection of the content
		The extent to which the teacher controls the sequencing of the content
		The extent to which the teacher controls the pacing of the content
		The extent to which the teacher makes explicit the rules for evaluation of learners’ performances.
	Hierarchical rules (Regulative discourse)	The extent to which the teacher makes formal or informal the social relations between teacher and learners

Classification	Relations between discourses	Inter-disciplinary (strength of the boundary between history and other subject areas)
		Intra-disciplinary (strength of the boundary between various topics within history)
		Inter-discursive (strength of the boundary between history and everyday knowledge)

Adapted from Hoadley, 2005, p. 90

Conceptual demand

Bernstein’s categories of classification and framing show us the inner logic of pedagogy, using a language that describes education in its own terms. They describe the pedagogic discourse but they do not give us a purchase on the cognitive complexity of the learning and teaching happening in the classroom. In her coding instrument, Hoadley (2005) includes the category of “conceptual demand” of the instructional knowledge introduced in the classroom. Her categories deal only with the cognitive process dimension, and are quite general. I explored the merit of using a matrix of Bloom’s revised taxonomy table (Anderson et al., 2001) that includes both a knowledge dimension (four levels: factual knowledge, conceptual knowledge, procedural knowledge and meta-cognitive knowledge) and a cognitive process dimension (six levels: remember, understand, apply, analyse, evaluate and create). This taxonomy is useful for analysing learner tasks, assessment tasks and the assessment standards of curriculum documents, but not for pedagogy, as it is difficult to pin down a unit of analysis.

General texts on methods for teaching (Jacobsen et al., 1985) make the distinction between low level and high level questions. Low level questions are those which require a student to recall information already memorised, while higher order questions require a degree of intellectual processing on the part of the student. In terms of Bloom’s Revised Taxonomy, recall questions would be seen as lower order questions, while the other five cognitive domains would be seen as higher order questions.

Questions asked by teachers were counted and categorized as either higher order or lower order questions. I identified only those teacher questions that could be

considered to be part of the instructional discourse. I discounted questions that were rhetorical, which is to say, questions to which the teacher did not expect an answer. I then counted the number of questions that could be considered higher order and those which could be considered lower order questions. When teachers asked the same question more than once, the question was counted as one question.

Questions asked by the learners were counted and categorized as either administrative or instructional. Examples of administrative questions are those requesting information about writing a missed test, or about when to start a group report back), or as instructional. Instructional questions were those that pertained to the topic under discussion.

To summarise, the classroom data analysis followed these steps:

Figure 7: Summary of the steps of data analysis for classroom data

	Unit of analysis	Categories of analysis
Step 1	Transcription of video data	
Step 2	Each lesson was ‘chunked’ into a series of episodes.	Episodes
Step 3	Episodes were analysed using the concepts of classification and framing	See rubric in Appendix H
Step 4	Teacher’s instructional questions	Higher/ lower order
Step 5	Learner questions	Administrative/ instructional
Step 6	Learner tasks	Bloom’s Revised Taxonomy

3.4.5 Learner assessment tasks

As well as video recording history lessons, I also collected a selection of learner portfolios in 2005 and 2006 together with copies of the tests and exams which learners were required to write in 2005 and 2006. The cognitive demand of these assessment tasks were analysed using Bloom’s Revised taxonomy. However this

deductive analysis did not capture a particular key issue, which was the way in which teachers made use of source material in their tests. Thus other categories were generated such as whether the sources were primary or secondary sources and how much detail was provided about the context and author of the source.

3.5 Conclusion

The study employed a wide range of data collection methods across the various levels of the pedagogic device. Since different kinds of data were collected, different kinds of analysis tools were used to make sense of the data. Key concepts are drawn from Bernstein, such as classification, framing and regulative and instructional discourses. Bloom's Revised Taxonomy was used to analyse levels of questioning, both in the classroom and of the formal written assessment tasks. In some instances, deductive categories were not sufficient to capture the nuance of details that were required, hence inductive analysis was also used. Since the study ranges over all the levels of pedagogic device, it was clear that it was not possible to analyse all the data collected in great detail. Thus some of the data are analysed in structured and deductive ways, particularly the curriculum documents, pedagogic practice and assessment tasks from the three schools. Other data such as the provincial workshops and interviews with textbook writers are analysed at a more broadly descriptive level.

Chapter 4

The field of production: historical discourse and its recontextualisation

4.1 Introduction

The purpose of this chapter is to describe the nature of historical discourse, as professional historians understand it and then to explore how this discourse is recontextualised as school history. This chapter has two main sections. The first section explores the nature of history as a discipline within the field of production. It describes the epistemological shifts in history over the past two centuries in an attempt to uncover what history knowledge is and what makes such knowledge different from other disciplines. This is a vast terrain and this chapter can only touch on key moments with fairly broad brushstrokes. It draws on both the writing of historians and the sociology of knowledge to shed light on the structure of history as a discipline and to answer questions about what does it mean to ‘do history’, to think historically, to be historically literate? Is there such a thing, akin to Paul Dowling’s (1998) ‘mathematical gaze’, as an historical gaze? And if there is an historical gaze, how will we know it?

The second section of the chapter explores the links between history as an academic discipline and its recontextualisation into the virtual or imaginary discipline of school history. It draws on writers in the field of history education and sociology of knowledge to understand what constitutes school history and what is its purpose. It is concerned with the extent to which the nature of school history is informed by the discipline of history. It describes how the substance and the purpose of school history are different in different countries, with a particular focus on history teaching and learning in South Africa since the 1970s.

In terms of the structure of the thesis, this chapter is located within the field of production of the pedagogic device, as the following figure shows.

Figure 8: The pedagogic device and this study

(Form of regulation) Field of practice	Processes	Typical agents	This study
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Academics,	Knowledge structure and procedures of history (Chap 4).
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum writers	Processes of making the History NCS (Chap 5). An analysis of the changes in the history curriculum (1996 and 2003) (Chap 6).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.	Teacher trainers and writers of textbooks.	A description of a provincial teacher-training workshop and a description of how selected textbook writers and publishers understand their work (Chap 7).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Teachers	An analysis of pedagogic practice in three Grade 10 history classrooms in 2005 and 2006 (Chap 8). An analysis of assessment tasks (Chap 9). Teachers' perceptions of the new curriculum (Chap 10)

4.2 History as a discipline

4.2.1 What is history?

In his book on historical cognition, Sam Wineburg sums up two different approaches to the question ‘what is history?’ He writes that his assumption about history is that

... [it] teaches us to make choices, to balance opinions, to tell stories, and to become uneasy – when necessary – about the stories we tell. This history is worlds apart from Rush Limbaugh's⁹ version: 'History is real simple. You know what history is? It's what happened' (Wineburg, 2001ix).

This quote illustrates an objective understanding of history as 'what happened' and an understanding of history as our interpretation of what happened. This section will describe these different ways of understanding history as well as a post-modern perspective.

It is generally accepted that history as a discipline was started by the Greeks, who were considered the first to present an organised body of knowledge about past times (Carretero & Voss, 1994). Greek writers tried to distinguish facts from fiction, even though they were not fully able to accomplish this. In the fourteenth century Arab historian Ibn Khaldun made a key contribution in terms of raising the issue of causal mechanisms and processes in producing historical and social events. During the Enlightenment, a number of key ideas arose, such as the idea of progress, the existence of a rational plan for history and the idea that scientific ideas could be applied to history. History was influenced by the advance of the social sciences as empirical and systematic intellectual endeavours (Ibid.)

It was during the second half of the nineteenth century that history in the western world began to come into its own as an academic discipline and a professional activity (Mackie, 2004). The national movements of Europe inspired a range of popular, nationalist histories. Historians were influenced by the age of science and reason, and embraced a 'scientific method' that was advocated by the German historian, Leopold von Ranke. Von Ranke encouraged historians to see themselves as specialists whose task it was to discover secrets of the past with scientific accuracy. He set the historian's task: to find out *wie es eigentlich gewesen is* (how it really was) (Tuchman, 1981a). The main task of the historian was to see the past through the eyes of those who lived in that world, and to 'step into their shoes'.

⁹ Rush Limbaugh hosts the 'most listened to' radio talk show in the United States. He calls himself a conservative. http://www.rushlimbaugh.com/home/about_the_show.guest.html

This objectivist perspective began to shift in the latter half of the twentieth century. In Britain, Carr's seminal book called 'What is history?' that was published in 1961, influenced a number of historians and students of history (Evans, 2002). Carr made a distinction between history and chronicle. History was an attempt to understand and interpret the past, to explain the causes and origins of things, while chronicle was merely cataloguing events without trying to make connections between them. For Carr it was vital that a historian could show that something had happened, but the really important task lay in the explanation and interpretation. The central task of the historian was to discern and interpret patterns and regularities of the past. Carr said that 'history is an unending dialogue between the present and past' (Carr, 2001), rather than an objective description of what happened in the past.

For Carr, the purpose of history is to help us understand the past and mould the future. He felt that historical causes and trends were only useful to the historian if they helped society understand and deal with the problems it faced in the historian's time¹⁰. He urged historians to look beyond the history of Europe and Britain to Russia, China and Africa. He also challenged the conventional assumptions about objectivity by emphasising the importance of the historian understanding his or her own biases and preconceptions. He believed there was a true account of the past out there, but the process of selection and interpretation compromised the objectivity with which it was presented (Fernandez-Armesto, 2002).

Carr's book has never been out of print and was re-published as a 40-year anniversary edition. Tosh (2006) writes that at one level its continuing popularity is surprising, as the book was written against the background of the Cold War and was very much rooted in its time and place. But what Carr's book did do was to establish a new genre about the nature of history; it was a watershed in the writing of historiography as it raised a number of views that could not be ignored. The most obvious message of the book is still so relevant: that the priorities and findings of historical enquiry inevitably change over time. 'He showed that at every level of historical enquiry, from the

¹⁰ Evans (2002, p. 2) believes that Carr took this stance because his background was in journalism and in the civil service in the area of international relations. He was not a historian in that he never studied history nor taught history at a university.

choice of source materials through the finished work of history, the present intrudes on the reconstruction of the past' (Tosh, 2006, p. xii).

At an epistemological level Carr essentially challenge the received positivist view of history, which was of history as a science that employed the same procedures as the natural sciences: the meticulous observation of reality by a disinterested observer, where generalisations flowed logically from the data. Tosh (2006) suggests that this anti-positivist position corresponds to the philosophical school called idealism, where historical knowledge is understood as inherently subjective.

In support of the subjective perspective, Wilson (1999) argues that history cannot be a science because history cannot be repeated in similar conditions. Historical 'facts' are what the historian happens, or chooses, to find and may change if he or she learns more about the subject. He uses the example of Christopher Columbus to show that interpretations of historical facts change as a result of different political agendas and different cultural assumptions. He says there was no new evidence found between 1892 and 1992, but the acceptable interpretation of Columbus' 1492 voyage shifted remarkably across the century. In 1892, there were Europe-centred commemorations that praised the triumph of European civilisation and progress. In 1992, there was a much greater awareness of impact of discoveries on the 'New World' and those who were colonised.

Carr's social constructed approach raised debates in the 1960s with historian Geoffrey Elton supporting the primacy of political history and of narrative. Elton argued that history did not help us to understand the present and denounced the faddishness of social history and the study of an extra-European past (Cannadine, 2002). American historian Barbara Tuchman (1981) writes that she read Carr's book only after she had written her first historical narrative. Her answer to Carr's question as to whether history is the examination of past events or the past events themselves is that she is a firm believer in what he calls the 'preposterous fallacy' of historical facts existing independently of the historian. She places herself within the Rankean ideal of history when she writes

The historian's task is rather to tell what happened within the discipline of the facts... His method is narrative. His subject is the story of man's past. His function is to make it known (Tuchman, 1981b, p. 32).

Although much history continued to follow the Elton way, which is to say it was traditional political and constitutional scholarship which relied heavily on archival documents (Cannadine, 2002), overall Carr's ideas had great impact, particularly on the work of historians in Britain in the 1960s and 1970s. It seems that his dynamic vision of the relationship between the past and present had a positive impact on younger historians (Tosh, 2006). It was a time when social science theories like Marxism and modernisation theory were in vogue and a liberal political and intellectual atmosphere prevailed (Evans, 2002).

Within the Marxist tradition, there were debates between the social historians, such as E.P. Thompson¹¹, who placed a strong focus on agency and on people's ability to overcome structures, and the Althusserians who placed a stronger emphasis on the role of structure and the way in which structures determine the course of history.

The grand theory of Marxism was questioned as a post-industrial society emerged and communism collapsed in the Soviet Union and Eastern Europe in 1989 and 1990, as was modernisation theory as unchecked industrialisation led to environmental degradation. The models of causation that historians had been using did not explain new conflicts based on gender, ethnicity, religion and sexual orientation. The grand narratives of modernity were no longer pre-eminent, and the new narratives of feminists and other minority groups began to be heard (Cannadine, 2002).

In the early 1990s, some historians moved away from social theory to linguistic theory, arguing that historians depended on texts for their knowledge of the past, yet these texts were simply 'arbitrary assemblages of words that themselves had only come into being through an arbitrary process of human invention' (Evans 2002, p. 6). This linguistic turn was pre-figured by the structuralist tradition. Post-modern thinking holds that there cannot be one 'absolute truth', but that truth is always

¹¹ His book *The making of the English working class* (1963) described how the working classes developed a new consciousness by 1830 and were able to work together for collective political action. Critics felt that he exaggerated the power of collective agency.

influenced by context and experience. Historical documents and sources are constructed in a past reality which we can never really know or truly understand outside the text itself (Berkhoefer, 1995). Hayden White is a post-modernist thinker who wrote that there are no grounds in the historical record for preferring one way of construing its meaning rather than another. His book *Metahistory* views the historical text as a literary artefact (Wilson, 1999). Thus historians do not uncover the past, they invent it (Tosh, 2006).

Epistemologically, the post-modern perspective represents the most extreme view of historical knowledge being subjective, that it is in fact just a story. Historical writing is simply a form of literary production. There can be no grand narratives such as ‘the rise of capitalism’; rather the past can only be arranged into a multiplicity of stories. This post-modern relativism represented a sense of crisis for some historians, as it undermines what was seen as the basis of the discipline: reconstructing and interpreting a past, based on available evidence.

So over the past century or more, the epistemological nature of History as a discipline has shifted from a positivist, scientific approach to a more subjective view that history is the *examination* and *interpretation* of past events rather than the past events themselves. Most recently the perspective of post-modernists is that history can only be seen as a multiplicity of stories and narratives.

In terms of interpreting the past, historians have been influenced by social theories that have been seminal at particular times. For example, Karl Marx’s ideas have had a profound influence on the writing of history, providing economic and class theories of change, particularly in the 1960s and 1970s (Wilson, 1999). The rise of feminism gave rise to gender perspectives which focused on women in history. Post-structuralism and post-modernism have also had key influences.

There has also been a change in the nature of what or who has been considered ‘worthwhile’ for historical study. Political and parliamentary history which focused on the ‘great white men’ has in part given way to a new emphasis on cultural history which has emerged where historians began writing ‘about people again, and above all about humble ordinary people, history’s obscure, the losers and bystanders in the

process of historical change' (Evans, 2002, p. 8). The shift to cultural history does not mean that other forms of history no longer exist; rather there is still a vast range of history being written, such as political, economic, religious, social, gender and military history.

4.2.2 A popular history

While for the most part of the twentieth century, history was the preserve of historians; in the new millennium there is a sense of history being for everyone. Evans (2002, p. 10) writes that 'Consciousness of history is all pervasive at the start of the twenty first century'. There is an explosion of history being written within the academy within a range of sub-disciplines, as well as outside it as a number of people in Europe, Britain and America pursue their family history. There is a new popular interest history on television, major films as well as a range of literature that takes the past as its setting (Cannadine, 2002; Evans, 2002). Tosh (2006) believes that this popular fascination with the past is about a quest for personal roots, the need for a perspective on present-day cultural identities and understanding social problems.

Some argue that what this means is that history is no longer a particularly specialist discipline. Lowenthal (2000) believes that history is amateur in its approach, its appeal and its apparatus. It has 'no technical jargon and requires no grounding in some arcane aspect of nature or human nature' (2000, p. 63). He continues:

Not only are we inclined to think that anyone *can* learn history; we are inclined to feel that everyone *should* learn history. Only geography among other disciplines makes similar claims to universality, and geographers have lately become more and more narrowly professional, addicted to scientism, social or natural... History's amateur character leaves it highly vulnerable, however, to assaults on the integrity of historical knowledge... And because it is open to all and matters so passionately to many, history is readily seized on as a weapon for this or that cause, this or that faith – it continually risks being turned into civics or heritage. (p. 64)

Similarly, Fernandez-Armesto (2002) argues that history is the most open and accessible of academic disciplines, that it requires no special training, 'except in modest skills which any literate person can easily and quickly pick up without help' (p. 152).

The rise of the amateur is a twenty first century trend in the industrialised world: everyone's opinion counts as anyone is invited to phone in to radio and television chat shows, and anyone can become a television 'star'. The massive explosion of within-reach information technology enables anyone to post their journals, videos and photos on the Internet or to write what they like on Wikipedia¹².

However, historians like Tosh would argue that there is a difference between what historians do and other sorts of thinking about the past; a distinction between a professionally informed historical awareness and other, more instrumental versions of the past. He uses the term 'social memory' to describe popular knowledge about the past, a picture of the past which serves to explain or justify the present, often at the cost of historical accuracy (Tosh, 2006, p. 3). He suggests that there are three principles that underpin historical awareness as distinct from social memory. The first is the recognition of the gulf that separates our own age from all previous ages. So the first responsibility of the historian is to understand the difference of the past. The second principle is that the subject of enquiry must remain in its contemporary context. The third aspect is the recognition of historical process, which means understanding the relationship between events (pp. 9 – 12).¹³

Tosh sums up his understanding of the differences like this, clearly affirming his belief in the importance of the professional historian:

Professional historians insist on a lengthy immersion in the primary sources, a deliberate shedding of present-day assumptions and a rare degree of empathy and imagination. Popular historical knowledge, on the other hand, tends to a highly selective interest in the remains of the past, is shot through with present-day assumptions and is only incidentally concerned to understand the past on its own terms (2006, p. 12).

He seems to be describing both procedural knowledge – that of a deep reading of primary sources, as well as way of being, a historical gaze which encompasses an ability to understand the past in its own context and to approach it with empathy and imagination.

¹² See for example Andrew Keen's book *The cult of the amateur. How today's Internet is killing our culture and assaulting our economy* (Nicholas Brealey).

¹³ Drawing on Bernstein's work on knowledge, which I discuss shortly, we could say that social memory would be a horizontal discourse, located in the everyday, and historical awareness would be a vertical discourse.

4.2.3 The work of historians

In differentiating the work of historians from social memory, Tosh begins to describe how he understands the work of an historian. Leinhardt (1994) describes an extensive study which included interviews with and classroom observations of both school teachers and historians. The interviews were focused on how historians understand what reasoning in history means. The historians agreed that it was vital to construct a compelling narrative which has internal coherence. Narrative coherence included mystery, discovery, evidential exhaustivity, chronology and causality. Evidential exhaustivity means considering all the evidence that could be found to support or to contradict the case. Historians work with large quantities of information, and thus need to use devices to impose some kind of organisation and one such device is using chronology to order events. Establishing plausible causality is another device for organising information. The work of a historian is to build an historical case, to develop a central hypothesis and to build a narrative around it. It is vital that the evidence be interpreted in terms of the context of the original times and the implications of evidential survival (that is an understanding of why particular evidence exists and other evidence does not).

Rosa's (1994) understanding of History (intentionally with a capital letter) and what historians do is closely related to Leinhardt's ideas. He argues that historians rely on the records available to them and they have to explain both what happened and why it happened. To do this, the historian has to rely on both empirical evidence, provided by the records of the past, and conceptual evidence, provided by explanatory concepts borrowed from other disciplines. The final product is a narrative which should exhaust all the empirical evidence and should also offer a plot.

Tosh ends his book by arguing that history is a hybrid that defies classification, but that nothing is gained from attempting to define it in absolute terms.

It concerns both events and structures, both the individual and the mass, both mentalities and material forces. Historians themselves need to combine narrative with analytical skills, and to display both empathy and detachment. Their discipline is both re-creation and explanation, both art and science...(Tosh, 2006, p. 341).

4.3 Recontextualising the discipline

There is history as a scholarly pursuit and there is history as a school subject. In the field of production history knowledge and discourse is produced. In what ways is this knowledge recontextualised and taught in school (the field of reproduction)? What is the relationship between the two fields? Using physics as an example, Bernstein argued that the selections from the field of production ‘cannot be derived from the logic of the discourse of physics’ (1996, p. 49). However, both Muller (2007) and Dowling (2007) have argued that the logic of the discourse must have some influence on its recontextualised form. There must be some relationship, some precursor between school knowledge, university knowledge and the field of production.¹⁴

In this section, I examine how the perspectives from historians and from sociologists are useful in understanding the ways in which the discipline might be recontextualised in the school classroom. I describe the different ways in which the purpose of school history is conceptualized and then focus on the specifics of how history is taught and learned in different contexts across the world. Finally I describe the changes in history education in South African classrooms since 1980.

4.3.1 Knowledge structures and school subjects

While philosophers have traditionally asked questions about knowledge and the disciplines (Hirst, 1973; Phenix, 1971; Schwab, 1971, 1964), since the 1970s sociologists have also entered the field, with a focus on the sociology of knowledge. Here I draw on the work of Bernstein (1999) and Muller (2006) and use a lens from sociology of knowledge to examine the *structure* of history as discipline and how it might be recontextualised into a school curriculum.

¹⁴ Essentially the question is about how is a school curriculum structured and organised. There has been work on this question in the field of curriculum studies for decades. Strike and Posner (Strike & Posner, 1976) summarise two key approaches. One is the bottom-up view which attempts to identify the simplest elements of learning and how these are associated. The general is understood as the construction of the particular. A second perspective is the top-down view which starts with the concepts and how they generate their instance. This is essentially the ‘structure of the disciplines’ approach favoured by Bruner and Schwab.

Muller (2006a) extends Bernstein's ideas about vertical and horizontal knowledge structures to school subjects and suggests that curricular subject structures also differ as to their requirement for stipulation of knowledge content. For vertically structured disciplines like Mathematics, Physics and the other natural sciences, content sequencing is vital. He places History midway along the vertical/horizontal continuum where sequence of content is less important, though conceptual progression remains critical. He argues that the more horizontal the subject, the more the same knowledge can be recurrently used. For example, in history the Second World War is repeated at different levels of explanatory abstraction. At the horizontal end of the continuum, HIV/AIDS is used often in Life Orientation. A historian like Tosh would argue that in order for students to gain a full understanding of the historical process or the relationship between events over time, it is important that they study 'huge swathes of history' (2006, p. 12).

The subject matter of history differs from the subject matter of science in that concrete objects are much less prominent in history, narrative is more important and problems in history do not have agreed upon solutions (which one generally finds in science). History subject matter that is valued is delineated by any given society (Torney-Purta, 1994).

Muller (2006a) suggests that the weaker the internal grammar of the knowledge structure, the weaker the connection between content and conceptuality. Practically this means that the same concept can be elucidated by different content. This seems to be the case for the History National Curriculum Statement (Schools, Grade 10 -12), where particular concepts, such as 'the quest for liberty' can be illustrated using a range of different exemplars, such as the French Revolution, the American War of Independence and the struggle against apartheid (see Chapter 5 for more detail).

Muller makes the tentative generalization that the more vertical the parent knowledge structure of the subject (e.g. physics), the greater the importance of content and the sequence of the content, over cognitive skills. Conversely then, we can say that a horizontal subject like history has a stronger focus on cognitive skills, with less importance given to the content and the sequence of the content. Thus an

understanding of the internal knowledge structure of the discipline, gives us insight into how that discipline might be recontextualised at a school level.

We have seen how content sequencing is not as critical in history as it is in vertically structured disciplines, though obviously some kind of progression is still vital. Perhaps the progression and sequencing key in a horizontal subject like history lies in the procedural issues or historical skills, and in the cognitive skills particular to history. Its specialisation lies in its procedures. Later in this chapter, I focus on various understandings of historical thinking for students (wonderfully described by Wineburg (2001) as an ‘unnatural act’). But first I examine a different perspective on recognition and realisation rules for history, which is provided by the ‘Sydney school’ of systemic functional linguistics (SFL).

Christie and Martin (1997) use the theory of systemic functional linguistics (SFL) to consider secondary school literacy in relation to workplace and academic discourse. Their assumption is that essentially different school subjects make different literacy demands on learners (that is the legitimate text that must be recognised and realised is different).

Martin (2007) shows how SFL can be used to analyse both a hierarchical knowledge structure like science, and a horizontal knowledge structure like history. He argues that history is not a technical discipline (p. 43), in that it borrows uncommon sense classification from other fields. Classification in history tends to be instancial, arising in the course of the development of a particular discussion, but not transcending this text into the field as a whole. He says that activity sequencing is a technicality that is specific to history and that time, chronology and sequencing are key aspects of historical discourse. Martin also distinguishes between technical and specialised lexis. Technical lexis can be learned by definition, through language, while specialised lexis is learned through observation (p. 41).

Martin (2007) shows how time is nominalised in history texts.

Time in history texts is often nominalised, a process of ‘thingification’ whereby activity is reconstrued as abstract things... Once time is packaged as a thing, it can be named, and where proper names become established for phases of history, they do transcend the text/s which created them and enter

into the field as technical terms. Examples include *The Sharpville Massacre*, *The Long March*, *the Depression* (p. 44, 45).

In horizontal discourse, people act and interact, often involving other things, for example:

Frank **argued** with Mark.

The pool **attracted** Mike.

The use of nominalization results in a situation where abstractions affect abstractions. Martin (p. 46) uses a text from Tickner to show how this works.

Their call for Commonwealth involvement also strongly **argued** the case for land to establish their own cattle station. Their stand against injustice, however, **attracted** national publicity for Aboriginal land rights grievances.

So here, ‘calls’ (not a person) **argue** the case, a stand (not a person) **attracts** publicity.

Grammatical metaphor names the process that engenders vertical discourse. Usually grammar matches the semantics or meaning, where a verb names a process, a noun names the participant and an adjective describes the quality of something.

Grammatical metaphor ‘names the process where the grammar does not match the semantics’ (Martin, 2007, p. 52). Thus a noun can play the part of a process, a participant or a quality. Using the example above, ‘Their stand against injustice’ plays the role of a noun, or a participant as does the clause ‘Aboriginal land rights grievances’ which nominalises or ‘thingifies’ the grievances which Aboriginals have about land rights.

From a functional linguistic perspective, Martin argues that access to the vertical discourse of history is bound up with control of grammatical metaphor. Failure to access this recourse entails exclusion from hierarchical and horizontal knowledge structures (p. 55).

4.3.2 An historical gaze

Bernstein suggests that acquirers develop a tacitly acquired ‘gaze’, which means that they learn how to ‘recognise, regard, realise and evaluate legitimately the phenomena

of concern' (1996, p. 170). Thus a disciplinary gaze is about knowing the recognition and realization rules of that discipline. Dowling believes that gaining mastery of the esoteric domain (where both content and mode of expression are clearly mathematical) equips one with a mathematical gaze with which one can look out upon the world the 'see' mathematics in it (Ensor and Galant, 2005). Similarly, we might say then that an historical gaze is about gaining mastery over both history content and mode of expression. I have already discussed in Chapter 2 that in history the mode of expression is both about the specialist way in which history uses the language of time, chronology and explanations of cause and effect, as well as the specialised procedures historians use to interrogate primary sources. They do this through an understanding that people in the past thought and behaved differently to what we do, respecting the context and the setting of the subject of enquiry and recognising the relationship between events over time as historical process (Tosh, 2006). Implicit in this description, I argue, is a foundational, deep knowledge of the particular historical context being studied.

An analysis of the new FET history curriculum shows that what counts as the legitimate text in classrooms is changing (see Chapter 5). Thus key questions throughout this study will be: what are the recognition and realization rules in the history curriculum; to what extent do history learners (and teachers) recognise the specialty of the discipline they are within, and to what extent are they able to realise the rules?

4.3.3 History as a school subject

Ivor Goodson was responsible for bringing historical studies of the evolution of school knowledge to the fore in Britain in the 1980s, in response to the ahistorical characteristics of interactionism and sociology of knowledge (Goodson, 1985). In his book *School subjects and curriculum change* (Goodson, 1982), he focuses on the conflict over Environmental Studies in Britain in the 1970s. His main hypotheses emerging from this study are that subjects are not monolithic entities, but rather are shifting amalgamations of sub-groups and traditions; that in order to establish a school subject, subject groups tend to move from promoting pedagogic and utilitarian

traditions towards the academic tradition, and that subjects in schools clash over status, resources and territory. In applying these ideas to history, it is clear that what constitutes school history shifts with time. School history is influenced by changes in the field of production, where history discourse is debated and made. History typically plays a role in constructing the national identity of a society, and so the content of history curricula usually change with significant political changes (Torsti, 2007). What makes up school history is also different in different countries. There is no universal, monolithic and unchanging thing that is 'school history'.

4.3.4 Knowing history and/or doing history

British authors, Husbands, Kitson and Pendry (2003) describe two approaches to school history as the 'great tradition' and the 'alternative tradition'. The great tradition dominated history teaching in British schools for much of the twentieth century where the role of the history teacher was to give pupils the facts of historical knowledge. The pupil's role was to receive the body of knowledge, which was clearly defined, chronologically organised and framed by high politics. History was taught for largely intrinsic and cultural reasons, predominantly the 'acquisition of a relatively complex knowledge about an assumed shared national political culture' (Ibid., p. 9).

The assumptions of the 'great tradition' came under pressure with the establishment of the Schools' Council in 1963, which asked fundamental questions about the organisation and structure of the curriculum in England and Wales. The Schools' Council projects developed an alternative tradition of history teaching with quite different assumptions about the role of the teacher, the selection of content and the purposes of teaching history. The appropriate content for the history curriculum was also debated. Historians like E.P. Thomson, Sheila Rowbotham and Eric Hobsbawm were writing new radical and feminist histories in Britain in the 1960s and 70s, which transformed the concerns of academic history and the academic training of history graduates (Husbands et al., 2003, p. 10). The alternative tradition emphasised constructivist models of learner engagement with the past, a world history and the experiences of a variety of groups and a focus on historical skills.

The 'history as enquiry' approach was first used in Britain in the Schools' Council History 13-16 Project, which aimed to revamp the nature of history as it was taught in schools. It drew heavily on Paul Hirst's theory of academic disciplines as forms of knowledge. He believed that the disciplines constituted fundamentally different ways of knowing (Hirst, 1973). The Schools' Council History 13-16 Project introduced students to the nature of historical evidence, the nature of reasoning from evidence and the problem of reconstruction from partial and mixed evidence (Wineburg, 2001).

This view of understanding history is summed up by Fines (1983)

History is not 'what happened in the past'. We simply cannot know what happened in the past – certainly we cannot know all of it, and none of it can we know for sure... History is what we can do with what comes to us out of the past... So handling evidence, which is basic to the historian's task, is a complex and difficult matter, and if we are going to understand how children approach history in classrooms, we must try to understand some of the difficulties; for although the task of the professional historian is very different indeed from the task facing children when they learn history, we must come to some conclusions about the world common to both tasks, i.e. history, and find the nature of the difference between those tasks (p. 20).

There are obviously different conclusions drawn about the world common to historians and to history students in schools. While many people in Britain in the 1970s embraced the idea that it was necessary to teach history as a 'mode of inquiry' rather than as a 'body of knowledge' (Dickinson, Gard, & Lee, 1978), not all scholars accepted that the purpose of history at schools was to teach students the historical skills of enquiry. Elton asserted the belief that the purpose of school history was not to produce research scholars, but rather that schools should concentrate on encouraging interest and some understanding of the past (Ibid.).

Perhaps setting up the two approaches as a dichotomy is somewhat misleading. The two approaches set up extreme versions, where the traditional approach is only about rote learning long lists of facts, and the alternative tradition is only about engaging with real historical evidence. A traditional approach in its best form would surely focus on building a sense of coherence between facts, and on presenting facts as problematic and on developing causal links and coherent arguments. The alternative

tradition in its best form would surely also engage with a coherent body of knowledge against which to read and engage with the primary sources. Lee and Ashby (2001) make a useful distinction between the substantive and procedural dimensions of history as follows:

Substantive history is the content of history, what history is 'about'...procedural ideas about history...concepts like historical evidence, explanation, change are ideas that provide our understanding of history as a discipline or form of knowledge. They are not what history is about but they shape the way we go about doing history (Husbands et al., 2003).

Both the substantive and procedural dimensions of history are vital, and it would be difficult to imagine worthwhile school history having one without the other. We have just seen that an historical gaze encompasses both the substantive, content dimension and the procedural dimension, including the key concepts of time, chronology and explanation.

While there might have been a general shift over the past two or three decades from teaching history as a 'body of knowledge' to history as a 'mode of inquiry' (particularly in Britain), this still takes different forms. Wineburg (2001) writes that historical understanding means different things to different researchers. In his review of British and American research into the topic over the past one hundred years, he notes that historical understanding for students can mean anything from memorizing a list of dates to mastering a set of logical relations, from being able to recite an agreed-upon story to contending with ill-defined problems resistant to single interpretations.

4.3.5 The nature of historical thinking for students

Wineburg (2001) suggests that psychologists interested in history cognition have usually looked to the body of writing by historians about historiography and history procedures to understand the nature of historical thinking. While these are important in describing historical cognition, they give no idea of how to achieve it. Wineburg's own empirical work is to understand how historical thinking really works by studying how students and historians interact with original historical evidence; how they come to understand history. He gave eight historians a set of documents about the Battle of

Lexington and asked them to think aloud while they read these. He noticed how they comprehended a sub-text, 'a text of hidden and latent meanings' (p. 65) For the historians, even those not reading in their specialist area, '(T)he comprehension of the text reaches beyond words and phrases to embrace intention, motive, purpose and plan – the same set of concepts we use to decipher human action.' (p. 67) When historians were asked to rank the relative trustworthiness of the documents, they ranked the excerpt from an American history textbook last.

He asked eight high achieving high school students to do the same task. Many of the students rated the textbook excerpt as the most trustworthy, failing 'to see the text as a social instrument skilfully crafted to achieve a social end' (p. 69). The students also did not read the source of the document before reading the text; the text's attribution was not that important, whereas for the historians, what is said is inseparable from who said it and under what circumstances. Wineburg surmises that one of the reasons these students had so little sense of how to read an historical text, is that textbook texts dominate the history classroom, and these are often written without any indication of judgement, interpretation or uncertainty.

Thus we can see that there are certain procedures that inform what historians do, most notably linking any primary text to its author and the context in which it was written, and reading the subtext of the document. Texts are seen as 'slippery, cagey, and protean, reflecting the uncertainty and disingenuity of the real world' (Wineburg, 2001, p. 66). This type of reading gives us some understanding of what could be called an historical gaze.

The Schools' Council History Project in Britain was one of the first history education projects that aimed to develop historical thinking. It identified six types of historical skills: 1. Finding information; 2. Recalling information; 3. Understanding evidence; 4. Evaluating evidence; 5. Making inferences and 6. Synthesis (Schools Council History 13 -16 Project, 1976). Shemilt (1980) conducted a large-scale evaluation of the project, which involved students who had been taught using the Project curriculum and a control group of non-Project students. Wineburg (2001) describes this study as yielding the most in-depth look at adolescent historical reasoning to date. In order to evaluate students' responses, the evaluation team developed a set of levels that

captured the range of historical conceptualisations. Level I response showed that events simply happened because they happened. Level II responses showed an understanding of history slotting into a pre-existing form. Level III responses recognised that historical narratives represented the past in selective ways, and Level IV responses understood that historical explanation was context-bound and context-sensitive. The evaluation showed that adolescents *were* capable of developing Level IV thinking, in contrast to what previous Piaget-inspired research had shown.

It is important to note that ‘historical thinking’ is not only about engaging with primary evidence. It is also about being able to explain past events, setting them in a broader sense of time and context. It is about building up a case, or an argument, using the evidence and one’s knowledge of a particular time and place.

For example, Americans Leinhardt, Stainton, Virji, & Odoroff (1994) argue that the key must be to develop reasoning and mindfulness in the history classroom. Their understanding is that one of the components of reasoning in history is the process by which central facts (about events and structures) and concepts (themes) are arranged to build an interpretive historical case. They argue that building a case requires at a minimum, analysis, synthesis, hypothesis generation and interpretation.

History is a discipline that is framed by chronology and geography, but it is not constrained or limited by them. It is not a collection of reminiscences or anecdotal chit-chat any more than it is a list of vacuous dates. Thinking in history means being literate within these frames and being capable of analysis, synthesis and case building (p. 157).

4.3.6 Historical thinking in different countries

While Martin (2007) showed how history texts written by historians are structured, Caroline Coffin (2006b) is doing work on the ways in which Australian learners write history (the realisation rules). Her background is also in Systemic Functional Grammar and thus her interest is in how learners develop control of subject specific forms of language and literacy. She argues that time and chronology are key concepts in history and her interest is in how learners frame these concepts in their writing. Coffin argues that, based on a genre analysis of a large body of history student writing

in Australia, there are three overall purposes of writing school history: first to record the past, second to explain the past and third to argue the past.

She suggests that while narratives are at the heart of studying English literature, 'history is concerned with the chronological ordering of past events and their historical (often social and political) significance' (Coffin, 2006a, p. 23). While the subject of English has as its aim developing learners' appreciation for literary works, a key purpose of school history is to develop students' ability to sequence and explain past events and in doing so, they develop a sense of their identity as individuals and members of a society.

Cullip's (2007) study of how the discourse of history works in the context of Malaysian junior secondary schools also uses the tools of systemic functional linguistics, but to analyse a widely-used history textbook, rather than learners' written work. History in Malaysia is compulsory and is considered of great importance for its role in promoting politically-constructed national aspirations. He argues that history texts move learners between stories of the past to accounts, reports and explanations of the past. However, the role of interpretation and argument are not central in the way that this is seen in Australian texts.

Halldén (1994) writes that history teaching in Swedish upper secondary school aims at structural explanations. A common method of instruction is the classroom conversation where students are presented with bits of information and the teacher tries to get them to draw conclusions about the circumstances of the event in question and to say what was likely to happen next. The purpose is to establish a line of reasoning that constitutes both a description and an explanation of the actual historical event. The point is not for students to develop their own explanations of a particular event, but to adopt the line of reasoning that is presented by the teacher. There does not appear to be an emphasis on reading original sources and synthesising one's own arguments.

In Canada, school history seems to be understood a little differently in different states. Recent work from Ontario authors (Twyman, McCleery, & Tindal, 2006) who are influenced by instructional design shows that their focus is on how concept-based

instruction can develop learners' content knowledge and their skills in writing problem-solving essays. They define general case historical thinking as the ability to analyse problems within time-stamped periods and generalize interpretations by articulating patterns of similarities and differences as well as cause and effect. They draw on Wineburg's (1991) concept of historical problem solving which begins with students being provided outcomes and working backwards to explain why various solutions happened. Here is an example of a problem solving exercise:

Below is a map of the English colonial regions. Pretend that it is now 1700 and all trade has stopped between the colonies and between the colonies and Europe. Think about how that stop in trade might affect the colonies. You must write a report evaluating which colonial regions, Middle Colonies or Southern Colonies, you believe would be most affected by this stop in trade (p. 339).

The emphasis here is on the student's ability to analyse the problem, to identify and use appropriate criteria to make a binary decision and defend it. This is different from the way that the genre theorists in Australia understand how history students are expected to use the concepts of time and chronology to record, explain and analyse the past.

Different states in the United States may have different purposes and perspectives on the learning of history. In his book VanSledright (2002) describes his action research project with Grade 5 students in a mid-Atlantic US state in which he focused on learning history through historiographical study and investigation. In an essay review, Lévesque (2005) describes how VanSledwright encouraged his students to use the craft of historians by investigating the causes of the American Revolution of 1776. Using a range of resources and several conflicting primary source accounts of the Stamp Act, the Boston Tea Party, the Boston Massacre, VanSledright attempts to develop in his 'overwhelmingly patriotic students historical empathy for people of different time and different allegiances and beliefs' (Lévesque, 2005, p. 351).

Thus from this small range of examples, we see that school history has different purposes and is practiced differently in different countries. Some countries like Sweden and Malaysia focus on students developing a particular line of reasoning, while it appears Australia values students' own interpretations of events. In Canada and the United States, there appears to be a focus on students both developing a body

of historical knowledge and on engaging with original source material and transforming these source texts to create new texts (Greene, 1994).

4.3.7 Teaching history in South African schools

Ideology

Government education authorities often and understandably use History in a school curriculum to present and promote a particular worldview, which is often linked to issues around nationalism. In his study of South African history textbooks from 1839 to 1990, Chernis (1990) writes that the history of history teaching illustrates the massive degree to which the state has attempted to influence or steer the objectives and nature of history as taught at school. The history curriculum plays a legitimatory function at different times. This is seen very clearly in the official history endorsed by the South African state during apartheid, which advocated a strong Afrikaner nationalism.

During the colonial and apartheid eras, the content of the curriculum in South African schools was biased towards a Eurocentric focus of the world. According to Chisholm (1981), the history that was taught was the heroic tale of the rise of the Afrikaner and the textbooks carried “several historical inaccuracies, omissions and misrepresentations”. Kros and Vadi (1993) argue that the teaching of history has been used and abused in the ideological control of South Africans of all races, particularly Africans. One reason for this is that historians subscribing to the so-called Afrikaner school of history have dominated the field.

A study of Geography, History, English and Afrikaans Literature secondary school textbooks in 1981 found that there were a number of ‘master symbols’ that appeared in these books (du Preez, 1983). Some of these that apply to the study of history are:

- Legitimate authority is not questioned.
- Whites are superior; blacks are inferior.
- The Afrikaner has a special relationship with God.
- South Africa rightfully belongs to the Afrikaner.

- The Afrikaner has a God-given task in Africa (p. 71).

Most textbooks reflected the Afrikaner nationalist paradigm. Steve Biko, the leader of the Black Consciousness Movement is quoted as saying:

The history of the black man in this country is most disappointing to read. It is presented as a long succession of defeats. The Xhosas were thieves who went to war for stolen property. The Boers never provoked the Xhosas but they went on 'punitive expeditions' to teach the thieves a lesson. Great nation builders such as King Shaka are cruel tyrants who frequently attacked smaller tribes for no reason but for some sadistic purposes... If we as blacks want to aid each other in our coming into consciousness, we have to rewrite our history...we have to destroy the myth that our history starts in 1652, the year Van Riebeeck landed at the Cape (History news, March 1983).

Pedagogy

It has been argued that the dominant approach to teaching history in South African schools has been teaching historical facts as truth or history as a body of knowledge, history in the 'great tradition'. Kros (1996, p. 4) describes that for the school history inspectors there 'was a set of quantifiable facts on the Eastern Frontier, for instance' and interpretation of these was superfluous. This approach was underpinned by the belief of nineteenth century historians that it was possible, by examining the evidence of the past, to arrive at historical truth (Mathews, 1992). Many teachers taught facts from prescribed books as if these were true, and education departments assessed history pupils to assess how many facts they knew (Sishi, 1995). This represents the worst extreme of the 'traditional' approach with a focus on rote learning, rather than on conceptual understanding of a coherent narrative.

This approach to history is strongly contested in the 1970s and 1980s with the rise of people's history, social history, revisionist history, Africanist history, socialist history and popular history (Kros & Vadi, 1993). In the 1980s and early 1990s there was a call from a group of mostly white academics that school history should focus on developing critical and independent thinking (Chisholm, 1981). The University of the Witwatersrand established the History Workshop which focused on 'people's history' or a 'history from below' (Krige & Witz, 1990). The first Social History Workshop was held at the University of the Witwatersrand in 1978. The first volume of *A*

People's History of South Africa was published (Callinicos, 1980) as a result of this workshop. This book told the history of the mineworkers, rather than the story of randlords.

In a similar vein, the National Education Executive Committee published a text called *What is history?* in 1987. This aimed to introduce a radically different approach to the study of history in South Africa by drawing selectively on the writings of South African neo-Marxists/revisionists and social historians (Krige, Taylor, & Vadi, 1992). The book is not content based but has selected historical events and personalities in order to afford the students a chance to work like an historian by giving them primary sources as evidence.

In the late 1970s, Peter Kallaway at the University of the Witwatersrand embraced the idea of source-based history as espoused by the Schools' Council Projects in England, which had been launched in 1974¹⁵. This approach had a strong focus on inducting children into the process of 'doing history' through dealing with evidence.

Some House of Assembly education departments (such as Natal, the Cape and Transvaal) started the shift away from history as a 'body of knowledge' to history as a 'mode of enquiry'. For example, Jeff Mathews, a Superintendent of Education in the Natal Education Department co-authored a book entitled: *Discover history: A pupil-centred approach to history method* (Mathews, 1992).

The Ad hoc Provincial History Committee for KwaZulu Natal issued a document called *History Guidelines Standard 8* (1995). According to the document,

The guidelines ... represent a new and exciting approach to the study of history. Teachers are urged to view the subject as one in which various versions of the past can be explored to put an end to the ideological domination of apartheid history. This means that history becomes a subject for open, critical debate...

Teachers are also encouraged to move away from the pure dissemination of facts in teaching history to a method of analysing the past through the application of skills and concepts. (p. i)

The document describes a skills-based approach in this way:

¹⁵ Pers. Comm., Dr Cynthia Kros, History Department, University of the Witwatersrand, August 2006.

It is an attempt to move away from the domination of facts in teaching history to a method of analysing the past through the application of skills and concepts. Skills acquired by pupils are based on reason and a ‘spirit of enquiry’ that involves the critical use of source material.

Shooter and Shuter (publishers in Pietermaritzburg) published a new series of textbooks, called *History Alive* in 1987, which included far more source-based activities (Morrell, 1990) than other textbooks at the time, which tended to be content-heavy. Thus it is clear that in some quarters, there was a shift to a skills-based history, which was still underpinned by a sufficiently detailed body of knowledge.¹⁶ However, this happened in a small minority of South African schools, and happened mostly within House of Assembly and House of Delegates Departments of Education, and not within the Department of Education and Training or the many ‘homeland’ Education Departments.

Content and/or skills

In the post-apartheid era, a skills-based approach to school history came to be presented as the panacea to the history ‘as compendium of facts’ approach. It may have been that the skills-based approach was supported because its purpose is to develop critical thinking, and critical thinking was necessary for learners to challenge the strong nationalism of the past. The skills-based approach also dovetailed well with the outcomes-based movement which dominated post-apartheid education reform. A false dichotomy is set up where school history is either content or it is skills. But skills cannot be taught in a knowledge vacuum. A skills-based method which is not located within a coherent set of historical concepts, can lead to students focusing on random historical events that are not situated in their context of space and time. Kros and Vadi argue that the British Schools’ Council Project was based on a skills approach with a ‘rather erratic and incoherent content’ (1993, p. 101).

To suggest that the selection of particular content is more or less arbitrary, that the real purpose of providing students with an account of a certain

¹⁶ Prof. Peter Kallaway acknowledged that a source-based approach was never envisaged to mean that no content was learned and only sources were read (Pers. comm. 27 October 2007).

historical episode is that it is illustrative of a general phenomenon [...] or that an historical extract may be presented to test various skills of literacy, is to eviscerate history. It deprives students of an understanding of how what may well be generalisable forces and processes come to function in particular ways at certain times (Ibid., pp. 100, 101).

It seems like the most useful pedagogic approach to using sources is within a strong conceptual body of knowledge, where understanding is strengthened through the interrogation of original evidence. The other key reason for using primary sources in the classroom is that it reveals to students how different historical ‘truths’ are made.

History is elusive. It comes to us via a complex process of sifting, sorting and selective presentation. It is probably unwise to plunge students into all of its complexities at once, but they must begin to understand how history is made; that its conclusions are fluid and open to debate and that it is not the closed book represented by the ponderous textbook of any political persuasion... (Kros, 1988, p. 98).

4.4 Conclusion

This chapter has described an epistemological shift that took place within the discipline of history in the twentieth century, from a positivist belief that it is possible to know the past as it was, to an idealist perspective that makes explicit the subjective role of the historian in interpreting evidence. From the perspective of sociology of knowledge, Bernstein suggests that history could be described as a horizontal knowledge structure within a vertical discourse. This means that its content does not have a strict vertical progression, but is characterised by a proliferation of different languages, or in the case of history, of different historiographies. Its specialisation comes from the procedures or ways of thinking that differentiate it from other disciplines. An historical gaze is about gaining mastery over both history content and mode of expression, which includes the procedural work of historians.

In the 1970s there was a shift in the meaning of school history in Britain from *knowing* history in the ‘great tradition’ to *doing* history. Learners were required to read and interpret historical evidence and to understand history not as something ‘given’ but as something constructed. This shift happened to some extent in some

South African schools lead by the work of the Wits History Project in the 1980s, but certainly did not penetrate the Department of Education and Training (DET) or the 'homelands' departments of Education.

The next chapter describes more specifically the policy changes in South African history curricula since 1990, and presents a detailed analysis and comparison of the Interim Core Syllabus (1996) and the National Curriculum Statement (Grades 10 – 12).

Chapter 5

The Official Recontextualising Field: the making of the FET History curriculum

5.1 Introduction

This chapter explores the questions of how and why the history FET curriculum came to look like it does. Who were the people involved in writing it and under what constraints did they work? Theoretically this work is located in the official recontextualising field (ORF) of the pedagogic device. Its concern is how the state and its agents recontextualise history knowledge from the field of production and legitimate what history should be taught in South African classrooms.

This chapter has two main sections. The first is a description of the development of the history curriculum in South Africa since 1990. This is important as the curriculum development processes that preceded it influenced the FET curriculum making process. The second section focuses on the process of the writing of the FET history curriculum, which is the specific curriculum pertinent to this study. It draws on data from interviews with six members of the subject writing team who designed the curriculum document. In writing what is essentially a history of curriculum development, I am aware that people are social actors who play different roles at different times. Sometimes a person is a commentator on the process, and sometimes plays an active role in the process. Given the space constraints of the study, this is a partial view.

The following figure shows how both Chapter 5 and Chapter 6 are located in the ORF of the pedagogic device.

Figure 9: The pedagogic device and this chapter

(Form of regulation) Field of practice	Processes	Typical agents	This study
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Academics,	Knowledge structure and procedures of history (Chap 4).
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum writers	Processes of making the History NCS (Chap 5). An analysis of the changes in the history curriculum (1996 and 2003) (Chap 6).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.	Teacher trainers and writers of textbooks.	A description of a provincial teacher-training workshop and a description of how selected textbook writers and publishers understand their work (Chap 7).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Teachers	An analysis of pedagogic practice in three Grade 10 history classrooms in 2005 and 2006 (Chap 8). An analysis of assessment tasks (Chap 9). Teachers' perceptions of the new curriculum (Chap 10)

5.2 The development of the History curriculum in South Africa 1990 – 2002

Chapter 4 provides a broader discussion of the wider issues and debates around content and pedagogy in the learning of history in South African schools, and chapter 6 presents an analysis of the FET National Curriculum Statement. This section of this chapter focuses specifically on the development of the history curriculum since the early 1990s.

It describes 'apartheid state' curriculum processes between 1990 and 1994, as well as the processes that took place after 1994 when the new democratically elected state came to power. Writers such as Chisholm (2005) and Fataar (2006) have described three iterations or waves of curriculum policy in South Africa since 1994. The first was a 'cleansing' process (which resulted in 'cleansed' syllabi that were called the Interim Core syllabus documents), the second was the process that produced Curriculum 2005 between 1995 and mid 1997, and the third was the Ministerial review process that led to the revision of C2005 and the writing of the Revised National Curriculum Statements (2000 – 2003).

There are a number of accounts of curriculum change in South Africa since the 1990s. Kraak (1999) examines the competing discourses in education policy which led to the rise of the unit standards framework and the NQF (P. Christie, 1997); Jansen (1999a; 1999b) and Fataar (2006) have provided detailed accounts of the development of Curriculum 2005, and Chisholm (2002; 2005) has provided insider accounts of the processes of the curriculum review. In the area of adult education and training, Aitchison (2003) has explored some of the history and agents active in the arena of adult and basic education since the 1990s. With regards to the history curriculum specifically, Seleti (1997) provides an account of the disappearance of history in the original version of C2005 and Chisholm (2004) describes its reappearance in the Revised National Curriculum.

Ball (2005) critiques policy research that is ahistorical and lacks any sense of time. The purpose of this chapter, together with Chapter 1, is to situate the making of the FET history curriculum in a particular time and place. This chapter focuses the debate very closely on the development of the history curriculum, rather than on the underlying principles of outcomes and knowledge integration which are taken as given. It is concerned with how the FET history curriculum document, in particular, came to look like it does.

5.2.1 Developments in the history curriculum from 1990 – 1994

Until 1990, the apartheid state in South Africa managed a centralised curriculum policy system. In 1990 there were a number of political changes including the release of political prisoners and the unbanning of political organisations. The emergence of a democratic state seemed inevitable and it was a critical turning point for curriculum debates as an alliance of progressive education and labour stakeholders initiated the National Education Policy Investigation (NEPI) to develop policy options for the broad democratic movement (Jansen, 1999b). The private sector, non-governmental organisations and the apartheid state also developed new curriculum models at this time.

In the same period when various stakeholders were planning broad curriculum positions, there was a lot of intellectual work happening around the development of the school history curriculum. There were curriculum processes happening in the official state realm, as well as in the alternative grouping of white English-speaking academics (who described themselves as 'Left'). The state's research arm, the Human Sciences Research Council (HSRC) started an investigation into history teaching in 1988 and two years later, the Department of National Education started the review of the core syllabi being used in the country (Lowry, 1995).

Academics and teachers from the Left, the Wits History Project and the National Education Co-ordinating Committee (NECC), were promoting a revisionist historiography and a People's History as a counter to the racist and elitist history propagated by successive apartheid regimes (Wright, 1988/9). They also promoted a skills-based history to develop critical thinking and the distinctive methodology of historians. Within this group, there were debates about what is 'People's History for People's Power' and how this would influence the content of a history curriculum in a post-apartheid South Africa (Krige et al., 1992, p. 19).

In 1992, three conferences were hosted by the History Education Group¹⁷ to promote debate about a new history curriculum. These were attended by teachers, academics and people from a range of political and educational perspectives (History Education Group, 1993). At these conferences, the concerns expressed about the History curriculum included the length and overloading of the syllabus, their repetitive nature, the disjunction between primary and high school curricula, the strong Eurocentric nature, and the inadequate focus on the history of black South Africans (History Education Group 1993, p. 7).

In the official camp was the state-appointed Human Sciences Research Council (HSRC) committee who in 1991 published a report entitled *An investigation into the teaching of history in secondary schools in South Africa* (van der Merwe, Vermaak, & Lombard, 1991). The investigation was led by Professors H.H. Trumpelmann (Rand Afrikaans University) and P.H. Kapp (Stellenbosch) and included an illustrative syllabus. Rob Siebörger (from the History Education Group and UCT) and Peter Kallaway (from Wits History Workshop and Wits Department of History), who were also on the committee, disassociated themselves from the content of this syllabus (Krige et al., 1992). Kallaway noted that the skills-based methodology that had previously been embraced by the Left, was now also acceptable to the Afrikaner HSRC commissioners (Ibid.).

The History Education Group did not receive this report kindly, questioning the representivity of the process, the historiographical approaches which informed it and its focus on community-oriented history. Kros and Vadi (1993) believed that it was an untimely intervention written by ‘reborn’ Afrikaner historians and suggest a number of problems that they have with the ‘reformist’ approach to the history curriculum. Ultimately the ‘illustrative’ syllabus that was included in the HSRC report was never implemented.

¹⁷ The booklet produced to document these three conferences notes that a meeting of history educationalists at the Kenton Education Conference in 1991 proposed that these history curriculum conferences should be held. The History Education Group comprised Jean Bottaro (teacher), David Hiscock (teacher), Barbara Johannesson (SACHED), Peter Kallaway, Sue Krige, Cynthia Kros (all from the University of the Witwatersrand), Robert Morrell, John Pampallis, Yonah Seleti (all from University of Natal, Durban) and Rob Siebörger (University of Cape Town).

The old Core Syllabus Committee for Social and Human Sciences controlled by the Department of National Education mounted a 'situational analysis' between 1990 and 1994. The history sub-committee were all men, and four of the eight men were white. They had sent out a questionnaire to individuals and organisations to investigate attitudes to the teaching of the humanities at school. On the basis of responses which were unrepresentative, this 'tiny, unrepresentative committee presumed to draw up a mission statement and objectives for history' (Kros, 1996, p. 7). In February 1994, an *ad hoc* group loosely connected to the Centre for Education and Policy Development (CEPD) and led by Mary Metcalfe (later to become the MEC for Education in Gauteng) persuaded the Core Syllabus Committees to be more open about the work they had been doing. While some committees were open to suggestions, the history sub-committee appeared more defensive.

5.2.2 The curriculum 'cleansing' process, 1994

The CEPD group challenged the legitimacy of this curriculum development process. It was agreed that the participants would wait for the more democratic curriculum review process that was to be inaugurated by the National Education and Training Forum (NETF). When the democratic government took power in 1994, they were faced with a difficult situation as far as the curriculum was concerned. There was clearly a need to develop new curricula in a democratic fashion, which would take time. In the meantime, the old syllabi were unacceptable and could not be allowed to continue unchanged (Seleti, 1997). Thus the first phase of curriculum reform was to cleanse these syllabi of any clearly sexist and racist content, to eliminate inaccuracies in subject content and to establish a common core curriculum (Jansen, 1999a). The Department of Education chose the NETF as a partner in this 'cleansing' and reviewing process as a means of legitimising the process. The NETF had been created in 1993 as a bargaining forum for all stakeholders in education (Patel, 1998; Seleti, 1997) and as a forum representative of diverse interests and political sentiments to find solutions for the most immediate problems in education (Kros, 1996).

Kros (1996) reports that the subsequent NETF history subcommittee comprised representatives from various teacher unions, the Congress of South African Students (COSAS) as well as two members from the original Core Syllabus Committee. Each subject committee consisted of representatives from eight organisations, however there was concern that there were no professional historians and school teachers on the committee (Seleti, 1997). Seleti felt that the marginalisation of history educators from this process was not a conspiracy, but due to history educators not being a visible group with a demonstrable constituency (1997, p. 13).

Kros' perspective is that the committee ended up 'trading bits of South African history' while the 'fundamental issues were not examined' (Kros, 1996, pp. 8, 9). Many issues around methodological approaches, assessment, teacher training and history's role in developing values such as non-racism, non-sexism, democracy, mutual respect were set aside, as they were judged not to meet the Minister's brief. Dr Kriel (who worked for the governmental Department of Education) was entrusted with ensuring that the sub-committee's report went through the correct procedures before being gazetted. It became clear the changes made by the sub-committee were in fact not incorporated into the syllabuses, which were gazetted at the end of 1994. A committee of enquiry was set up to investigate this, which found a number of misunderstandings had occurred, and portrayed Dr Kriel as having to serve two masters - the NETF sub-committee and a senior bureaucrat.

Kros (1996) contends that the history syllabuses that came out of this process (called the Interim Core Syllabuses) were still fragmented, and still overloaded with content. Seleti (1997) also comments that a number of letters and articles appeared in the press which protested against the process and the content of the new syllabi. It was felt that they still tell the story of the elites and there is very little social history. Kros comments that the historian Grundlingh perceived very little fundamental change from the first Nationalist History syllabus issued in 1957 (Kros, 1996, p. 10). She suggests that the interim history curriculum was devised in an exclusive and unhealthy atmosphere and that the process

was tainted from the beginning. Others have also criticised the process for not being transparent and that participation was limited (Patel, 1998).

In the FET phase the Interim Core Syllabus has been used in Grade 10, 11 and 12 classrooms since 1995. They have been replaced by the National Curriculum Statements (Grades 10 –12), which was implemented in Grade 10 in 2006, in Grade 11 in 2007 and in Grade 12 in 2008.

5.2.3 The development of Curriculum 2005 (1997)

Once the Interim Core Syllabus documents were in place, the process of sustained curriculum development could begin. The process of developing Curriculum 2005 for the General Education and Training (GET) band began in October 1996 with the naming of the National Curriculum Development Committee. This Committee appointed Learning Area Committees to begin developing curriculum documents within each of the learning areas. The stakeholder principle operated hierarchically, where the primary stakeholders were representatives of the national and provincial department of education, the secondary stakeholders were the teacher organisations (who had two members each) and the third category were NGOs, professional association, universities and technikons, with one representative each (Siebörger, 1997). History fell under the Human and Social Sciences Learning Area.

These LACs had to shift away from content-based syllabi and work within the framework created by outcomes-based education and the National Qualifications Framework. A member of this Committee said that the Committee was told not to think in terms of existing subjects but to envisage a new thing called Human and Social Science, and not to include any content in the curriculum¹⁸. This process of curriculum development took place under very tight timeframes, which were increasingly politically driven (Seleti 1997, Jansen 1999). At the end of the C2005 process, a small Technical Committee was

¹⁸ Pers comm., Prof. R. Siebörger, University of Cape Town, February 2005.

established to reduce the plethora of outcomes and assessment standards generated by the LACs to manageable proportions (Seleti, 1997).

Fataar (2006) argues that this curriculum development process was dominated by people allied to the South African Democratic Teachers Union (SADTU), who were fully supportive of the integration agenda, which led to the adoption of integrated learning areas. Thus history as a discrete subject disappeared in the Curriculum 2005 documents, which were released in 1997. The Human and Social Sciences (HSS) learning area combined the underlying concepts of time and space, relationship and change into nine learning outcomes. Only one of the nine outcomes for the HSS was exclusive to History. The argument of those in favour of integration was that history should be taught in an inter-disciplinary way. Seleti (1997) criticized this move, commenting ‘it is not educationally, intellectually or politically correct to deny specialization at senior levels of the GET and in the FET’ (p. 60).

Content was never specified in C2005. Thus it is difficult to see how the ideology of history changed from the apartheid curriculum to the new democratic curriculum embodied in C2005. An outcome such as ‘appreciating the richness of national and cultural heritages’ could be reached through content which glorifies a narrow Afrikaner nationalism or through content which valorises a militant ethnic Africanism (Jansen, 1999d, p. 152). Content matters, and apartheid type history would continue to be taught unless teachers were given an alternative. It is striking that the key debates within the History Group and the NETF curriculum process in the late 1980s and the early 1990s were around issues of content, and *what* history should be taught, but when C2005 was produced, content had simply disappeared! Chisholm (2004) argues that the oppositional discourses of ‘people’s education’ that framed the 1980s and early 1990s were overtaken by the outcomes discourse that emerged in the late 1990s.

The South African Historical Society commented on the implications of C2005 for history teaching, saying that history needs to be studied within a context of the past and the design of C2005 make it difficult for history to be learned in a coherent way (South

African Historical Society, 1998). The Society was also concerned that C2005 presented the concept of identity as fixed and historically unchanging, in the same traditional South African way that communities have always been understood. There was also a concern that key historical knowledge was not specified and that the same historical knowledge could be repeated year after year. While C2005 did aim to develop learners' historical skills, the Society argued that these skills couldn't be successfully achieved outside a coherent historical context that is lacking in the documents.

5.2.4 The Curriculum Review process (2000)

The lack of specified content in all learning areas, not only in history, was a major criticism of C2005 along with concerns about curriculum jargon that was difficult to understand, poor teacher training, insufficient learning materials to support the new curriculum and rushed time frames for implementation. In the light of these concerns, the new Minister of Education (Prof Kader Asmal) established a Review Committee, headed by Professor Linda Chisholm, to review C2005 in February 2000. The Review Committee was tasked to provide recommendations on implementation of C2005 in Grade 4 and 8 in 2001, key factors and strategies for a strengthened implementation of the new curriculum, the structure of the new curriculum and the level of understanding of outcomes-based education (Department of Education, 2000b).

This Committee found that the implementation of C2005 had been confounded by, amongst others, a skewed curriculum structure and design which was under-specified in terms of content and progression, lack of alignment between curriculum and assessment policy, inadequate teacher development, and problems with learner support material. It recommended that the curriculum be revised and streamlined to 'promote integration and conceptual coherence' and be written in clear language. Thus a new curriculum development process began in 2001, which culminated in the Revised National Curriculum Statements (RNCS) for the GET phase.

History was not at the centre of first wave of curriculum reform, but this was to change when Professor Kader Asmal took over as Minister of Education in 1999 (Chisholm, 2004). Asmal had studied to be a teacher and was later a law scholar. He taught law both in Ireland and South Africa. He is passionate about the teaching of history and about the humanities in general.¹⁹ At the same time as the C2005 Review Committee was working (February – May 2000), Minister Asmal commissioned Wilmot James to assemble a group of diverse thinkers to produce a document on values, education and democracy. The report from this Working Group was titled *Values, education and democracy*, and was produced in mid-2000. This report called for the establishment of a panel of historians and archaeologists to advise the Minister on how best to strengthen the teaching of history in South African schools.

The History and Archaeology Panel of the Values in Education Initiative was established by the Minister and launched on 12 September 2000. Prof Njabulo Ndebele, a professor of literature, and the Vice Chancellor of the University of Cape Town, chaired the Panel. It was required to undertake a critical analysis of the teaching of history and evolution in schools, the state of teacher training and the quality of support materials, and to make recommendations on how to strengthen these three areas. The report was submitted on December 4, 2000 (Department of Education, 2000a).

At the time that the History and Archaeology Panel was meeting (September – December 2000), the Review of Curriculum 2005 had already recommended that the subjects of History and Geography be addressed separately within the Social Sciences Learning Area, and the Panel's Report endorsed this recommendation. In terms of history content, both the Review Committee and the History and Archaeology Panel felt that the neglect of content meant that the ideology of apartheid may not be challenged at all, and that teachers would simply continue teach what they knew best (Chisholm, 2004). The Panel also recommended that History be taught as an independent disciplinary subject at the FET level. Recommendations about the content of the curriculum were that it should

¹⁹ In a plenary address at the South African Society for History Teaching on 21 September 2007, Asmal said that the humanities are very important for developing the intellectuals of a society.

include the study of post-1973 South African history, and resist an urban bias by including rural and agrarian studies. It also recommended that content should be framed thematically rather than chronologically. There should be a coherent, incremental link between the GET and FET phase (Department of Education, 2000a).

The Panel also recommended that there needed to be a strong focus on rebuilding the weakened history teacher training capacity and on raising the proficiencies and enlarging the role of the History Subject Advisors. A final strategic proposal was for the establishment of a National History Commission whose major purpose would be to explore ways of strengthening the teaching of history in schools, and addressing the systemic crisis around history provision.

In the RNCS, History and Geography, although both falling under the Social Science learning area, are once more seen as distinct subjects with their own learning outcomes and content. Chisholm (2005) comments that there was a distinct movement to reinsert history more strongly into the curriculum. An organised history profession and a Minister of Education who was sympathetic to this constituency supported this movement²⁰. The movement to reinsert history did not go unchallenged and there were continuing debates about whether history should have its own space at all, as well as whether content should be brought back, since content was associated with a rote learning and authoritarian approach. However, the final RNCS Grades 0 – 9 gives History and Geography their own distinct outcomes and content areas, with aims that are very different from the apartheid syllabi. Content is to be taught through the development of skills, knowledge and understanding, and the key desired outcomes are enquiry, interpretation, knowledge and understanding (Chisholm, 2004).

The Report of the History and Archaeology Panel was presented for discussion at a national conference on “Values, education and democracy” which was held in February

²⁰ In a speech at the launch of the South African History Project (27 August 2001), Prof Kader Asmal noted “Conflating history with geography in a generalized field of human and social sciences has compromised its unique disciplinary virtues and seriously eroded its status.”

2001. A report called the *Manifesto on values, education, and democracy* was published in August 2001. It drew on public debate and submissions to the earlier *Values, education and democracy* report, as well as the proceedings of this conference. This manifesto outlines sixteen strategies for instilling democratic values in young South Africans. One of these strategies focuses specifically on history. The manifesto states:

Putting history back into the curriculum is a means of nurturing critical inquiry and forming an historical consciousness. A critical knowledge of history it argues, is essential in building the dignity of human values within an informed awareness of the past, preventing amnesia, checking triumphalism, opposing a manipulative or instrumental use of the past, and providing a buffer against the ‘dumbing down’ of the citizenry (James, 2001, p. vi).

In the same month that the Manifesto was published, the Minister launched the South African History Project, as a response of the recommendation of the *Report of the History and Archaeology Panel* to establish a National History Commission. In his opening speech, Prof Asmal argued that history is vital for reminding us that any future has to be based on a sound awareness of the role of the past. He said that the role of the South African History Project (SAHP) is to promote and enhance the conditions and status of the learning and teaching of history in the South African schooling system, with the goal of restoring its material position and intellectual purchase in the classroom. The purpose of the SAHP was to engage with processes of curriculum development and a through review, revision and rewriting of textbooks. He announced that a 12-member Ministerial Committee had been appointed to oversee the project²¹. The SAHP was established through funding of \$500 000 from the Carnegie Corporation (Asmal, 2001).

The SAHP project was dissolved when a new Minister of Education, Naledi Pandor took charge of the Ministry in 2004. Although the SAHP was only set up for a certain life span, it would have continued for as long as Minister Asmal remained in office because the Project had not completed its major tasks²². As will be seen later, the SAHP played a key role in the development of the FET History curriculum.

²¹ Most of the members of the Ministerial Committee were professional historians, but the CEO was Ms June Bam, a history curriculum specialist. According to Linda Chisholm (pers. comm. November 2007), Bam was excluded and Yonah Seleti took over as CEO.

²² Pers. Comm., Prof Yonah Seleti, CEO of the SAHP Ministerial Committee, 13 July 2005.

5.3 The FET curriculum writing process

In this section, I turn to the making of the History FET NCS. The data are the transcripts of semi-structured interviews with six people who were involved in the writing of the curriculum, as well as an analysis of the National Curriculum Statement for History and other public documents. The account attempts to highlight the differences and tensions that emerged during the writing process, and to capture how the writing group saw the focus and purpose of the curriculum document. It also explores the networks of influence that become visible in history curriculum policy making.

5.3.1 Who makes the curriculum?

We have seen that the curriculum development process was strongly centralized in the apartheid era and was placed in the hands of departmental officials and academics from specific universities. The first two waves of post-1994 curriculum making (the NETF ‘cleansing’ process and the development of C2005) were more democratic and representative, including representatives from teacher unions and student organizations (Jansen, 1999a). In the C2005 process, officials from the national and provincial departments still had the greatest representation and representation from NGOs and higher education institutions was small. However it was clear that these processes were terribly unwieldy: many ‘stakeholders’ lacked expertise in curriculum development processes and they had insufficient time to consult with their constituencies (Fataar, 1999; Siebörger, 1997). In the end, a small Technical Committee was set the task of rationalizing and organizing all the work produced by the LACs.

Fataar (2006) suggests that policy networks, which are made up of extra state groups and individuals crucial to government functioning, are crucial to curriculum making. ‘Governments come to depend on these networks to produce the knowledge and policy positions’ (p. 643). He suggests that a labour-led policy network, whose curriculum and epistemological interests were subservient to their political interests, dominated the initial

curriculum making processes. It was imperative to collapse the boundaries across subjects and between everyday and school knowledge in a bid to democratize and transform the education system, which was seen as elite and too academic. The NQF's focus on unit standards influenced C2005 with a preference for narrow outcomes with detailed range statements and assessment criteria.

There were on-going critiques of C2005 as it was implemented in schools from 1998 and when a new Minister of Education took office in 1999, he set up a committee to review C2005. Fataar (2006) argues that the review of C2005 came to be dominated by an academic policy network 'which mobilized knowledge and research to gain its ascendancy' (p. 650). He writes that this academic policy network was drawn from the Education Faculties of liberal English speaking universities, and in particular a subgroup who had interrogated the theoretical work of Basil Bernstein in 'rather select fora' (p. 652). Bernstein's distinction between hierarchical and vertical knowledge structures was used as a key conceptual critique of C2005, which the Review committee argued emphasized everyday knowledge at the expense of formal school knowledge (Department of Education, 2000b).

The recommendations of the Review Committee led to a reworking of C2005. A new curriculum process developed the Revised National Curriculum Statements for the GET band in 2001. In contrast to C2005, which was widely representative, the DoE insisted that the positions on the revised GET curriculum process were advertised. Each working group consisted of 50% governmental representatives and 50% non-governmental representatives. Participants were invited to apply to be part of the curriculum writing team and were selected according to criteria based on knowledge and experience as well as the need to achieve racial, gender and regional representation (Chisholm, 2005).²³

²³ The GET Social Sciences writing group was co-ordinated June Bam. The history group comprised Peter Lekgoathi (Wits), S. Seethal (Deputy Principal, KZN), Emilia Potenza (writer), Gail Weldon (Western Cape Department of Education), Pauline Patel (North West) and Selina Ntombizodwa (N. Cape).

The curriculum review at the GET level also influenced the FET curriculum work. The DoE had already begun developing the curriculum for Grades 10 -12, a process called Review and Modernisation. This process was put aside and overtaken by the Review-informed process of developing National Curriculum Statements at FET level in 2002.

A Ministerial Project Committee appointed by the Minister of Education, Prof Kader Asmal oversaw the writing of the National Curriculum Statements Grades 10 – 12 (Schools). This Project Committee consisted of members of the National Department of Education and externally-based experts for the various fields, such as Mathematical Sciences, Human Sciences, Languages etc. The Minister appointed a Reference Group to act as critical friends in the Development of the NCS Grades 10 – 12 (schools). This was a large stakeholder group of 48 people. Nine people were from provincial education departments, seven were from other national departments, three were from teacher unions, three represented higher education and the remainder were from organizations such as the Publishers Association of South Africa, the independent Examinations Board, Umalusi, the Gender Commission or from subject associations such as the SA Society for History Teaching, the SA Association for Language Teaching, the Association for Mathematics Educators of South Africa etc.

Subject Working Groups were the primary developers of the different subject statements. These groups tended to comprise approximately eight members. According to the NCS Draft document ‘Some members were directly appointed on the basis of their expertise in a particular subject’. It does not make clear what other criteria were used to appoint the other members.

Appendix 1 of the Draft NCS Grades 10 -12 (schools) lists six people²⁴ as being members of the History Subject Working Group. I interviewed four of these people, as well as the Department of Education representative and Human Sciences Field Expert who was a

²⁴ Ms C Dyer (South African History Project), Ms G. Weldon (Convenor) (SAHP), Dr Z.M. Shamase (KZN Education Department) Mr D. Legoete (SADTU), Ms. M. Sangoni (SAHP), Mr W. Alexander (Northern Cape Education Department).

member of the Ministerial Project Committee. The writing group was made up of six people, three of whom represented the constituency of the South African History Project. Of the other three members, one represented the South African Democratic Teachers Union, one represented the KwaZulu-Natal Education Department and one represented the Northern Cape Education Department. It appears that the SADTU representative left the writing group before the curriculum was completed. There was also a Department of Education Co-ordinator whose role was to provide professional expertise and logistical support. The History writing group represented a narrower set of constituencies than the other subject writing groups, in that there was no representative from a non-governmental organization or from higher education. A higher education representative was appointed, but was not replaced when she did not attend.

Certainly the make up of curriculum development groupings has changed considerably since the early 90s. Kros (1996) relates that the Department of National Education's Core Syllabus Committee for Social and Human Sciences, which worked between 1990 and 1994, had a history sub-committee that comprised eight men, half of whom were white. Three were academics from Universities. In 2002, the FET subject working group for history comprised three women and four men. Of the seven members, two were white. One of these members, and the Human Sciences Field Expert has a PhD in History, but were not working as University-based academics. Most of the members had experience as history teachers in schools or colleges.

Regarding to how the history working group was chosen, one respondent said

we were looking at issues of representivity... in gender issues, also issues of race and stakeholder representivity, and you know, issues of experience, um, we had people who, most of them had taught history and, er, most people were part of the South African History Project... (Respondent 5).

The process of developing the curriculum took place over approximately 18 months in 2002 and 2003. Members of all the subject writing groups initially met to discuss the concept document which set out the guidelines for the curriculum development process. The subjects that made up the field of Human Sciences (Geography, History and Life

Orientation) initially met together and then separated into subject writing groups. The writing group would meet together for a week for discussions, and then be given various tasks to do. Each subject working group had a convener who would also meet together to be informed of the decisions of the Ministerial Project Committee.

The making of any national curriculum is essentially a process controlled by the state through its Ministry of Education. Thus it is a strongly externally framed process, where the locus of control is located external to the classroom teacher, although she obviously has agency in interpreting it in her classroom. The development of a national curriculum can never be a fully democratic process. As Bernstein said in a video interview shortly before he died:

As far as democracy, I never can understand how we continue to talk about democracy in education. We need to do our best to put them in separate sentences. I mean, education is a state-generated activity and any attempt to make changes in the system can only be done with approval, in the end, of the State and its various agents and agencies. The State has now put all education in a very tight box, through announcing hundreds and hundreds of targets for institutions to reach. It basically can control both input and output (Bernstein, 2001, p. 382).

5.3.2 External guidelines given to the History Subject Working Group

According to the interviewees, the guidelines from the Department were contained in a concept document that outlined the OBE principles of the curriculum. The underpinning principle of OBE was not up for discussion, it was taken for granted that the outcomes would lead the process of curriculum development. There was a Cross-curricular working group for Human Rights, Inclusivity and HIV/AIDS that looked at the work of the various subject writing groups to ensure that they were complying with these stipulations. In terms of the regulative discourse, it was clear that the curriculum should adhere to the principles of social justice, promoting indigenous knowledge as well as the Constitutional values of non-sexism and non-racism. The group used the Constitution as a framework for the values ‘that must be pushed’.

The other guideline was that the FET curriculum should follow on from the General Education and Training (GET) curriculum (Grades R – 9) which was completed in 2002. Thus the curriculum writing process was strongly externally framed with regards to the General Regulative Discourse. The General Instructional Discourse was also strongly externally framed, as the organization of the curriculum around learning outcomes and assessment standards was non-negotiable.

We were informed that issues of social justice should be there; indigenous knowledge should be there...like Africa should be foregrounded in whatever we are writing about. And then we must also ensure that the issues of gender, the issues of youth, the issues of women are part of the curriculum. So those are some of the guidelines that we were given (Respondent 1).

One of the principles in the concept paper was that we should try to drive the process from the point of view of the outcomes and we tried to stick to that (Respondent 6).

The other external guideline given was that the FET curriculum had to both link with the GET curriculum and it had to be valid in terms of being accepted by higher education institutions.

The FET ran far more smoothly in many ways, because a lot of the sort of bugs had been ironed out in the GET, you know the outcomes had been accepted, so in a sense they were ok with the approach of the GET... (Respondent 2).

One respondent felt that a departure point for the history curriculum was the History and Archeological Report (Department of Education, 2000a) which pointed out the direction in which history should go. However, another felt that this report did not influence their work very much. There was also work that had been done in the South African History Project which had addressed the issue of the school curriculum. A number of the members of the working group had been involved in writing history textbooks, and especially textbooks for OBE so 'quite a number of people had experience with the curriculum from different perspectives' (Respondent 6).

5.3.3 Agreements and consensus

At least one of the respondents felt that the process of writing proceeded fairly smoothly, saying that the history group was one of the few groups where there were not too many delays.

Once we has established the, sort of, the key elements of posing questions, and the learning outcomes, actually, and the principal sort of organizing principle, that it was South Africa in Africa, and the world. The rest of it kind of fell into place (Respondent 4).

Outcomes

While most interviewees felt that decisions about the learning outcomes were not that difficult, one disagreed.

Interviewer: In terms of the process of writing the outcomes, was that a fairly a simple process?

Respondent: Oh, it was not. There was a lot of fighting there! ... There were times when we could not agree at all, and they'd walk out – they'd walk out somewhere in some sessions. But in the end we found some understanding. Ja, it was not an easy process. But we succeeded, and then we'd strike a compromise (Respondent 3).

The other members felt that the outcomes were not difficult to agree on, as the group simply built on and extended the three History learning outcomes from the GET Social Sciences Learning Area. The outcomes are described in the table below.

Table 6: Learning Outcomes of the GET and FET History Curriculum Statements

	Grades R – 9	Grade 10 -12
LO 1	Historical Enquiry The learner will be able to use enquiry skills to investigate the past and the present	Enquiry Skills (Practical competence) The learner will be able to acquire and apply historical enquiry skills.
LO 2	Historical knowledge and understanding The learner will be able to demonstrate historical knowledge and understanding.	Historical Concepts (Foundational Competence) The learner is able to use historical concepts in order to analyse the past
LO 3	Historical interpretation The learner will be able to interpret aspects of history.	Knowledge Construction and Communication (Reflexive competence) The learner is able to construct and communicate historical knowledge and understanding.
LO 4	NA	Heritage (Reflexive competence) The learner is able to engage critically with issues around heritage.

The FET curriculum introduces a fourth outcome called “Heritage” that is different from the first three outcomes in that it does not reflect the process by which historians and learners investigate the past, but rather ‘engages learners with issues around heritage and raises crucial questions of analysis interpretation and presentation’ (Department of Education, 2003 , p. 11). According to one interviewee, this outcome was seen to be important in that it reflected an increased worldwide focus on heritage and it enables history to be linked to the everyday.

It teaches them to see history in the broader sense, that history’s not just what is in books, that history is actually in every building, every entity. And trying to bridge the gap, to make it sort of more active, something that’s going – to see around them in their everyday lives (Respondent 2).

It was not a co-incidence, not an accident; it was a deliberate calculation so that we could respond to the History and Archaeology report and also from our own experiences. How do we make this subject practical and more down-to-earth? (Respondent 6).

That outcome is crucial in the sense that it starts to deal with history as people engage with it, as the public engages with it. Because history plays itself out in the public domain. People use and abuse history in the public domain, in terms of your, the heritage of Afrikanerism, you know, the Voortrekker Monument, you know, it's intensely rooted in history... (Respondent 5).

Initially the group felt that the issue of heritage could be dealt with under the other three outcomes, but at the end it became its own outcome. One interviewee said that Kader Asmal demanded that paleontology and archaeology were in the curriculum as a result of the Values in Education report, and the Human Genome Project, which was led by Wilmot James, a social scientist from the HSRC.

...we didn't know where to put it. Because he [Asmal] demanded that it was in there somewhere, it got put into that place there [into LO 4] (Respondent 2).

The working group was also influenced by the curriculum development work that was happening in Britain. One respondent described working closely with a university in Scotland as 'that's where the most progressive History development as been happening, you know, as far as I'm concerned' (Respondent 2). This is unsurprising, as progressive history teaching in South Africa has been influenced by developments in Britain since the 1980s (see Chapter 4).

The interviewees generally agreed on the problems of the previous syllabus. It celebrated the 'great white man' narrative, it was party political, it was written from the ruler's point of view, it offered an uncritical view of the past, it was Eurocentric, it was the story of Afrikaner nationalism, it gave a view of South Africa as separate from the world and it was dominated by a content approach which had no or little focus on skills. The content was concerned with the present, current history and did not go back much in time.

Values

The writing group was agreed on the principle of phrasing the content as questions and making the values explicit.

So we wanted to promote the concept of history as questioning, as controversial, ja. Not with ready answers (Respondent 1).

We decided to pose questions rather than write it out, let's pose questions, and its only in history that the content is posed in terms of questions, and I think it helped us, because we can say "what was the world like in 1450?" and it's an open question...And then the debate was: Is this question open enough? Or is it too closed? Do we cover sufficient breadth by posing this question? (Respondent 6).

Within many of these questions is an implicit value judgment, for example 'What was the link between the Atlantic slave trade and racism?' It is clear that the curriculum wants teachers to identify the link between racism and the slave trade and to make such a link explicit to their learners. In other words, slavery should not be taught in a factual, neutral way, rather learners must confront the moral and value-laden import of slavery. It appeared that the writing team agreed upon this focus on values, this was summed up succinctly in this response:

It is after all a human rights curriculum (Respondent 4).

There is no other subject that is so suited to take the constitutional values as we were looking at them, and make them workable...so we use the constitution as a guide for the values that must be pushed and one of them was non-sexism, non-racism and a multi-cultural society (Respondent 6).

In the previous Interim Core Syllabus, half the school year was spent on South African history, and the other half on general history. In the NCS, the content is arranged in themes. This picks up on a recommendation by the History and Archaeology report to arrange the content thematically, rather than chronologically. So for example, when looking at the theme of slaving systems, South Africa is seen as one exemplar of this. This was done in order to move away from being narrow, to add a comparative framework and to provide a basis for transforming and re-orienting teachers' thinking.

One respondent gave the example of the Middle East, saying that it should not be approached in a chronological way of what happened when, but the key issue must be

‘people fighting for the right to exist, and other people fighting for their land to be recognized or for themselves to be recognized in their own land’.

5.3.4 Tensions and contestations

Epistemology

Three of the interviewees mentioned that the first set of tensions arose at the very first meeting of the group. This difference was a fundamental one of epistemology, of how one understands the nature of history - as a science or as a set of interpretations. (These epistemological issues are described in Chapter 4). For these three members of the group, it was a ‘non-debate’ or a ‘dead debate’ and they had simply assumed that everyone in the writing group would have had an interpretive perspective, but this was not the case. But as it was fundamental to the curriculum, this issue had to be worked through.

That was quite contentious, you know, but that was crucial in the sense that it created a foundation for discussing those historical issues. Once we had settled those issues then we could move forward (Respondent 5).

A scientific experiment can be repeated, but history, a historical event happens once, you can’t repeat it. ... But history in this context means that it is scientific in the sense that you are using scientific methods in writing history (Respondent 3).

Choices about content

While C2005 had not stipulated any content, the Review Committee had made it clear that the revised curriculum statements needed to provide much more guidance regarding what content to teach. The National Curriculum Statements for the FET phase (released in 2003), do not follow the integrated approach of the GET curriculum’s learning areas, but rather present subjects as separate and distinct. The history National Curriculum Statements developed as a result of the Review process have reinserted a ‘knowledge focus’ (GET) and ‘content and contexts’ (FET).

Kelly (1989) suggests that there are two main approaches to the selection of content for a curriculum. Perhaps they are not two different approaches, but rather one approach for making choices about the instructional discourse and another for the regulative discourse. The longest standing tradition is underpinned by the belief that particular disciplines represent intrinsically worthwhile knowledge. Hirst (1973) claimed that there were particular procedures or forms of knowledge, which underpinned these disciplines. We have already seen that the source-based approach favoured by the history curriculum is influenced by the procedures that generate or create historical knowledge. A second approach to content selection is the argument that there is a common cultural heritage in a society that should be passed on from generation to generation (Lawton, 1975). Lawton defines culture as everything that is man-made within a society, which would include the technology, communication systems, values, skills and attitudes. In a sense he is talking about the regulative discourse. What are the knowledge, skills, values and attitudes that children need to have to be citizens of a particular society? This regulative discourse for the South African curriculum has already been set by the Constitution.

According to most of the interviewees, the discussions around what content should be covered were more controversial. This is not surprising. The history curriculum had long been criticized for its biased and Afrikaner nationalist perspective (Chisholm, 1981; History Education Group, 1993; Kros & Vadi, 1993; Morrell, 1990). So what was the new narrative for a post-apartheid country going to be? Since history is horizontally structured, the discipline itself does not give any clues as to what should be taught and in what progression it should be taught. Similarly, outcomes do not present any guidelines as to what content to choose. While the values of the Constitution provide the general regulative discourse, they don't give guidance in terms of selection of content.

Probably the key criterion was to move away from the bias of the previous curriculum, which was focused on Europe and was seen to be presenting an Afrikaner Nationalist perspective on South Africa. The writing group did agree on the organizing idea of the curriculum, which was *South Africa in Africa in the world*. The writers felt that their

ideology was clear: it was the emancipation of the African voice; it was a shift from a Euro-centric to an African-centred curriculum. The curriculum certainly does focus on a far greater scope than was previously covered. For example, the opening question for the Grade 10 curriculum is: What was the world like in 1450? It has a focus on Africa (Songhay), China (Ming), India (Mogul), Ottoman Empire, the Americas, European societies and South African societies. This was a deliberate choice.

We wanted to get away from always saying that Europe and America are, you know, so powerful, so we wanted to say that there were other things happening around the world and let's look at these things in a comparative way (Respondent 2).

Our theme was we are re-creating a global village and therefore history must shift from being particular histories into universal history, we must look at ourselves as universal beings, as part of, er, what Dr Mandela used to say citizens of the world. So as an example,... we look at apartheid in the context of racism in the whole world (Respondent 3).

I argue that all knowledge production is ideological, and therefore we cannot claim that we did not have an ideology, our ideology was the emancipation of the African voice, the bringing into the mainstream the marginalized histories, but at the same time not diminishing the other histories... (Respondent 6).

As sections of the curriculum were drafted, these were sent out to reference groups where all organized stakeholders could have input. Although there was not a specific academic on the working group, the draft curriculum was sent out to a range of history academics in the Western Cape, KwaZulu-Natal and Gauteng, which were the provinces where the working groups usually met. The feedback received did change the direction of the curriculum process. There were some contentions over content from the academics:

A history professor from Stellenbosch, he would say 'what about Afrikaner Nationalism?' and then we would find people like [XXX] who is an African, he used to feel that we have not dealt with the role of Pan Africanism in the curriculum. ... I mean each one of us had his own thing that he wanted to include in the curriculum and unfortunately not everyone was catered for (Respondent 1).

And in terms of the comments we got some quite critical comments when it went out for public review, we got some quite critical ones in terms of the sort of

ideological stance. That it was a socialist curriculum. Neo Marxist. And then others thought that we hadn't covered enough ground (Respondent 4).

The Field Expert described some of the tensions that arose within the writing team as a result of discussions around content:

There were quite a lot of tensions within the writing team especially on the subject of slavery. And also the construction of racism and I had to get in there and say 'let's cool down, this is not personal, its about what historical perspective would be challenged or supported and how would you get learners to think for themselves and argue the case'... I remember one session where there was a breakdown in the group...so we had to do mediation. It was not the only group where this happened.

One member of the writing group felt that there were no serious contentions about content.

I think it was fairly easy...um, I mean, obviously, in terms of Africa we were influenced by people's specific interests...But, ja, people had their sort of favorite bits. Um, there was some concern and we did some negotiation about, about the sort of breadth of this, but in the end the overriding sort of principle was what kind of, what did we want the learners to take out as a functioning kind of citizen? There was a lot of discussion; there were no walk-outs, no serious contentions (Respondent 4).

However, one respondent felt that there was not sufficient focus on South African history and that another member was pushing an agenda of Africa being in the forefront.

Well, we argued about like how much of the African history should be there, and how much of South African history should be there. And my feeling as one of the members was there isn't much South African history, as I would have liked now. But then I mean, being a lone voice, not really a lone voice, maybe – but at the end the decision was [Field Expert] (Respondent 1).

This person felt that some people in the writing group were more likely to get their own way. When there are conflicting opinions, in the end one choice needs to be made and this was usually done by the convener of the writing group or the Field Expert for the Human Sciences.

I think the driving principle again going back to [Field Expert] – ok, I think that this curriculum is really his. What he was saying is that we should not be including material that has been covered before... We should look at something new that was the justification. Like for example the East, we are saying that we have never done anything about the East before, so we need to include it somewhere (Respondent 1).

One of the things the FET curriculum is not very successful at doing is streamlining the overlap of content between the GET and FET phase. The FET curriculum deals with a number of topics that are also covered in the Senior Phase, such as trading systems and the slave trade, the American Revolution, the Cape Frontiers in the nineteenth century (Gr 7); the French Revolution, the Industrial Revolution, colonialism (Gr 8), apartheid in South Africa, the Cold War (Gr 9). Since HSS is a compulsory learning area until Grade 9, the writers of the GET history curriculum obviously felt that all South African children should have knowledge of these key topics. It is not as clear why these are repeated in the FET band, although in a more in-depth way. One respondent felt that this was because most of the working group did not want to familiarize themselves with the new GET curriculum.

5.3.5 On history as a subject

I asked the interviewees what they understood as the purpose of studying history at school. Generally the focus was on memory, on consciousness-raising and on developing critical thinking skills. Interestingly none of them mentioned history as preparation for a career or as a vehicle for creating learners who would work actively to advance democracy (both of these perspectives are noted in the History NCS, Chapter 2).

Lest we forget! ... To me that is the purpose – we need that background which should remind us of what this country can be like. We are not teaching because it's going to give people jobs. Ok, some do get good jobs for History, but I think we need that memory. Which will keep us, which will always remind us that if we are not careful of what we do, the country can be what it was in the past (Respondent 1).

History should teach you all those life skills of being able to investigate something, to be able to look at what is essential, what is trivial, what is relevant what is not, they need to be able to think critically, to actually be able to recognize

that you're being manipulated and have the skills and the knowledge to counter that (Respondent 2).

I am personally convinced that the role of history is to raise consciousness of learners. Probably as a history student, they have a much more integrated view of the world... (Respondent 6).

One of the underpinning principles of the curriculum is integration, and the NCS states 'in an outcomes-based curriculum like the NCS Grades 10 – 12 (General), subject boundaries are blurred' (p.6). However, the interviewees were generally clear that there were particular procedures that underpinned history. They understood history as having some aspects that were particular to it.

History is about the legacy that has been left by those who were before us. History is a controversial subject, and you need evidence, evidence from the past and resources. The procedures that underpin history are investigation, use of sources, and construction of knowledge (Respondent 1).

I think there are things, not just generic that are part of the particular historians craft of investigation, the use of evidence, the variety of evidence that they are able to mobilize, history draws on so much, a historian is multi-skilled. Historical writing is very specific and technical, which makes it quite different from political science. And of course historians take a historical perspective, the long duree, so they are able to take a process approach, looking at processes rather than episodes, that's what makes them different (Respondent 6).

In discussions about the way in which the GET curriculum has paired History and Geography in the Learning Area of Human and Social Science, one interviewee said that history's particular recognition and realization rules were closer to English or even art, than to Geography.

I would say that history is much closer to English than to Geography... When you look at English and the manipulation of language, which is prejudice and which is the propaganda, and bias and those things that work through the use of language, it's much closer to what history is about. And art, because the language of art is the manipulation of image which is also closer than geography (Respondent 2).

The respondent's understanding is that what makes history, history is its use of language and in this it is 'closer' to school English than it is to geography.

5.3.6 On the curriculum document and its implementation

How did members of the Writing Group feel about the curriculum that was produced at the end? There were different perspectives from different members of the writing group. Generally there was a sense that it was sufficiently different from the apartheid curriculum, but that there was probably still too much content to cover. This is ironic since one of the on-going critiques of the 'apartheid' history curriculum was that it was content-heavy!

I think we were able to remove the 'great white man' theory. But then what did we put in? It's not the history that I would have liked if I had had the final report... But I think that I can live with this one [this curriculum].... I was hoping that we were going to have more of the South African history and that did not succeed (Respondent 1).

Well, I would – quite proud of it, really. I think we stretched it as far as it can go at this stage. I don't see that this is the end of this. I mean curriculum development has got to be ongoing, not that anyone wants to hear that (laughs). Ja, its not, it isn't perfect, it's a bit long...(Respondent 4).

I mean everyone in the group, I don't know about the others that you have interviewed, they feel very proud of the document, you know? So, we all came from our different backgrounds but the document that we produced we were all saying this is our document, we are proud of it... My only concern is depth, you've got so much - West Africa, the Incas and the Aztecs, I mean how deep can they go into those issues? (Respondent 5).

The writing group was aware that there would be a gap between the demands of the curriculum and the reality of teaching and learning in classrooms. The writing of a curriculum statement is generally divorced from its implementation. The writers of the curriculum were aware that there was a gap, which could be described in terms of teachers' preparedness to teach in a way that focuses on the skills of doing history in an

interpretive and critical way, the gap in terms of history content and the quality of the resources. One of the respondents described the challenges like this:

The first one [challenge] is the skills base, we haven't invested a lot to change teachers' orientation towards OBE... This is one serious problem – that teachers will allow learners the space to argue without having a predetermined answer to a question. The whole education system was built on an authoritarian way, the teacher knew it all. So that is the first major challenge. The second one is the resources, the textbooks, it requires a new cadre of textbook writers... The third one is bringing a group of learners who have not gone through an earlier education system that is global, and then you impose on them a new history that is wider, that could cause knowledge gaps in the teachers and in the learners (Respondent 6).

It's directly linked to the quality of the training that's happening out there. Um, I think that one of the biggest, biggest concerns is that teachers will think that they can just carry on teaching the same way (Respondent 4).

It was clear that the writers of curriculum understood that it would not be an easy curriculum for all teachers to work with, but essentially its implementation was not their concern. There was another directorate in the Department of Education who was to deal with issues of teacher training and curriculum implementation.

5.3.7 Individuals and networks

Obviously no curriculum writing group makes a curriculum in a vacuum. I have already described the previous developments in the history curriculum that provide the background to the making of this particular FET curriculum. There are also a number of individual personalities and networks that influence the process.

In this instance, the Minister of Education, Prof Kader Asmal took a particular interest in the history curriculum. In fact, Fataar (2006) writes that the disappearance of history as a school subject (which was to be integrated into human and social sciences) was decisive in influencing Asmal about the need to review C2005. One of the subject writing group said: 'It was a passion for him, and it really helped to pave the way' (Respondent 6). The recommendations of the *Report of the History and Archaeology Panel* also influenced the

Writing Group. According to one respondent ‘the Ministerial Committee was for history’, meaning that the Committee took a special interest in history.

Lulu Callinicos [a historian on the Ministerial Committee] was involved and was able to influence us [regarding the focus on archaeology and heritage] (Respondent 1).

The South African History Project had been set up by Asmal on the recommendation of the History and Archaeology Panel of the Values in Education. Its purpose was to explore ways of strengthening the teaching of history in schools, and to address the systemic crisis around history provision. Three members of the FET writing group process were representatives of the SAHP. During the writing process, one of these members left the SAHP and returned to the provincial education department. The Field Expert for Human Sciences on the Ministerial Project Committee was also part of the Ministerial Committee set up to oversee the SAHP. So this Project clearly played a major role in the development of the FET curriculum.

Three of the people involved in the writing of the FET curriculum had worked together in the 1990s when they had formed the new KZN History Forum which broke away from the narrow Natal History Teachers’ Association. They had been involved in training teachers for the source-based approach. At least four members had been involved in writing textbooks prior to their writing the FET curriculum. For at least half the members, there was a strong background in a source-based history and pedagogy.

There was a great deal written about the history curriculum in the 1980s and early 1990s (History Education Group, 1993; Krige et al., 1992; Krige & Witz, 1990; Kros & Vadi, 1993; Morrell, 1990; Seleti, 1997; Siebörger, Kallaway, Bottaro, & Hiscock, 1993; van den Berg & Buckland, 1983). It is interesting that of these people, only Yonah Seleti was involved in the FET curriculum writing process. This may be because the imperatives of gender, race and stakeholder representation had to be balanced with expertise, or because others were not invited or not able to participate.

The key debates at that time about a ‘people’s history’ and nation building (Cuthbertson & Grundlingh, 1992; Kros & Vadi, 1993) do not seem to have impacted on the FET curriculum. The curriculum does not appear to engage with these issues. It had to be driven by outcomes and it could be argued that the focus on outcomes and skills has sidestepped questions about a new national narrative. The rhetoric around the outcomes-based curriculum process is that all planning begins with the outcomes. However, there are strong arguments that a content-rich subject such as history cannot be driven by outcomes. Siebörger (2006), an historian and educationist, argues that if one starts to plan with the outcomes and assessment standards, then one ends up with something that is not history. It appears that Departmental documents are ambiguous as to whether planning in history begins with content knowledge or the Assessment Standards. In the next chapter, we see that the curriculum focuses strongly on the outcomes and assessment standards. As the study unfolds, it becomes clearer what the implications of this are for teachers and learners in classrooms.

5.4 Conclusion

This chapter has described development of the history curriculum since 1990 and focused most specifically on the writing of the FET history curriculum. It has described the external constraints that the writing group worked with, the contestations and the agreements that characterized the writing process. At the level of the general regulative discourse, there were strong guidelines in terms of the Constitution, and at the level of the general instructional discourse, there were strongly framed guidelines in terms of organizing the curriculum around outcomes and assessment standards.

The process was strongly informed by the Minister of Education, Prof. Kader Asmal who took a personal interest in history as a school subject. Inevitably there were tensions that arose within the writing group. Initially these were around a fundamental understanding of the study of history – as a science or as an ideologically-informed interpretation of events. There were also tensions around content. Although the group was in agreement about the focus of South Africa in Africa in the world, one of the participants felt that

there was not sufficient focus on South Africa. There was a sense that power was unevenly distributed in the group, which is unsurprising. Certain members had greater power to make decisions at certain times. Overall the writing group agreed that they were proud of the curriculum which they had produced, but recognized that it would not necessarily be easy for teachers to work with in their classrooms. The work of creating a curriculum is completely separate from the work of implementing it in classrooms.

Chapter 6

The Official Recontextualising Field: Analysing the History curriculum documents

6.1 Introduction

This chapter presents the analysis of two history curriculum documents used in South African high schools over the past ten years. These are the 1996 Senior Certificate Syllabus for History (Higher Grade) and the 2003 National Curriculum Statement for History Grades 10 -12 (General) which was implemented in Grade 10 classrooms in 2006, Grade 11 classrooms in 2007 and Grade 12 in 2008. The analysis concerns the knowledge, pedagogy, discourse and competences and assessment in the two curriculum documents. The analysis was done both deductively and inductively. Bernstein's concepts of framing, classification and regulative and instructional discourse were used to describe modes of pedagogy, knowledge, discourse and competences. Bloom's Revised Taxonomy was used to describe cognitive demand of the learning outcomes and assessment standards of the NCS. Inductive analysis was used to describe important concepts that were not captured by the deductive tools, such as assumptions about the epistemology of history and historical thinking and the purpose of school history.

Theoretically, the chapter is located within the ORF of the pedagogic device, as shown in the figure at the beginning of Chapter 5.

6.2 Using Bernstein to analyse the curriculum documents

Harley and Parker (1999) use theoretical concepts drawn from Durkheim and Bernstein to analyse the curriculum reform process in South Africa, suggesting that these perspectives ‘provide promising criteria for empirical investigation into the identities and practices and roles and competencies, of educators and learners in diverse contexts’ (p. 182). They suggest that the National Qualifications Framework is attempting to combine a competence approach where assessment is ‘rooted in the ultimate inscrutability or non-observability of learning, making assessment reliant on the professional judgement of the assessor(s)’ (p. 183), and an outcomes-based approach which emphasises the observation and measurement of performance. This hybrid approach leads to a tension for classroom learning and assessment, in that on the one hand a competence approach believes that there are no learner deficits, while at the same time an outcomes-based approach implies specific benchmarks. Kraak has described the tension as ‘a learning methodology which is simultaneously radical in discursive practice but behaviouralist in assessment technology’ (1999, p. 38).

In an analysis of Curriculum 2005, Harley and Parker suggest that framing is weakened in all respects except the criteria of specific and critical outcomes, which has implications for relationships of power in the classrooms where teachers have been seen as the authority. There is also a move from a collection code, where subjects have strong boundaries to an integrated code where there are weak boundaries between the subjects. This integration threatens teachers with identities strongly attached to the subjects that they teach as well as creating new recognition rules, which may be unfamiliar to teachers and learners (Harley & Parker, 1999).

Drawing on the work of Harley and Parker (1999), Graven (2002) also uses Bernsteinian concepts to analyse Curriculum 2005, particularly in relation to the Mathematics

curriculum. She concluded that the curriculum shows a move from a performance model of pedagogy to a competence model. According to Bernstein (1996), the performance model emphasises specific outputs and texts that the acquirer is expected to construct. The focus is on assessing what learners have not acquired. Instruction is strongly framed, where learners have less control over the selection, sequencing and pacing of knowledge. In the competence model, the theory of instruction is focused on the learner, where learners have more control over the selection, sequencing and pacing. Time is used more flexibly, and assessment emphasises what is present in the learners' product. Graven points out that there are theoretical tensions in locating outcomes within a competence model, since the setting of benchmarks inevitably incorporate the concept of deficit, which is contradictory to competence models.

Both Harley and Parker (1999) and Graven (2002) suggest that the shift from a collection code to an integrated code and from a performance mode of pedagogy to a competence model will have implications for the identities of teachers.

Internationally there is an example of using Bernstein's concepts to interrogate change in the Science syllabuses in Portugal by Ana Morais and her colleagues (Morais et al., 1999). The study analyses the theory of instruction (using Bernstein's concept of framing) legitimised in the present reform (1991) and the previous reform (1975). The study shows a shift from a more self-regulative theory of instruction to a mixed theory of instruction. Methodologically, I draw on this study as a model for developing an external language of description to 'read' the data of the curriculum documents.

6.3 The history curriculum documents

Two History curriculum documents were analysed, the 1996 Senior Certificate Syllabus for History (Higher Grade) called the Interim Core Syllabus (ICS) and the 2003 National

Curriculum Statement for History Grades 10 -12 (General) (NCS). This history of curriculum change is documented in Chapter 5, but I recap here briefly. The ICS document was a result of the curriculum ‘cleansing’ process that took place after the democratic government took power . According to the History and Archaeology Panel Report, the Interim Core Syllabus of 1996 broadened the narrative to move beyond ‘white’ history, adapted to the needs of a democratic order and yet retained an essentially traditional approach to history teaching (Department of Education, 2000a). Kros (1996) suggests that even after the curriculum review process, the document was fragmented, still riddled with high level abstractions and overloaded with content.

The NCS is the new outcomes-based curriculum for the Further Education and Training (FET) phase, which follows on from the Revised National Curriculum already implemented in the General Education and Training (GET) phase. In line with recommendations from the Review Committee (2000), Curriculum 2005 underwent a massive revision that resulted in the Revised National Curriculum Statements (GET). The FET National Curriculum Statements were written after the GET NCS. The basic principles of outcomes-based education, learner-centred pedagogy and integration of knowledge remain. The NCS was implemented in Grade 10 classrooms in 2006, and will replace the ICS.

The two documents are structured very differently. The ICS is 13 pages long. Four pages cover the following headings: Aims, General Aims, Specific Aims, General Remarks, Examination, Formal Examination and The Assignment. Nine pages are dedicated to lists of content that should be covered in Standards 8, 9 and 10.

The NCS History is an A4 book consisting of four chapters in 62 pages. Chapter 1 describes the principles and design features of the NCS in general, and is common to all the subjects. Chapter 2 introduces the subject of History, describing the definition, scope,

purpose, career links and Learning Outcomes of the subject. Chapter 3 reiterates the Learning Outcomes, and also describes the Assessment Standards and the content and the contexts that are provided to support the attainment of the Assessment Standards. The content is presented in the form of key questions, such as ‘What was the world like in the mid-fifteenth century?’ Chapter 4 deals with assessment in general and also lists the subject competence descriptions that distinguish the level at which learners have achieved various learning outcomes.

6.3.1 Coding the documents

The curriculum documents were coded both deductively and inductively. The deductive categories were classification (for integration of knowledge), framing (for a theory of instruction), instructional and regulative discourses and cognitive demand. These categories are more fully described in the methodology chapter. However, a more qualitative and inductive analysis was also done to capture key ideas that were not captured by the deductive categories, such as the discourse about the purpose of teaching history, the role of values in school history and the actual content to be taught.

In terms of knowledge integration, I was looking for three different relationships. Firstly, what are the discursive relations *between* History and *other* subject disciplines? (Inter-disciplinary classification); secondly, what are the discursive relations between various topics *within* the subject of History? (Intra-disciplinary classification), and thirdly, what are the discursive relations between school discourse and everyday discourse, that is, between the subject of history and everyday knowledge? (Inter-discursive classification).

In terms of pedagogy, I was looking to see what degree of control was given to the teacher and what degree of control was given to the learner in terms of what should be learnt, how it should be learnt, how quickly it should be learnt and how it will be

assessed. Instructional and regulative discourse describes the focus on the cognitive aspects and the attitudinal or affective aspects of schooling respectively. In terms of cognitive demand, Bloom’s Revised Taxonomy was used to analyse the learning outcomes and assessment standards of the NCS.

Table 7: Summary of the deductive categories used to analyse the curriculum documents

Category	Analytic tool
Knowledge integration	Classification <i>Inter-disciplinary</i> <i>Intra-disciplinary</i> <i>Inter-discursive</i>
Pedagogy	Framing
Expressive and cognitive competences	Instructional and regulative discourse
Cognitive demand	Bloom’s Revised Taxonomy

An inductive analysis captured themes around the role of values, the way in which knowledge was structured, what kind of content was to be learned and underlying assumptions about the epistemology of history and its purpose in the school curriculum. The analysis will be presented using the broad categories of knowledge, pedagogy, discourses and competences and assessment.

6.4 Knowledge

6.4.1 How is knowledge integrated in the curriculum documents?

The Interim Core Syllabus (1996) is very strongly classified in both the inter-disciplinary and intra-disciplinary relations. This means that history stands clearly as a separate discipline and that topics within history are taught discretely. History is presented as a discipline with very specific knowledge and procedures unique to itself. There is very little indication that History could be integrated with other subjects. This is seen in the opening statement of the syllabus:

General Remarks

Preamble: Aims

History is a systematic study of the past. It is a study based on evidence: a selection of facts and events that are arranged, interpreted and explained.

Thus History, in addition to its content, is also a mode of enquiry, a way of investigating the past which requires the acquisition and use of skills.

In terms of intra-disciplinary relations, the topics or sections of History that are taught are strongly insulated from one another. For example, the Revolution in France stands very clearly on its own, with a focus on the political, economic, social and religious factors which led to the Revolution followed by the meeting of the Estates-General, the fall of the Bastille and the march to Versailles.

There is one statement in the Interim Core Syllabus curriculum document that suggests that local or regional history should be included in the curriculum.

Project work in connection with local and/or regional history is strongly recommended.

The ICS makes no explicit mention of the integration of everyday knowledge (inter-discursive relations).

In contrast to this, the statements in the National Curriculum Statement (2003) show a greater range of classification relations. While half of the statements can be strongly classified in the inter-disciplinary field (that is to say, they are strongly focused on history as a separate discipline), just more than a third are weakly classified. This means that the boundaries between History as a very distinct discipline and other disciplines are weakened (but not to the extreme extent of C2005). Chapter 2 begins with the following definition of history:

History is the study of change and development in society over time and space. It also draws on archaeology, palaeontology, genetics and oral history to interrogate the past.

The fourth learning outcome on heritage introduces learners to the issues and debates around heritage and public representation, indigenous knowledge systems and the understanding of human origins. This focus on heritage and the mention of archaeology, paleontology and genetics is a new turn for the history syllabus that was not a focus previously.

Neither the ICS nor the NCS had many statements coded in the inter-discursive category, as everyday knowledge is not explicitly mentioned in the content lists of either document. There may be a number of reasons for this. Firstly, C2005 attracted criticism because of its strong focus on everyday knowledge (N. Taylor, 1999) and the Review Committee recommended that the RNCS strengthen the disciplinary foundation of the various subjects (Department of Education, 2000b). Secondly, history as a school subject is not as abstract as say Mathematics, where everyday knowledge (such as shopping) is used to make it more relevant to learners' lives. Thirdly, history as a horizontal knowledge structure finds its specialisation more in the procedures or ways of thinking, than in vertically progressive knowledge. Having said this, history teachers are still urged in the NCS to 'embed the material into situations which are meaningful for the learner.'

6.4.2 How is knowledge presented in the curriculum documents?

The way in which knowledge is presented in the NCS is very different from the ICS in terms of the intra-disciplinary category (that is, how strong are the boundaries between the different topics or sections within the curriculum?). Probably the most obvious way in which the ICS shows strong intra-disciplinary classification is by keeping the sections of South African history and General History separate. This distinction is not seen in the NCS, where South African history is not put into a separate section. In the Grade 10 syllabus, South Africa does not appear, except as an exemplar of the sub-theme *The ending of slavery in British colonies* which falls under the broader theme *The quest for liberty*. South Africa appears in Grade 11 syllabus under the theme *How unique was apartheid South Africa?* South Africa has a greater focus in the Grade 12 year, but only one theme deals with SA particularly viz. *How did South Africa emerge as a democracy from the crises of the 1990s?* In other instances, South Africa is simply an exemplar of a broader theme, for example of civil society protest.

In the NCS, knowledge is presented very differently to the ICS. Key questions frame and structure the knowledge, with a focus on broad themes. Under the heading ‘Content and contexts for the attainment of assessment standards’, the NCS states

The overall key questions for the FET band are: How do we understand our world today? What legacies of the past shape the present? In understanding our world today and legacies that shaped our present, *the broad themes of power alignments, human rights issues, of civil society and globalisation* were used in suggesting areas of content (NCS, Chap 3, p. 24) (my italics)

The difference in the way in which knowledge is presented in the two documents is shown in the following example of the French Revolution which is taught in Grade 10.

Table 8: The French Revolution as presented in the ICS and the NCS

Interim Core Syllabus (1996) Standard 8	National Curriculum Statement (2003) Grade 10
<p>SECTION A: GENERAL HISTORY THE DEVELOPMENT OF NATIONALISM, LIBERALISM AND SOCIALISM IN EUROPE FROM 1789</p> <p>THE POLITICAL REVOLUTION: THE DEVELOPMENT OF LIBERALISM AND NATIONALISM The Revolution in France, 1789 to 1795</p> <p>1.1.1 The political, economic, social and religious factors which led to the French Revolution and the contribution of Montesquieu, Voltaire and Rousseau.</p> <p>1.1.2 The meeting of the States-General, the fall of the Bastille and the march to Versailles.</p> <p>1.1.3 The work of the National Assembly, the fall of the Monarchy, France and the Revolutionary wars against Austria and Prussia.</p> <p>1.1.4 The National Convention, the Reign of Terror and the Directorate.</p>	<p>The quest for liberty:</p> <ul style="list-style-type: none"> • How did the American War of Independence challenge the old basis of power? Who benefited? • The French Revolution and the ideas of liberty, equality, fraternity and individual freedom: What sort of liberty, equality and fraternity was involved? How did the ideas play out in the relationships between the French and other people (e.g. Africa, Haiti)?

The table shows quite clearly that in the ICS, history is seen as a number of topics that need to be covered in chronological order. It appears that the main focus is knowledge about the French Revolution, the factors that lead up to it and the events that unfolded. For its own sake, the French Revolution is a key part of historical knowledge. In the NCS, the main focus is not the French Revolution per se, but rather the concept of liberty, and specifically, the quest for liberty in various parts of the world at various times. The French Revolution is seen as an exemplar (along with the American War of Independence) as the ‘quest for liberty’.

One way of understanding this difference is to draw on understandings of hierarchy

within education. Essentially knowledge in the NCS is structured as an intensional hierarchy, rather than an extensional hierarchy as it was in the Interim Core Syllabus. Intensional hierarchies reach for abstract principles from which larger and larger domains of explanation can be generated (Hugo, 2005), whereas extensional hierarchies work with ever enlarging contexts. So in the ICS there is an extensional ordering of knowledge. Within European history, one learnt the political revolution and the development of liberalism and nationalism, then about the French Revolution, and within the French Revolution, the political, economic, social and religious factors etc. The details of the particular context are important here. In contrast the NCS orders the curriculum around key concepts, in this case, the quest for liberty and then uses the French Revolution as a concrete example of that abstract concept. The focus is on the ideas or concepts of liberty, equality, fraternity and individual freedom, rather than the detail of the specific example. It is the abstract principles that order the curriculum. The NCS is primarily organised in an intensional way (through broad themes or principles), and then is extensional within these²⁵.

The NCS clearly shifts away from a Eurocentric focus and also from a strong South African focus. The emphasis is on the *world* with the overall key questions for the FET band being ‘How do we understand our world today?’ The Grade 10 proposed content opens with the question ‘What was the world like in the mid-fifteenth century?’ and examples given are of Africa (Songhay), China (Ming), India (Mogul), Ottoman Empire, the Americas. It is broadly structured chronologically, in that Grade 10 covers 1450 to 1850, Grade 11 covers 1850 to 1950 and Grade 12 deals with the decades since 1950.

The table below tabulates an abbreviated list of content for the three grades in the two curriculum documents. The weight of the content is much more in the NCS, meaning that it is covered in much less detail than it would be in the ICS.

²⁵ Caroline Coffin’s (2006) work provides useful ways of understanding the different genres of school history, with a clear division between narrative and argument. However, I only began engaging with her work seriously at the end of this study, so simply point to it as another fruitful way of analysing school history.

Table 9 : Abbreviated list of content: Interim Core Syllabus, 1996 and National Curriculum Statement, 2003

	Interim Core Syllabus (1996)	National Curriculum Statement (2003) Proposed content and contexts
GRADE 10	<p>A: General history</p> <p>The development of nationalism, liberalism and socialism in Europe from 1798</p> <p>1. The political revolution: the development of liberalism and nationalism. (French Revolution and Napoleon Bonaparte.)</p> <p>2. The economic revolution: the development of industrialism, capitalism, socialism and democracy to 1928 (Industrialisation and urbanisation in Britain and Europe)</p> <p>B: South African history</p> <p>The conflict over land and resources (1840- 1881)</p> <p>1. The conflict over land</p> <p>2. Britain and the diamond fields dispute</p>	<p>What was the world like in the mid-fifteenth century?</p> <p>What was the impact of conquest, warfare and early colonialism in the Americas, Africa and India?</p> <p>Slavery</p> <p>The quest for liberty</p> <p>Industrial Revolution</p> <p>What transformations occurred in Southern Africa between 1750 and 1850?</p> <p>How did the world change between 1450 and 1850?</p> <p>What are the constructed heritage icons from the period that are celebrated today?</p>
GRADE 11	<p>A: General history</p> <p>1. Circumstance and events since 1871 that lead to the First World War.</p> <p>2. The peace conference in Paris and the League of Nations.</p> <p>Choose one:</p> <p>3. The USA in the 19C</p> <p>4. The rise of Japan</p> <p>5. Russia in 19C</p> <p>B: South African history</p> <p>1. The mineral discoveries and their economic and social effects up to 1926</p> <p>2. Political history 1902-1924</p>	<p>What was the world like by 1850?</p> <p>Imperialism.</p> <p>What were the range of responses to colonialism in Africa and Asia?</p> <p>Challenges to capitalism: the Russian Revolution and the establishment of the communist state.</p> <p>Crisis of capitalism: the Great Depression in the USA</p> <p>What was the impact of pseudo-scientific racism and Social Darwinism on the nineteenth and twentieth centuries?</p> <p>Competing nationalisms and identities in Africa.</p> <p>How unique was apartheid South Africa?</p> <p>How did the world change between 1850 and 1950?</p> <p>How has the South African past been publicly represented?</p>

GRADE 12	<p>A: General history</p> <p>The world in the twentieth century</p> <ol style="list-style-type: none"> 1. The rise of the superpowers 1917 – 1939 2. Circumstances which led to the Second World War 3. International relations and events 1945-1970 <p>B: South African History</p> <ol style="list-style-type: none"> 1. Political history 1924 – 1948 2. 1948 – 1994 (1976 - 1994 not for exam purposes) 	<p>What was the impact of the Cold War in forming the world as it was in the 1960s?</p> <p>How was <i>uhuru</i> realised in Africa in the 1960s and 1970s?</p> <p>What forms of civil society protest emerged from the 1960s up to 1990?</p> <p>What was the impact of the collapse of the USSR in 1989?</p> <p>How did South Africa emerge as a democracy from the crises of the 1990s?</p> <p>What do we understand by globalisation?</p> <p>What are the ideologies and debates around constructed heritage icons from the period?</p>
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6.4.3 The purpose of studying history

In terms of the purpose of learning history, the ICS states that

The events, communities and peoples of the past are studied in order to develop an appreciation of other times and places, but also because they are *interesting in themselves* (my italics).

History is about developing the skills to investigate the past and to develop the imagination. The focus is on the development of the individual and the development of a breadth of historical knowledge, which is interesting in itself. The aims of history are to contribute to the personal development of pupils, to develop a sense of citizenship and positive values and attitudes, to develop an understanding and appreciation of their heritage and that of other peoples and cultures. It should also ‘contribute to their understanding of the unique nature of individuals and events and their understanding of history as an academic discipline’ (ICS, p. 1).

The NCS also sees history as developing the capacity of individuals but this is done for a particular purpose which is ‘to build the capacity of people to make informed choices in

order to *contribute constructively to society and to advance democracy*' (my italics). The study of history is about 'developing a rigorous process of historical enquiry, as well as being a vehicle to support democracy and human rights' (NCS, Chap 2, p. 9). It is interesting that the ICS wants learners to understand 'the *unique* nature of individuals and events' while the NCS is concerned more with individuals and events as *exemplars* for broader historical concepts such as 'the quest for liberty' or 'transformation'.

The NCS curriculum documents had to be passed through an Indigenous Knowledge Systems and a Human Rights and Values Committee to ensure that these areas were covered sufficiently, and must include these issues, as shown in the following statement:

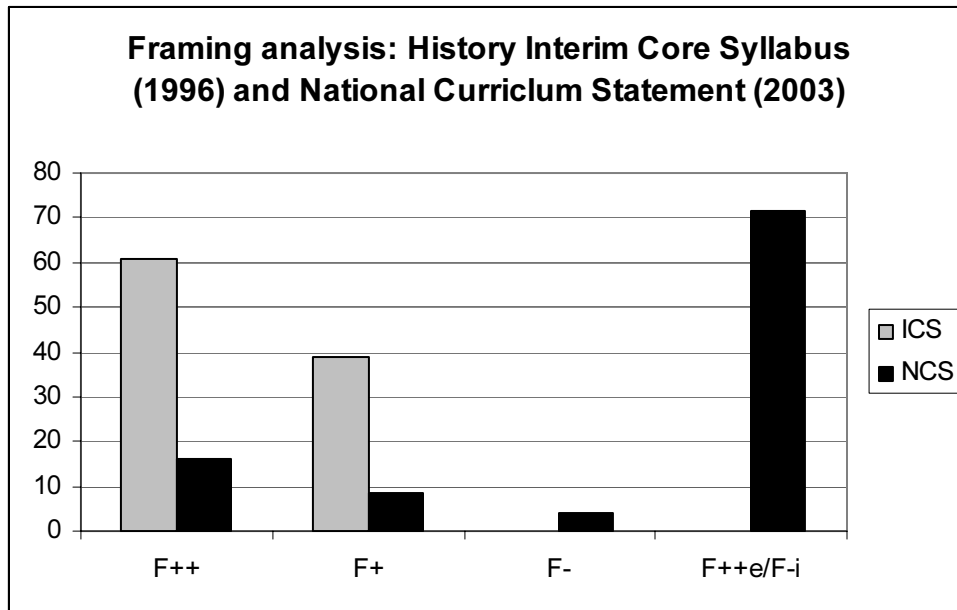
The Assessment Standards related to these Learning Outcomes broadly include issues related to human rights and indigenous knowledge systems. (NCS, Chap 2)

6.5 Pedagogy

6.5.1 Theory of instruction

In terms of the theory of instruction, there is a key change between the Interim Core Syllabus (1996) and the National Curriculum Statement (2003). The 1996 curriculum is very strongly framed, with almost two thirds of statements coded in this way. The remainder of the statements are coded F+ and there are no weakly framed statements. Thus the theory of instruction is strongly focused on the teacher.

Figure 10: Framing analysis: the theory of instruction



In contrast, the NCS shows a much more mixed theory of instruction with a spread of statements coded as very strongly framed, strongly framed and weakly framed. Being an outcomes-based document, more than two thirds of the coded statements are assessment standards or outcomes. These are interesting in that they are *both* strongly framed (external) and weakly framed (internal). That is to say that there is a strong imperative (either from the curriculum document or from the teacher, but from a place *external* to the learner) that the learner *will* achieve certain skills or understandings – he or she does not have much choice in the matter. At the same time, these skills or understandings are learner-centred, in that the *learner* must actively develop certain understandings, skills and attitudes and so they are weakly framed. Jansen (1998) notes the essential contradiction inherent in pre-specified learning outcomes – that learners should use knowledge critically and creatively and yet the desired learning outcomes are already specified. Similarly Harley and Parker (1999) identify the tension of having

predetermined outcomes which must be met within what is essentially a competence model of pedagogy.

Muller and Gamble (forthcoming) argue that in fact the outcomes are weakly framed in that they specify skills but not content. Figure 11 lists the outcomes, and it can be seen that content is not mentioned in the outcomes at all. They are generic competences. Interestingly, not one of them requires the learner to actually *learn* history.

Figure 11: History outcomes for the FET phase

History outcomes: Grades 10 -12
Learning outcome 1
Enquiry Skills (Practical competence) The learner will be able to acquire and apply historical enquiry skills.
Learning outcome 2
Historical Concepts (Foundational Competence) The learner is able to use historical concepts in order to analyse the past
Learning outcome 3
Knowledge Construction and Communication (Reflexive competence) The learner is able to construct and communicate historical knowledge and understanding.
Learning outcome 4
Heritage (Reflexive competence) The learner is able to engage critically with issues around heritage.

6.5.2 Pedagogy for history

Our understanding of the question ‘what is history’ influences the way in which history is approached at school or ‘what is history at school for?’ Chapter 5 described two approaches to teaching history at school. The first is history as narrative of events that have happened in the past, history as a number of facts that are presented in a

chronological way. The second approach to history at school is that it should introduce children to historical ways of thinking, to the reading and interpreting of source materials to recognize bias, to the skills of inquiry and critical thinking. In South Africa in the 80s and 90s in some provinces there was a shift towards this kind of source-based approach to history, which clearly drew on the experience of the Schools' Council Projects in England, which had been launched in 1974 (Mathews, 1992). It is more useful to think of these approaches as both/and rather than either/or. A 'source-based' approach cannot take place in a vacuum, in a learning situation that is devoid of concepts, of events and of chronology.

In terms of pedagogy specific to the subject of history, the ICS does see history as a 'mode of enquiry, a way of investigating the past which requires the acquisition and use of skills'. However there is a much greater emphasis on history as a way of understanding people and communities and to gain a better understanding of the past.

The emphasis on historical enquiry skills is much stronger in the NCS which states:

Learners who study history use the insights and skills of historians. They analyse sources and evidence and study different interpretations, divergent opinions and voices. (Chap 2, p. 10).

This emphasis is seen most clearly in the first learning outcome: 'The learner is able to acquire and apply historical enquiry skills'. It is clear that assessment will become much more strongly focused on source-based questions and less on traditional essays (Department of Education, 2007). This has already begun to shift in the Senior Certificate examination since 2003 (Umalusi, 2004). The Umalusi (2004) report on the 2003 History Senior Certificate examination noted that the examination moved away from the traditional approach, which tested the candidate's ability to memorise content and reproduce it. The new style history paper required critical engagement with historical problems and texts through the evaluation of source material and questions of historical

interpretation. The report noted that more innovative assessment techniques comparable to those currently (ie in 2003) being piloted in the National Senior Certificate examination, had been in operation since the mid-70s in the Joint Matriculation Board, Natal Education Department and the House of Delegates exam papers prior to 1994.

Although there is a strong focus on developing the skills of analysing sources and weighing up evidence, the NCS does not include less content than the ICS did. A possible consequence of the 'new' enquiry-based history was that 'skills' came to be seen as opposed to 'content' (2006). This was partly because an outcomes-based curriculum design leads from outcomes (which include no content) and partly as a reaction to the 'apartheid' education which focused so strongly on history as facts to be learned, rather than concepts to be understood, debated and interpreted.

6.6 Discourses and competences

The nature of the two documents is made clear in the results of the discourses and competences analysis. The ICS is made up primarily of content or knowledge statements (84%), with a small number of statements coded as Specific Instructional Discourse (SID). These are coded as complex cognitive competencies (9%). Only 6% of statements are coded as Specific Regulative Discourse and these are all complex socio-affective competencies.

Only 0.7% of statements are coded as General Regulative Discourse, referring to the national values and attitudes desired by the State. The only mention of values made in the ICS is the development of 'positive attitudes and values' that are not explicitly defined. Under General Remarks the syllabus states: 'Attitudes and values cannot be tested. The aim should be to contribute to the growth and maturing of the pupil'. So this curriculum document has a major focus on content and very little mention is made of the

regulative discourse.

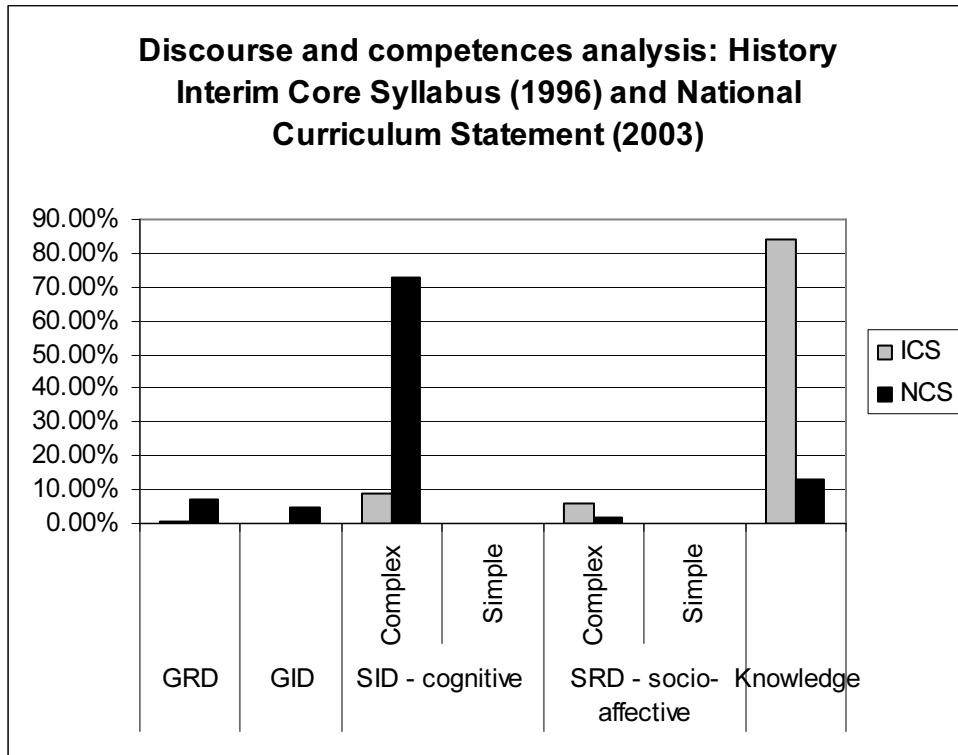
In contrast, the National Curriculum Statement has 7% of statements coded as General Regulative Discourse (GRD) and 5% coded as General Instructional Discourse (GID). The focus on the GRD is in keeping with the new national curriculum's focus on social transformation and the role of education in promoting human rights, inclusivity, and environmental and social justice. 'The study of History builds the capacity of people to make informed choice *in order to* contribute constructively to society and to advance democracy' (p. 9, my italics).

The proposed content in the NCS are phrased as questions. Often these questions emphasise specific values, which is not surprising, since the Constitution of South Africa 'provided a basis for curriculum transformation and development in South Africa' and the curriculum is based on the principles of social transformation, human rights, inclusivity, environmental and social justice (Department of Education, 2003). Thus the Grade 10 section on slavery has the following question: What was the link between the Atlantic slave trade and racism? In Grade 11, a question is: How did imperialism and colonialism entrench ideas of race – segregation, assimilation, and paternalism? How did imperialism dominate indigenous knowledge production? Thus the issues of slavery, imperialism and colonialism cannot be taught in neutral ways. The NCS foregrounds the issue of values far more explicitly than the ICS document does.

The majority of statements in the NCS are coded as complex cognitive within the specific instructional discourse (SID). The ICS is a document that focuses primarily on content (9 of 13 pages) while the NCS is a document that focuses primarily on Learning Outcomes and Assessment Standards (30 of 62 pages) which all document the development of complex cognitive competences. This is not to say, however, that teachers have not been interpreting the ICS content/ knowledge statements in cognitively complex ways. There

are no statements coded as simple cognitive or simple socio-affective in either curriculum document.

Figure 12: Discourses and competences



6.6.1 Assessment

Examining how knowledge is assessed also gives insight into how a curriculum document understands knowledge. In keeping with the principles of OBE, the NCS has a strong emphasis on assessment. Four pages of Chapter 2 (History) are dedicated to the four learning outcomes. Eight pages of Chapter 3 (Learning outcomes, assessment standards, content and contexts) are dedicated to the Learning Outcomes and the Assessment Standards and the remaining ten pages of that chapter cover the proposed

content. Chapter 4 (Assessment) has eight pages covering the generic aspects of how to assess, when to assess etc, and the remaining seventeen pages cover the competence descriptions for the three grades (Grade 10,11 and 12). Overall, 37 pages (60%) of the 62 page document discuss assessment. In contrast the ICS dedicates 1 ½ pages to assessment (called Evaluation). This is a set of technical suggestions about how many examination papers should be set and what kinds of questions would be appropriate.

The learning outcomes and assessment standards of the NCS were analysed using Bloom's Revised Taxonomy. This analysis is shown in Table 11. It is clear that the assessment standards of the NCS require learners to work at high levels of cognitive processes. (This cannot be compared to the ICS as there is no comparative material in that syllabus document.) The majority of Assessment Standards fall into the categories of understanding and analysing conceptual knowledge, so there is a clear movement away from assessing history only as factual knowledge. There are a number of assessment standards that expect learners to create, evaluate and analyse different levels of knowledge.

Aside from the NCS, history teachers also need to engage with the Subject Assessment Guidelines for History (Department of Education, 2007)²⁶. This is a 37 page document which outlines in great detail how assessment is to be undertaken. It is quite adamant that all assessment for the FET will be source-based. Teachers are given strongly externally regulated guidelines on how to design their tests (for an example, see Appendix M3). Tests must be based on a range of sources, must be organised around a key question and must conclude with a piece of 'extended' writing. Thus while teachers may be able to develop learners' coherent conceptual understanding of the context and time of particular historical events in their classroom teaching, the assessment is very strongly source-based. The skills of history seem to have completely eclipsed any knowledge of history. There is anecdotal evidence that suggests that learners could in fact pass the history tests

²⁶ These Guidelines were written by four members of the subject writing team.

with very little history knowledge. Chapter 9 contains a more detailed discussion on assessment as it is implemented in three schools in 2006.

6.7 Summary of the major shifts

The main shifts can be summarised in tabular form as follows:

Table 10 : Key curriculum changes 1996 to 2003

	Interim Core Syllabus (1996)	National Curriculum Statement (2003)
Inter-disciplinary knowledge	Collection C++	Mixed: moves from C++ to C-
Intra-disciplinary knowledge	C++	C+/C-
Inter-discursive knowledge	C++	C+/C-
Structure of knowledge	Extensional	Intensional
Focus of content	European history 1789 - South African history 1840 - 1976	Global focus – how has the world changed since 1450?
Pedagogic modes	Performance	Competence (but outcomes as skills clearly benchmarked and externally framed).
History pedagogy	History as narrative for understanding the past. History as a body of knowledge.	Strongly skills-based and source based. History as procedural skills.
Regulative discourse	RD minimal and not explicitly named: simply ‘positive values’.	Strong focus on RD. Constitutional values – democracy, civic responsibility etc.
Purpose of studying history at school	Interesting for it’s own sake. Individual development.	Developing learners as agents for social change. History supporting democracy and human rights.

6.7.1 Knowledge integration

In terms of knowledge integration at an inter-disciplinary level, the clearest change is that the NCS makes mention of palaeontology, heritage, archaeology, genetics and oral

history. It also shows greater intra-disciplinary integration, in that the South African and General history sections are no longer separated, but the content is arranged according to key themes. In terms of how knowledge is presented, it is framed in terms of key questions, many of which make the Constitutional values of the curriculum quite clear. Values are much more explicitly highlighted and the purpose of learning history goes beyond the individual developing skills and knowledge to envisioning individuals who will work for social transformation and democracy.

The ICS presented knowledge as an extensionally-ordered structure, with increasing levels of detail in the context such as ‘the economic, social and economic causes of the French Revolution’. The new FET curriculum structures knowledge in an intensional way, where the French Revolution is only one concrete exemplar of the abstract concept, the ‘quest for liberty’. Teachers are expected to make connections and links and ask the following questions listed in the NCS: What sort of liberty, equality and fraternity was involved? How did the ideas play out in the relationships between the French and other people? (eg Africa, Haiti). Teachers will also have to master new sections of content which have not been taught before, such as the Songhay, Ming and Mogul empires, Social Darwinism, globalization and specific areas of heritage.

6.7.2 The new narrative

The ICS separated South African history from General history. The world was understood as Europe, Britain, the United States of America and Russia and the various states of alliance, détente or war amongst them. South Africa had her own focus within the curriculum. The NCS places South Africa in Africa in the world. The overall key questions for this FET band are: How do we understand our world today? What legacies of the past shape the present? The emphasis is on the broad changes and transformations experienced from 1450 to the present, focusing on broad themes such as power

alignments, human rights, civil society and globalisation (NCS, p. 24). The world is understood in a broader way with some focus on China, Africa and India. Each year has a focus on heritage icons and the constructed nature of these. In Grade 10, the case of South Africa is often seen as an exemplar for broader themes, for example, slavery in the Cape Colony is an example of the bigger theme of the ‘quest for liberty’. It is only in Grade 11 and 12 that South Africa has some focus, with the questions ‘How unique was apartheid South Africa?’ and ‘How did South Africa emerge as a democracy from the crises of the 1990s?’

6.7.3 Pedagogy

The theory of instruction in the NCS shows a range of framing relationships, from teacher centred to learner centred. This is essentially a mixed pedagogy. In terms of a specific pedagogy for history, it is clearly skills-based with a focus on developing learners’ historical enquiry skills and ability to analyse sources and evidence. The assessment guidelines require that all tests are source-based.

There are many groups of teachers who have been implementing a skills-based and learner-centred approach to teaching and assessing history since the 1980s and 90s (Siebörger et al., 1993). While this approach may not be new to some teachers, we can assume that there are many history teachers who still teach facts from prescribed books as if these were true and who predominantly use methods which included the question and answer method, the textbook method and the narrative method (Sishi, 1995). These teachers might struggle to make the transition to pedagogy and assessment methods that focus on developing learners’ skills as historians and where the view of historical truth is that it ‘consists of a multiplicity of voices expressing varying and often contradictory versions of the same history’ (NCS, Chap 2, p. 9).

6.7.4 Discourses

The NCS makes the regulative discourse far more explicit. The curriculum requires that teacher's foreground the Constitutional values in their teaching. History is expected to 'promote non-discrimination, raise debates, confront issues and build capacity in individuals to address current social and environmental concerns' (NCS, chap 2, p. 10). The curriculum obviously also relies on the assumption that teachers themselves believe in and behave according to the values of the constitution. At least one empirical study in ten KwaZulu-Natal schools showed that this was not the case (Harley, Barasa, Bertram, Mattson, & Pillay, 2000).

In terms of the instructional discourse, the NCS assessment standards and learning outcomes show that the curriculum demands high level knowledge and cognitive processes, with the majority of assessment standard located in the categories of understanding and analysing conceptual knowledge. The nature of assessment will shift away from discursive essays to source-based tasks. Skills appear to subsume knowledge.

6.8 Conclusion

The curriculum represents the official state view within the official recontextualising field. Using the concepts of framing, classification and instructional and regulative discourses, this chapter has described the changes in the history curriculum as embodied in the National Curriculum Statement (Grades 10 – 12).

The analysis shows that the NCS presents knowledge in a more integrated way than the ICS and that the knowledge is framed using key questions. The knowledge is structured using key historical themes such as power alignments, human rights, issues of civil society and globalization. There is a move away from a Eurocentric position to a focus

on the world. The curriculum clearly understands the role of history as developing Constitutional values. In terms of pedagogy there is a shift from a theory of instruction focused on the teacher to one more focused on the learner. There is a strong emphasis in the NCS on developing the historical skills of enquiry. Assessment standards show that there is a strong emphasis on conceptual rather than factual knowledge, with an emphasis on the cognitive skills of understanding and analyzing.

This chapter presents an analysis of the *intended or planned* curriculum and not of the implemented or actual curriculum. Teachers interpret any curriculum document according to their own beliefs about education, their skills and experience and the resources available (Stenhouse, 1975). The curriculum document undergoes various recontextualisations as it is interpreted and presented to teachers in official teacher workshops, and as teachers make sense of it and implement it in their classrooms. It is this process of recontextualising in teacher workshops and by textbook writers that is the focus of the following chapter.

Table 11: An analysis of the cognitive and knowledge dimensions of the NCS FET History Assessment Standards

Key: 10:LO1:AS3 = Grade 10: Learning Outcome 1: Assessment Standard 3

The cognitive process dimension						
The Knowledge Dimension	1. Remember	2. Understand.	3. Apply	4. Analyse	5. Evaluate	6. Create
A. Factual knowledge	10:LO1:AS3 12:LO1:AS1	10:LO3:AS1 10:LO4:AS1 10:LO4:AS2 10:LO4:AS3 <i>11:LO3:AS1</i>		10:LO1:AS3 <i>11:LO1:AS1</i>	12:LO1:AS3 12:LO3:AS1	10:LO1:AS1
B. Conceptual knowledge	10:LO1:AS2	10:LO2:AS1 10:LO2:AS2 10:LO2:AS3 <i>11:LO1:AS2</i> <i>11:LO2:AS3</i> <i>11:LO2:AS1</i> <i>11:LO4:AS2</i> 12:LO2:AS2 12:LO2:AS3 12:LO4:AS1 12:LO4:AS3 12:LO4:AS2	10:LO3:AS3	11:LO1:AS3 <i>11:LO2:AS2</i> <i>11:LO4:AS1</i> <i>11:LO4:AS3</i> 12:LO1:AS1 12:LO2:AS1	10:LO1:AS4 <i>11:LO1:AS4</i> 12:LO1:AS4	
C. Procedural knowledge			<i>11:LO3:AS3</i> 12:LO3:AS3			10:LO3:AS2 <i>11:LO3:AS2</i> 12:LO3:AS2

Chapter 7

The Pedagogic Recontextualising Field: Teacher training and textbook writers

7.1 Introduction

Chapter 5 described the writing of the FET history curriculum statement and Chapter 6 presented an analysis of this document. These chapters were located within the official recontextualising field (ORF). The recontextualising field is key in creating the fundamental autonomy of education. Bernstein distinguishes between an official recontextualising field (ORF) created and dominated by the state and its selected ministries and agents, and a pedagogic recontextualising field (PRF). The PRF is made up of, amongst others, teacher trainers in colleges and university departments of education, specialised journals, private research foundations and textbook writers. If the actors in the PRF can have an effect on pedagogic discourse independently of the ORF, then there is some autonomy and struggle over pedagogic discourse and its practices (Bernstein, 1996, p. 48). The relative independence of the PRF from the ORF is important.

The purpose of this chapter is to describe some of the work that takes place in the pedagogic recontextualising field (PRF). It describes a provincial training workshop that was offered to Grade 10 history teachers in 2005 as preparation for the implementation of the new curriculum in 2006. It also describes the perspectives of some textbook writers and publishers. The focus is on how the messages are

recontextualised at this level, and on describing to what extent the PRF is relatively independent of the ORF.

Figure 13: The pedagogic device and this chapter

(Form of regulation) Field of practice	Processes	Typical agents	This study
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Academics,	Knowledge structure and procedures of history (Chap 4).
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum writers	Processes of making the History NCS (Chap 5). An analysis of the changes in the history curriculum (1996 and 2003) (Chap 6).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.	Teacher trainers and writers of textbooks.	A description of a provincial teacher-training workshop and a description of how selected textbook writers and publishers understand their work (Chap 7).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Teachers	An analysis of pedagogic practice in three Grade 10 history classrooms in 2005 and 2006 (Chap 8). An analysis of assessment tasks (Chap 9). Teachers' perceptions of the new curriculum (Chap 10)

7.2 Official discourse about history learning

The National Curriculum Statement, the accompanying Subject Assessment Guidelines (Department of Education, 2007) and Learning Programme Guidelines (Department of Education, 2005) carry the official discourse of what it means to learn history in South Africa at this point in time.²⁷ An analysis of the NCS using the

²⁷ The NCS is 62 pages, the LPG is 54 pages and the SAG 37 pages. Together they make up 153 pages of the official discourse of school history.

concepts of classification and framing showed the following:

7.2.1 Curriculum: classification and knowledge integration

There is some loosening of the boundaries between disciplines, as the NCS makes mention of palaeontology, heritage, archaeology, genetics and oral history. There is intra-disciplinary integration, in that the South African and General history sections are no longer separated, but the content is arranged according to key themes.

Knowledge is framed in terms of key questions, many of which make the Constitutional values of the curriculum quite clear. The new FET curriculum structures knowledge in an intensional way, where the French Revolution is only one concrete exemplar of the abstract concept, the 'quest for liberty'. Teachers are expected to make connections and links and ask the following questions listed in the NCS: What sort of liberty, equality and fraternity was involved? How did the ideas play out in the relationships between the French and other people? (eg Africa, Haiti).

7.2.2 Curriculum: the new narrative

The ideology is the emancipation of the African voice and the focus is South Africa in Africa in the world. The over all key questions for this FET band are: How do we understand our world today? What legacies of the past shape the present? The emphasis is on the broad changes and transformations experienced from 1450 to the present, focusing on broad themes such as power alignments, human rights, civil society and globalisation (Department of Education, 2003, p. 24). The world is understood in a broader way with some focus on China, Africa and India., and not just on Europe and America. Each year has a focus on heritage icons and the constructed nature of these. In Grade 10, the case of South Africa is often seen as an exemplar for broader themes, for example, slavery in the Cape Colony is an example of the bigger theme of the 'quest for liberty'. It is only in Grade 11 and 12 that South Africa has some focus, with the questions: How unique was apartheid South Africa? and How did South Africa emerge as a democracy from the crises of the 1990s?

Heritage becomes important, as a way of linking the everyday with history. Learning Outcome 4 focuses on issues of public history and heritage, and it is in this outcome that issues of indigenous knowledge can be explored (Department of Education, 2005).

7.2.3 Pedagogy

The theory of instruction shows a range of framing relationships, from teacher centred to learner centred. This is essentially a mixed pedagogy. In terms of a specific pedagogy for history, it is clearly skills-based with a focus on developing learners' historical enquiry skills and ability to analyse sources and evidence. There is a focus on developing critical thinking and a questioning attitude.

There are many groups of teachers who have been implementing a skills-based and learner-centred approach to teaching and assessing history since the 1980s and 90s (Siebörger et al., 1993). While this approach may not be new to some teachers, we can assume that there are many history teachers who still teach facts from prescribed books as if these were true and who predominantly use methods which included the question and answer method, the textbook method and the narrative method (Sishi, 1995). These teachers might struggle to make the transition to pedagogy and assessment methods that focus on developing learners' skills as historians and where the view of historical truth is that it 'consists of a multiplicity of voices expressing varying and often contradictory versions of the same history' (Department of Education, 2003, p. 9).

7.2.4 Assessment

As others (Harley & Parker, 1999; Kraak, 1999; Muller, 1998) have noted, the South African curriculum is a hybrid showing the characteristics of an invisible, performance mode in terms of pedagogy and the characteristics of a visible,

competence mode in terms of assessment. Pedagogy is focused on the learner, but assessment is focused on the benchmarks that must be achieved. Outcomes and levels of assessment standards are strongly externally framed by the state. However, these outcomes are weakly framed in terms of knowledge. There are extremely detailed assessment guidelines provided on how to develop source-based questions, how many tests to set, guidelines for marking and moderation etc (Department of Education, 2007). Tests must be source-based and it appears that learners do not require a deep knowledge base in order to answer the questions.

7.2.5 Regulative discourses

The NCS makes the regulative discourse explicit. The curriculum requires that teacher's foreground the Constitutional values in their teaching. History is expected to 'promote non-discrimination, raise debates, confront issues and build capacity in individuals to address current social and environmental concerns' (Department of Education, 2003, p. 10). Values are explicitly highlighted and the purpose of learning history goes beyond the individual developing skills and knowledge to envisioning individuals who will work for social transformation and democracy.

7.3 Provincial training workshop for teachers

The key question is: How are these messages recontextualised in the teacher training workshops run by the provincial department of education?

7.3.1 Data collection

I was a participant observer for three days of a four-day provincial training workshop for FET history teachers. The first day of the workshop was generic rather than specific to History, and I did not attend on this day. When I arrived on the second day, I joined a group of teachers at a table and said that I was from the university, and

was attending the course to learn more about the curriculum. My data collection was through detailed field notes, at some points I tried to capture dialogue and discussion verbatim. I wrote down the activities designed by teachers, which were displayed on flip chart paper during their presentations. I also collected teacher profiles of the teachers who attended the workshop through a questionnaire. I had permission both from the KwaZulu-Natal Education Department and the subject advisor who was facilitating the workshop to observe it.

The first step in analysing the field notes was to describe each day's activities according to the various episodes, where an episode is a chunk of pedagogic time when the focus of the activity is the same. The four kinds of episodes in the workshop were: Power Point presentations, group or individual activities/ tasks, report backs from these tasks and general discussion periods. I analyse how much time was spent on these episodes and examine the pedagogic discourse of each. I also present a chronological description of the three workshop days. In this chapter I focus on the key themes that emerged from the workshop. I describe the unfolding of the workshop, with a specific focus on the messages that are conveyed.

7.3.2 Teachers who attended the workshop

On the third day of the workshop, I asked participants to complete a questionnaire (Appendix I) to get some data about the type of schools they taught in, their professional qualifications, how many learners in their schools choose history for Grade 10 etc. There was a return rate 18 of the 26 teachers that were present on the final day (69%).

Ten of these teachers were from urban schools, seven from rural schools and one from a township school. The rural schools levied school fees between R60 and R200 (mean of R127). The urban schools levied fees of between R550 and R6500 (mean of R1775) and the township school fees were R300. Apart from school fees, the other major difference between rural and urban schools was the percentage of learners who

took History as a Grade 10 subject. Two schools (both urban) reported that no learners took history for Grade 10 (which does beg the question as to why these teachers were attending an FET training workshop). The urban schools reported that less than 50% of learners took history for Grade 10 (the percentages given by schools were: 10%, 2x 20%, 2x 25%, 40%, 50%) while the rural schools reported that 45% - 80% of their learners did so (the percentages given by schools were 2 x 45%, 2 x 50%, 60%, 70%, 80%). This may be a result of limited subject packages offered at rural schools.

All the teachers had a professional teaching qualification, and all but one was qualified to teach history at secondary level. The majority had studied history until third year level, two had history to second year level and one teacher had an Honours degree in history. Fourteen of the eighteen teachers had university degrees. Overall the teachers were very experienced, with 14 of the sample having 8 years or more experience teaching Grade 10 history. The mean was 11 years of teaching experience.

Most of the teachers (14) had attended GET OBE training. Most (13 or 72%) said that there was a copy of the NCS at their school. However, none of these teachers had read the whole document before coming to the workshop. Of these 13, eight said that they had browsed through the whole document, two said that they had read the outcomes and content/contexts and three said that they had not read it at all. So of the whole sample, ten (55%) teachers had looked at (but not studied) the curriculum documents before attending the workshop.

Seven of the eighteen teachers said that their school had a set of the *UNESCO General History of Africa Vols 1 – 8*. These books were sent to schools at the end of 2004, under the auspices of the South African History Project, to support teachers to teach content that was new to them (Yonah Seleti, pers. comm.) However, only three of these teachers had used the volumes at all as a teaching resource. Thus only 17% of the sample had ever used the UNESCO books, which were sent out at great expense. Sixteen of the eighteen teachers said that their school was planning to buy

new textbooks for the FET curriculum in 2006.

7.4 Pedagogic discourse in the workshop

The time in the workshop was almost evenly split between three main kinds of activity: Power Point presentations led by the facilitator (32%), group or individual tasks (35%) and report backs on these tasks (27%). The remainder of the time was used for general discussion (6%). A detailed chronology and description of each of these presentations and tasks that made up the workshop is provided in Appendix J. The following section describes what I refer to as some of the ‘key moments’ in the workshop. I focus first on the messages in the presentations and then those in the tasks and report backs. I argue that in the presentations, the facilitator recontextualises the official discourse for teachers, who mostly admit to not having read the curriculum documents themselves.

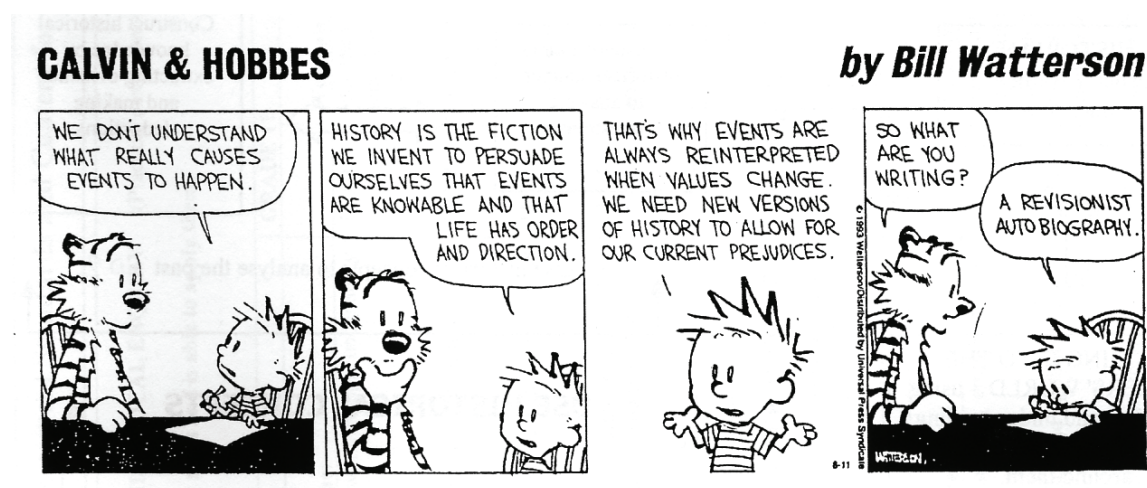
Teachers were each provided with a copy of the curriculum statement, a facilitator and participant’s manual entitled History FET Orientation (this included a lot of the material that was covered in the presentations, some exemplars of essays for marking and a set of sources for some of the key Grade 8 content themes) and a copy of the Learning Programme Guidelines for History.

Power Point presentations were lead by the facilitator and generally consisted of input from the facilitator with very few questions from the teachers. These were generally strongly framed in terms of selection, sequencing and pacing. The presentations that dealt with the key shifts in the curriculum and the assessment issues will be described here, as these are key moments where the official curriculum discourse is made available to teachers through the provincial facilitator. I also show the instances when the facilitator questions the official discourse.

7.4.1 Presentation on the shifts in the new curriculum

This presentation began by looking back over the history of the discipline: the move from the scientific or objective history of van Ranke, the impact of Marx with a ‘history from below’ and then the impact of post-modernism where sources are simply texts like any other. The facilitator appeared to assume that teachers would be familiar with the theory of post-modernism, as this is not clearly explained. He concludes that ‘we tend to use an eclectic approach to historiography today’ and points teachers to a Calvin and Hobbes cartoon (Figure 14), which also carries assumptions about the level of teachers visual cartoon literacy and their understanding of concepts like ‘revisionist autobiography’.

Figure 14: Cartoon used in the FET workshop



The emphasis was on how the NCS has shifted from knowing history to doing history. There was a review of the Learning Outcomes, Assessment Standards and Knowledge Framework of the new curriculum document.

The facilitator related the narrative of the ‘new’ view of history embraced by the FET curriculum which recognizes the African world context; has a strong emphasis on skills and on relevance to individuals and society; is informed by the Constitution; is

not just skills and knowledge, but also values and attitude; it is a method of enquiry through the use of key questions; it involves a lot of debate. This is set up against an old view in which historians created history and facts were absorbed by learners; history was not seen as contested terrain; the approach was uncritical and limited skills were developed (mainly memorization).

Some time was spent examining the curriculum documents with a specific focus on the outcomes and the assessment standards. With regard to these the facilitator says ‘They want a range of different responses, like articles for newspapers, letters, plays, a bigger range of written genres are required. More than just the essay.’ He externalizes the demand for a range of assessment responses by saying ‘*they* want’. He seems to be distancing himself from the document and its demands; we are reminded that this curriculum is strongly externally framed. There is no discussion about what the Learning Outcomes might actually mean, what they might actually look like in a lesson. There seems to be an assumption that teachers know these outcomes, feel comfortable with them, and can quite easily teach so that they are realised. Yet all the teachers who completed the questionnaire said that they had not properly engaged with the curriculum statement and it became clear as the workshop progressed that many teachers did *not* really understand the meaning of the outcomes and assessment standards.

The facilitator goes through the knowledge framework and emphasizes the focus on the key questions, that it is not a matter of teaching the Industrial Revolution or Slavery as it has been done before, but that the key questions give the topic a completely new focus. The curriculum sees South Africa within a world focus, not as a separate section on its own. Western modes of knowledge are no longer seen as dominant, which is why there is a focus on empires in 1450 before the West became so dominant. Epistemologically this represents a massive shift for the curriculum and for teachers. But in the workshop the implications of this shift are not discussed, or problematised. The shift is simply named, as if in the naming it comes to be.

7.4.2 Presentation: How has assessment changed?

The topic of assessment is introduced as ‘the nasty one’, as one of the most important and vexed area of the OBE curriculum. The ubiquitous ‘old’ and ‘new’ table was presented as follows:

Old assessment	New assessment
Frequently norm-referenced Main function to test learners Learners often left guessing as to what is expected of them. One size fits all.	Criterion referenced Outcomes based Main function is to give feedback to learners Transparent – learners know the criteria Varied and individualized to fulfill the needs of different learners.

This was tempered by the facilitator saying that the criteria under ‘old’ might have been true in 1963, but are not completely true now. He also makes his position on group work clear, saying that it is ridiculous that everything is done as group work. A good teacher must vary the techniques, and group work must be productive, well planned with clear outputs. He gives an example of unproductive group work from the National Generic Curriculum training that was attended by provincial officials. ‘We were told to look at a range of policies and to show how they interacted with the new curriculum. But it was pointless, we had no documents’.

He goes through various points about: when do you assess?, what forms of assessment will there be?, who does the assessment?, what do you use to assess?, and how do you provide feedback? These are all listed in the official Facilitator’s and Participant’s Manual. Teachers are told: ‘When you plan in history you plan from the content, not the Learning Outcomes and Assessment Standards. When you plan and assess learning activities, you use the Assessment Standards’. He then describes the official assessment work that is required in Grade 10, namely through: source-based and extended writing exercises, 2 control tests, the heritage investigation, an oral history/ research/ enrichment assignment, the June examination and the November examination. He begins to make his own perspective heard at this point by pointing

out how inflexible this is: ‘To me the flexibility of OBE is quietly disappearing out the door. Can I tell you something very interesting indeed, up to June only counts 25% and the November exam counts 75%. So let us wonder about this, but anyway...’ He is questioning the official line, which is strongly externally framed, by pointing out an inconsistency in the rhetoric of formative assessment, continuous assessment and the actual practice that is in fact strongly summative.

It is striking that for the first time in the workshop, the teachers become animated, and ask more questions than they have done thus far. This issue of assessment clearly ‘touches a nerve’, it will clearly and definitively impact on their practice as teachers. Teachers are not happy with the proposed system. One teacher says

Will there be a minimum mark for the school-based assessment? Otherwise they [learners] can just mess around for the whole year and then still pass the November exam. Where’s OBE? It’s futile, we’re just wasting our time.

Another says very emphatically:

My point is that we’re playing Russian roulette with our children. We’re getting learners from primary schools with very little work ethic, they get away with very little. Now we are asking them to move from 100 to 200 speed. The people higher up don’t realize the harm that they are doing to the children. They have no knowledge base, we have a lost generation...

In response the facilitator answers: ‘This has come from on high, from national...’ As an agent in the PRF he is distancing himself from the ORF.

7.4.3 Presentation: History as enquiry

The subject here is the ‘History as enquiry’ cycle. This means that one starts with a key question, then gathers sources to answer the question, works with the sources (ie analyse, interpret, organize evidence and then synthesise) then communicates the answer (ie. Write a piece of history, have a debate, etc). The presentation also focused on Learning and Teaching Support Materials (LTSMs), and the facilitator gave an example from a British textbook of what a ‘model’ enquiry-based and

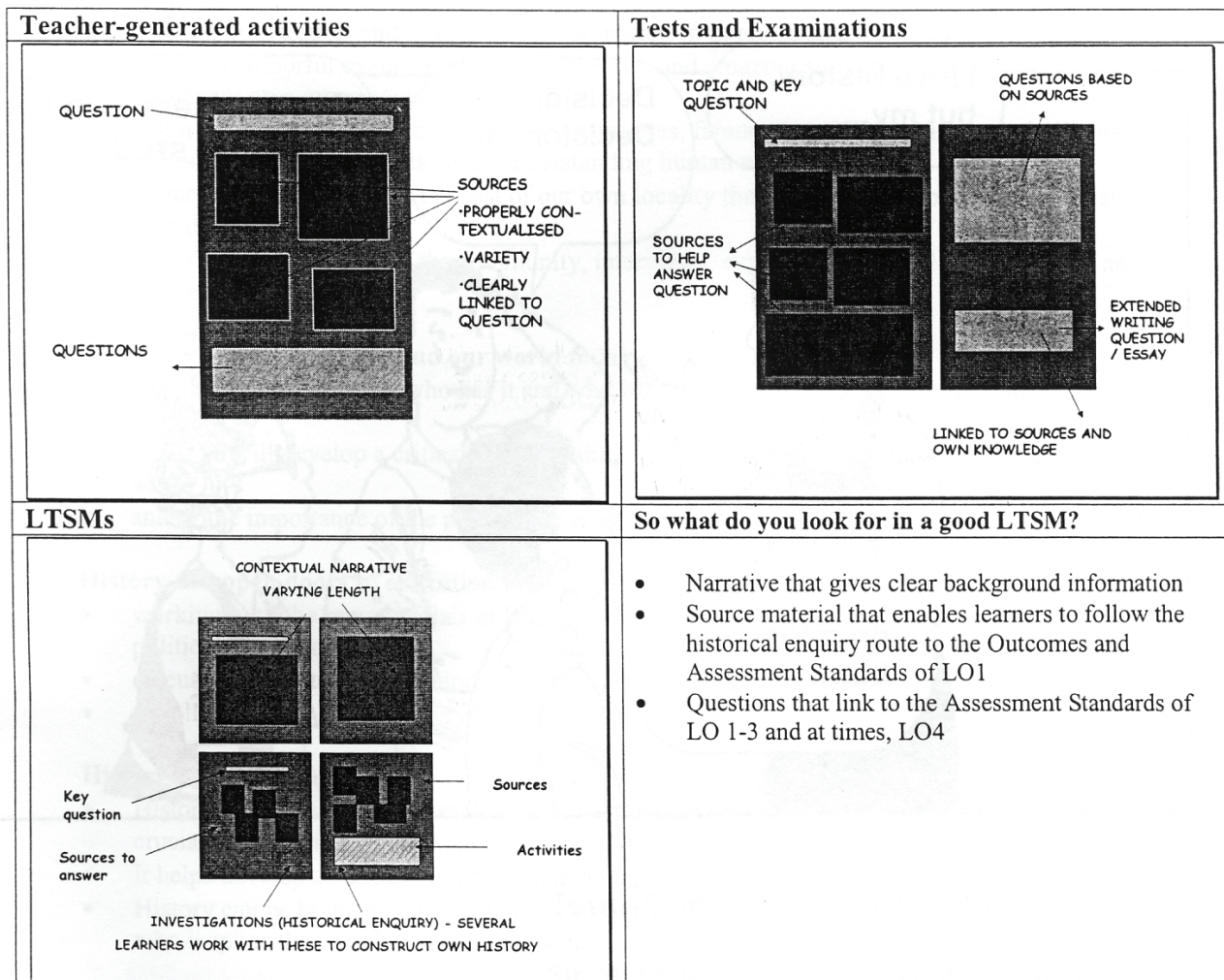
question-led textbook might look like. He does not use a South African example because he has been part of a writing team for one of the textbooks for the new curriculum.²⁸ The workshop material provides clear templates for what teacher-generated activities, and tests and examination and history textbooks should look like. This is very strongly externally framed, very specific instructions as to what these productions should look like (see Figure 15). The facilitator agrees with this approach, and advocates it.

There is not the same emphasis on detail that we've had, it's more about the bigger picture, the process. We can tend to get locked into the minute details and expect that of learners. But the main reason for teaching history is to make learners think, to relate issues to their own lives, the focus must be on debate, arguing, thinking... This is not a watered down curriculum, this is more demanding than the current curriculum. There are huge challenges for us in terms of differentiation.

There are only two questions from teachers here, one is about assessment: 'Will the new exams look like this?' Another teacher comments that the Grade 11s are doing this approach currently, and the problem is that they simply take quotes directly from the sources for their piece of extended writing. There is no response to this problem.

²⁸ The facilitator is recontextualising the curriculum both as a provincial official and as a textbook writer. In each activity the logic is different. For both, he needs to embrace the official discourse to some extent. As a provincial official he is employed by the state, as a textbook writer the interest is to sell as many books as possible.

Figure 15: Excerpt from History FET Orientation Manual (p 14) showing how the ‘history as enquiry’ approach will look in practice



7.4.4 Summary of presentations

These can be described as strongly framed in terms of pacing, sequencing and selection. Pacing and sequencing was occasionally weakened when teachers inserted questions or comments, but this happened fairly seldom. The most questions and comments from teachers were around the topic of assessment. The facilitator embraces the official discourse with regard to the pedagogical shift to an enquiry-based approach. He shows some disquiet at the strong focus on summative assessment where the rhetoric is about continuous assessment. One of the strong themes that emerges is a belief that in the naming of something, it will come to be. He seems to have given no thought to the possibility that teachers might not understand the outcomes, might not know what an enquiry-based approach is. The assumption appears to be that teachers are not using an enquiry-based approach because they did not know that they should, so all that needs to happen is to tell them that they should.

7.5 Pedagogic discourse of group tasks and feedback

Participants were expected to do a range of tasks, most of these were in groups, and one was an individual task. Framing here was strong for the selection and sequencing (F++) and weaker (F+) for pacing, as teachers were given their own time to work out these tasks. Evaluation of teachers' productions from the facilitator was mixed, sometimes it was strongly framed (F++) where he made it clear what was missing from a production, and other times not. Most of the tasks required teachers to work with the outcomes and assessment standards in top-down ways. This was a constant tension as the tasks required teachers to start with the outcomes, but the facilitator would often say that history planning must begin with the content.

I use the data to make some key observations. The first is that a number of teachers are not able to work with the assessment standards and outcomes in meaningful ways. The tasks required them to design activities which 'covered' a particular outcome and mostly they were unable to do this. There is also evidence that many were unable to

design coherent and meaningful questions around a source which they were given. Here I describe some key activities and the feedback sessions. The way in which teachers worked with some of these tasks are described in great detail, as are some of the comments from the facilitator. The detail highlights teachers' ability to work with the 'history as enquiry' approach.

7.5.1 Tasks covering assessment standards

The first task comes after the first presentation on what is history and new history as presented in the curriculum. The facilitator apologises for the long input session and sets the following task:

Use one Assessment Standard and plan a basic activity for learners that will enable them to achieve that AS (25 mins).

The facilitator does not give much detail about how to do this task, the criteria are weakly framed (F-). It appears he assumes that teachers will know how to plan activities, that they have both the recognition and realization rules to do so.

The group that I am sitting with comprises seven teachers. Only three participate in the task to plan an activity, one 'coloured' woman, a black African woman and a black African man. There is a long silence as they look through the lists of learning outcomes and assessment standards. It seems clear that they don't really have a sense of what they need to do.

The facilitator comes over to the group and asks:

Facilitator: Are you trying to work through them systematically?

T1: Learning Outcome 1

Facilitator: This is a tricky one to set up, you are asking them to formulate their own questions. I'd go the other way. What sort of activity do you want them to do? (F+)

T1: We want them to collect information.

Facilitator: How are you going to get them to do knowledge construction? A longer activity. Are they going to write something? If so, what? That's the part that I'm interested in. What sort of activity?

T1: A role-play, the rich king, the rich wife and lots of servants.

T2: What about a poster showing the divisions in French society? At the top, the absolute monarch, the key concepts.
Everyone agrees.

When the different groups present their ideas these tend to be very general, without a clear sense of how the assessment standards would be realized. The evaluation from the facilitator is weak (F-), as he accepts all contributions. The feedback he does give is somewhat contradictory to the task as it was set up: *Use one Assessment Standard and plan a basic activity for learners that will enable them to achieve that AS.*

Don't get locked onto Learning Outcomes and Assessment Standards. One well-planned activity will cover a lot of Assessment Standards at once. Remember the enquiry loop, learners must find out, then learn concepts then knowledge construction. So almost any activity will cover multiple Learning Outcomes and Assessment Standards. Don't get too worried about covering the LO s . The enquiry loop must be kept going. The most difficult one is to get learners to ask questions. ...The problem with the old OBE approach is that it got locked into dealing with AS and LO s. This is a more holistic approach. Don't let the AS and LO s tie you down.

There appears to be some confusion about how teachers should plan. The task clearly asked teachers to plan one activity that linked to a specific AS (this is stipulated in the workshop manual). However, seemingly in contradiction to this the facilitator says they shouldn't get 'locked into' the LO s and AS s. The facilitator focuses on a more holistic approach, once more apparently making a distinction between him and the instructions from the national department (ORF). The key thing that he emphasised is that they 'keep the enquiry loop going'. This thing called 'history as enquiry' is elevated above history as meaning-making, understanding, explaining or interpreting. History knowledge seems to be unnecessary, except as a rudimentary vehicle to 'meeting' the learning outcomes and assessment standards.

Another task which focused on the AS s followed from the presentation on assessment and was introduced as an "old fashioned thing'. The task was to look at an essay topic and decide which Assessment Standards would be covered in this topic.

Topic: *It was the economic factors that resulted in the outbreak of the French*

Revolution in 1789.

Now teachers are being asked to do something different with the AS s. They are to take an essay topic and try to ‘fit’ an AS onto the topic. It is not clear why this would be a useful task – perhaps to show teachers that the AS s ‘work’ even for ‘old fashioned’ essay topics? Only two people in the group²⁹ actively contributed to this task. In the report back the teacher said that LO 3 AS 1 ‘understands and converts statistical information to graphical or written form’ would be covered in this essay topic. The facilitator’s response was strongly framed (F++). He said that the AS identified by the teachers would not be true of this essay topic, as there was no statistical evidence.

7.5.2 Organisational planning tasks

Teachers were required to plan a schedule of work for the year, ie. how would they fit the four sections of work required in Grade 10 into the school year. There are 41 school weeks in the year, but these are not all teaching weeks. Two things are worth noting about the teachers doing this task. The first was that a lot of the school time is taken up with assessment, leaving less time for teaching and the second is the how teachers tried to find criteria for making choices about planning. Teachers had little sense of how long to spend on the new sections since they had not taught these before. The only way they could make sense of the section was to draw on their experience of teaching them in the current system. Their interaction showed that they were not drawing on any history knowledge or framework that might indicate why a particular topic should be taught before another topic. The sequencing of topics was not chronological. The criteria they used were pragmatic.

T1: How long is this slavery?

T2: It depends. The French Revolution is longer than slavery. What if we start with the Industrial Revolution and then do slavery?

T3: Week 1 is out already with timetabling and that. So how long do we need on the Industrial Revolution?

T2: What if we allocate first in terms of terms? What if we give the first four

²⁹ In the group I was sitting in, there were two new men and a woman who had not been present on the first day. She was an Agricultural Science teacher who was attending on behalf of a colleague!

topics to the first two terms and then the other four topics in the last two terms?

T3: I wouldn't devote much time to those topics that are not examinable. What about those that are not examinable, we do them in the beginning. One week on "what was the world like in 1450?" and then the Industrial Revolution and then go onto slavery.

My school takes 2 weeks for internal assessment in the first term, so there are only seven weeks of teaching in Term 1.

....

T3: So how long should we give to the Industrial Revolution? [silence] I would give it 4 weeks.

T1: One month.

When the facilitator showed how he would have done the planning, it was quite different to the way in which my group had planned. Although the task is presented as open, seemingly requiring that teachers make their own choices, in fact it becomes clearer that there *is* a 'right' way of allocating the time. The facilitator reveals the 'legitimate text'!

7.5.3 Tasks covering the enquiry cycle

This is the longest task of the workshop and takes up most of the time of the last day. Each of the five groups is allocated one topic, either slavery, the American War of Independence, French Revolution, Industrial Revolution or Mfecane. Their task is to select some sources (there are a range of nine or ten sources per topic given to teachers in their resource pack), think of a key question and set up 10 questions about the sources chosen. Each question must target particular LO and AS s. Then they need to set a knowledge construction question, which could take a wide variety of forms. The facilitator shows an example of what is expected from the draft assessment guidelines document. The example has three sources and the key question is 'What was life like for the working class in Britain during the Industrial Revolution?' The facilitator says

The key element is setting appropriate questions on the sources. These wonderful planning forms [referring to the official planning forms] mean nothing if you can't do this. The sources should all help you to answer the key question.

I will describe the unfolding of this task in some detail as it shows the criteria that a particular group (the group working on the Mfecane topic) used to select the sources and choose questions.

The group I am sitting with comprises seven teachers, five men and two women. It takes 15 minutes for everyone to read all the sources or to copy down notes about the task. Everyone seems reluctant to take the lead for starting the process. After a further 5 minutes one male teacher says to another teacher (not to the whole group): ‘We need an umbrella question that must be linked to these other questions. Then we must (reads from notes) ‘set a knowledge construction question’.’

The group tries to work out what all the sources are about – someone suggests that they are about what caused the Mfecane. After this, teachers choose different sources in an arbitrary way, despite not having pinpointed a key question. The facilitator says to the whole group that they can look at a page in the participant’s manual for examples on how to set questions on sources. The group turns to this page but it doesn’t seem to shed any light.

Finally, 40 minutes after the start of the activity, one teacher says, ‘Ok, lets decide on one key question that learners would have answered when they’ve done this activity?’ A teacher suggests, ‘What were the internal and external causes that led to the Mfecane?’ This is accepted by the group. They then go on to identify different sources that seem to show the internal factors and those which show external factors. The first question that they write down to ask the learners is to group the sources into those that show internal and external factors. This is identified as ‘fitting’ with AS 2, which is that learners identify sources. They then identify another AS: ‘what about explain historical concepts?’ They look through the sources to find appropriate concepts that the learners could explain, things like missionary, *amabutho*, slave trade. The knowledge construction question is: *Using your knowledge of the Mfecane and the sources, write about the internal and external causes.*

My field notes about this task record the following:

There is no sense of the bigger picture, of what is to be achieved. Its simply technical at this level, teachers are trying hard to manage all the different levels, combining the assessment standards and the key question etc. My fear is that one loses the 'history'.

The groups then present the sources and questions that they have formulated. The facilitator asks the teachers to please critique each other's work, to say what is good, and what is not good about it. Despite this invitation, no teachers offer any comment on any of the work that is presented. The facilitator's own evaluation is quite strongly framed (F++) for this task, where he points out what he sees as the deficits in the teachers' productions.

The group of teachers who worked with the Mfecane topic presents their questions to the group. The facilitator comments that the sources are not about internal and external factors, but in fact show different theories about why the Mfecane happened. The teachers did not recognize the different theories: The Zulu Explosion Theory; the Slave Trade Theory and the Trade Route Theory. How then will they teach this material to their learners in coherent and understandable ways? This seems to show again that essential to the enquiry based approach is a deep, coherent knowledge of the content and context to which the sources are related. If one does not have that, how do you make sense of the sources?

Focus on the assessment standards

The facilitator's feedback on the teacher's productions again reveals the tension between outcomes and content. Although he has previously argued for a holistic approach urging teachers 'not to get locked into LO s and AS s', here his evaluation is mostly about covering the AS s. He is very concerned that teachers have identified the correct AS for their questions. In fact this seems to be more important than the coherence or quality of the questions. For example the group looking at the Industrial

Revolution has drafted the following question:

Estimate the ages of the children in Source 8 (this is a drawing entitled 'Children in a rope factory', see Figure 16).

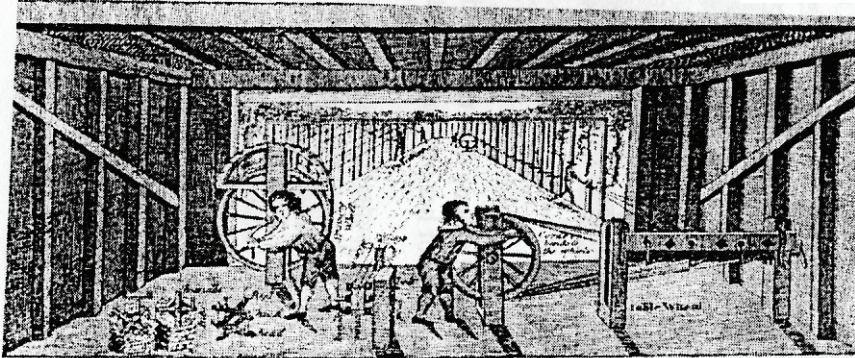
The teachers have said that the question relates to the following assessment standard: *The learner identifies and selects sources of information from those provided to answer the question (AS 10.1.2).* The facilitator questions this, saying that is in fact only about extracting information (AS 10.1.3). His concern seems to be at a technical level of which AS is 'covered', rather than why this would be a meaningful question to ask.

The teachers also choose Source 8B 'A cartoon by Robert Cruikshank entitled 'English Factory Slaves Their Daily Employment' (see Figure 16 below). The teachers have understood this as a literal drawing and ask the question

Where did the child slaves come from?

Figure 16: Examples of sources on the Industrial Revolution given to teachers at the FET workshop

Source 8 - Working Conditions in British Factories. Davies, H.A. :
An Outline History of the World(Oxford University Press) n 477



Children in a rope factory



English Factory Slaves Part 3: Their daily employment. —

Cartoon by Robert Cruikshank

CONDITIONS IN THE FACTORIES

The facilitator is concerned about how learners will answer that out of the cartoon, rather than interrogating whether this is a meaningful question to ask. Other questions developed by this group are:

What were slaves earning? Support your answer.

Extract evidence to show that child slaves were always at work.

If you were one of these children, how would you feel about the harsh treatment?

The facilitator does then say that the source is a cartoon, that it is one person's perspective, a biased view and that the teachers' are treating it as a literal view. He says that the word 'slave' is not meant literally in the cartoon. He suggests that the teachers needed to focus on what the cartoon is aiming to say about child labour in factories – is it a positive or negative perspective?

An obvious one is that it is Cruikshanks' perspective, you could have brought in different perspectives of history. It is a problem asking an extraction question on a cartoon which is a very biased source. Cartoons are always one person's opinion, they have a built-in bias.

I have argued thus far that many teachers appeared to lack the realisation rules needed to work meaningfully in the enquiry-based approach. One of the tasks that they did complete successfully was an individual task where teachers had to read three essays written by learners on the topic *It was the economic factors that resulted in the outbreak of the French Revolution in 1789*. They needed to use the marking matrix that was provided. Once individuals had allocated a mark to each essay, they needed to discuss this in their groups and gain consensus. What was interesting as the groups reported back was the high level of consensus between the groups as to which mark they would allocate to each essay. It seems to indicate that the teachers are familiar with this kind of task and using this matrix. They had both the recognition and the realisation rules to engage with the task successfully.

As the workshop ended, the facilitator made it clear that it is source-based tasks that

form the foundation of teaching history in the new curriculum.

At least once a week, they [learners] need to be engaging with sources. You need to set up activities all the time, so they are actively engaged. The new FET textbooks should be source- rich, they should have lots of sources and activities and not too much narrative text. There should be as little straight teaching as possible, not that that's wrong, but a lot of it is setting up activities. The key skill is how to set questions that actually relate to the LO s and the AS s, that's the most important thing that you can do. At the end of every year every AS should be covered very often.

7.6 Key themes

There are a number of key themes that emerge from the analysis of the training workshop.

The workshop was strongly focused on the 'nuts and bolts' of implementing the curriculum. The major focus was on planning source-based activities, and identifying the correct assessment standards and learning outcomes. Teachers were given a lot to opportunity to actually plan source-based lessons and to work with the LO s and AS s. Teachers spent 39% of the total workshop time engaged in these kind of tasks or reporting back on their tasks. A further 9% of time was spent on the different levels of planning required by the curriculum and on planning how to fit the required content into a year's work.

Very little emphasis was placed on the change in the kind of content, on the fact the curriculum is trying to place 'South Africa in Africa in the world' and move away from a Eurocentric focus. This was mentioned during the first presentation, but was not returned to again. Perhaps this is because the new themes which appear in Grade 10 such as: *What was the world like in the mid-fifteenth century?*, *What was the impact of conquest, warfare and early colonialism in the Americas, Africa and India?* *How did the world change between 1450 and 1850?* and *What are the constructed heritage icons form the period that are celebrated today?* were not to be covered in 2006, as the content was to be phased in gradually.

The purpose and scope of history from the NCS was not examined at all during the workshop. The curriculum statement makes some fairly radical statements about how the study of history should support democracy by for example ‘fostering an understanding of identity as a social construct’ (p. 9) and that it should be a vehicle for human rights through enabling ‘people to examine with greater insight and understanding the prejudices involving race, class, gender, ethnicity and xenophobia still existing in society’. The curriculum statement also mentions the importance of indigenous knowledge systems ‘a body of knowledge embedded in indigenous people’s philosophical thinking and social practices that have evolved over thousands of years and continue to evolve’ (p. 10). There was no place in the workshop to discuss what these things meant, or how they might be realised in the classroom. The values underpinning the curriculum would have been dealt with in Day 1, but there were no links drawn to the subject of history during the following three days. Thus the regulative discourse was not made explicit. Issues of content and values were only briefly mentioned in the workshop, while the major focus was on assessment, pedagogy and planning.

There were a number of assumptions made by the facilitator about the teachers’ knowledge and skills, or about the ideal ‘knowers’. The following assumptions are made: teachers know what post modernism and Multiple Intelligences are; teachers have a high level of cartoon literacy, teachers know how to plan an activity using sources; teachers understand what the LO s and AS s mean, and there is a universal interpretation of these; teachers are able to construct a source-based task if they are shown an example; teachers have the depth of historical knowledge required by an enquiry- based approach.

Teachers did not ask many questions during the three-day workshop. When they did, the questions were about issues that affect them directly in the classroom, and these questions were usually about assessment.

The facilitator occasionally makes known his personal perspective on the curriculum. This was particularly true with regard to assessment, which from his perspective, seems to be becoming more centralised and summative. He distances himself from assessment decisions that are made at national level. He questions the rhetoric of the worth of school-based, continuous assessment, as the nationally set November exam will count for 75% of the year mark. He says:

To me the flexibility of the OBE is quietly disappearing out the door. The problem with the old OBE approach is that it got locked into dealing with LOs and AS. This is a more holistic approach.

He was clearly in favour of the new enquiry based approach, and pushed very strongly that all the assessment standards and learning outcomes had to be ‘covered’. As a person who had written for one of the new textbooks, he would be familiar with the planning cycle as expected by the new curriculum documents.

Many teachers were simply unable to do the final task from Day 4, which was to construct a key question, choose a number of sources, set questions on these sources and set a knowledge construction question. The questions that teachers set were generally banal and incoherent – they often did not lend themselves to meaningful learning. I argue that they simply do not have the depth of knowledge which is required for an enquiry-based approach. It appears that the strong focus on the procedural aspects of history are eclipsing any focus on the substantive aspects of history.

The teachers who attended the workshops were a ‘shifting population’. Not all attended the history part of the workshop for the full three days. Some of the teachers who attended were not history teachers, and many did not teach Grade 10 history. It was unclear why a history teacher would send another colleague to the workshop in his or her place, perhaps simply to ensure that they got the relevant material that was handed out.

7.7 Textbooks

This section is also located in the PRF, but in the field of textbook writers and publishers who recontextualise the curriculum statements. The data here are interviews with people involved in writing Grade 10 history textbooks. I interviewed the publisher and editor of the Grade 10 history book from Publisher A, the publisher and two writers from Publisher B and the commissioning publisher from Publisher C. The interviews took place in 2005. The Grade 10 history books were already published and were ready to be purchased by schools.

The question here is: how is the curriculum statement interpreted and recontextualised by publishers and writers?

7.7.1 External constraints

These publishers had in fact worked with the draft document of the NCS, as their books had to be completed before the final draft was released. There are two key aspects of publishers' work that are extremely strongly externally framed. Firstly, they work under very tight deadlines determined by the Department of Education and secondly, they must work very closely to the NCS, the Subject Assessment Guidelines and guidelines from the provincial textbook evaluation teams.

The Department sets deadlines for the submission of textbooks to the provincial textbook evaluation process. Regarding the constraint of the timeframes for writing, one publisher said:

The provinces don't understand the publishing industry...How do you explain to them that there is at least 18 months for writing, editing, doing the art work, then the marketing takes another year for them to place orders, but they are shortening that. It's often politically driven (Publisher A).

The stress and the deadlines... we haven't necessarily produced the best books, we've produced the best books in the time available, and I think that's a bit sad (Publisher C).

All Grade 10 textbooks had to be submitted to the evaluation panels in each province in order to be accepted and then placed on the list of accredited textbooks for that province.³⁰ It is vital for publishers that their books are placed on the accredited list, or they will not make any sales. The provincial evaluation teams are comprised of teachers.

Although they recognised that the evaluation process was necessary in that it ‘set the standard’, publishers felt that the quality of the evaluation comments was erratic. Sometimes the comments were simply technical, seemingly because the team did not understand that what they were looking at was a manuscript, and not the actual book as it will look when published. So they make comments about the poor print quality, or the poor paper quality. Or it appears that they have not read the manuscript carefully.

[Reading from a provincial evaluation report] ‘Conditionally approved, pending the inclusion of the following: heritage section, oral history, indigenous knowledge, and archaeology’. Now they accused my book, but it had those things. There’s a whole chapter, so obviously someone had not looked at the book carefully. I sent a letter, saying look at these pages, and then it was accepted (Editor A).

Some of the comments are quite random and ridiculous. I had one comment that we hadn’t included Indigenous Knowledge from the rest of the world, and that we didn’t have enough detail on Saartjie Baartman, and of course she is there... (Publisher C).

One province says they want LO s and AC s spelt out at the beginning of each activity, and another would say, no we don’t want that. We’ve actually had books where we’ve changed them to suit one province... (Publisher A).

It is clear that the publishers write with the evaluation panels very much in mind.

We don’t mess with the content order. They [evaluation panel] want it like it looks in the curriculum statement....So with the Grade 11, I have made sure that we don’t change the linear order of the curriculum (Publisher C).

The following figure details the guiding criteria that textbook writers need to comply with.

³⁰ The procedure changed after 2006, when the evaluation of textbooks was centralised. All books are now submitted to one national evaluation panel, rather than to each province separately.

Figure 17: Guiding criteria for FET subjects from the National Department of Education

GUIDING CRITERIA FOR FET SUBJECTS: ALL SUBJECTS

SECTION 1: CONTENT/CONTEXT	
1.1	The textbook covers all the Learning Outcomes (LOs) and the Assessment Standards (ASs) of the subject.
1.2	The textbook covers the suggested content and this is appropriately sequenced.
1.3	The content is suitably paced and the weighting of LOs is appropriate.
1.4	The content is current and up-to-date.
1.5	The content places learning in context i.e. integrates Assessment Standards within the subject to give learners an authentic learning experience.
1.6	The content is appropriately scaffolded.
1.7	There is clear integration of theory and applied competence.
1.8	The content is sensitive to diversity e.g. culture, religion, gender, etc.
1.9	The textbook provides a variety of meaningful activities for individuals, pairs and groups.
1.10	The level of the content is appropriate for the specific grade.
1.11	The language used and vocabulary are appropriate for the grade and language level.
1.12	Key concepts and terms are clearly defined.
1.13	The language and vocabulary are correct and appropriate for the subject.

SECTION 2: LEARNING ACTIVITIES & ASSESSMENT	
2.1	Learning activities and assessment tasks are derived from Learning Outcomes (LOs) and Assessment Standards (ASs).
2.2	The textbook presents the learner with learning and assessment activities appropriate to the subject.
2.3	Assessment tasks are aligned to the Programme of Assessment as described in the Subject Assessment Guidelines (SAG).
2.4	A variety of learning activities and assessment tasks are used.
2.5	Learning and assessment targets learner achievement at different levels of complexity.
2.6	Learning and assessment tasks are clearly formulated and unambiguous.
2.7	Assessment tasks and learning activities provide for daily assessment.
2.8	Learning and assessment tasks allow for expanded opportunities for learners.
2.9	Learning activities and assessment tasks are appropriately scaffolded.

2.10	Assessment activities reflect the integration of Assessment Standards (ASs).
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SECTION 3: LAYOUT, DESIGN AND OVERALL QUALITY	
3.1	The text is structured, using headings and subheadings.
3.2	The font and typeface are clear and easy to read.
3.3	The illustrations and diagrams are clear and relevant, without bias.
3.4	The paper is of a good quality and bound securely. ¹
3.5	The textbook has table of contents with clear reference to chapters and page numbers. ¹ If a draft copy/manuscript is submitted a clear indication of this must be given

SECTION 4: TEACHER GUIDE	
4.1	Provides clear and systematic guidance on the use of the textbook.
4.2	Provides examples of a work schedule which speaks to the content, sequence and pace of the Learner's Book.
4.3	Includes an exemplar assessment plan for the grade which speaks to the formal assessment tasks in the Learner's Book.
4.4	Provides memoranda, check lists, rubrics, etc. that match the assessment tasks in the textbook.
4.5	Provides suggested answers/solutions/memoranda/assessment tools for learning activities/exercises.

SECTION 5 – SUBJECT SPECIFIC ISSUES

HISTORY	
5.1	The textbook provides learners with guidance of how to: <ul style="list-style-type: none"> • Identify, select and access relevant sources of information • Extract information from sources • Analyse, interpret and evaluate information and data • Engage with and analyse historical sources.
5.2	All sources of illustrations, diagrams, cartoons must be fully acknowledged as the acknowledgement also provides information needed.
5.3	Topics are framed using key questions.
5.4	Organising themes of content are recognisable.
5.5	The volume of content suggested is appropriate for the 4 hours per week allocated to the subject.

What is striking about this list of criteria is that the very first criterion is about whether the Learning Outcomes and Assessment Standards have been covered. The discourse of OBE subsumes everything else. Even the criteria for the subject specific focus on history (Section 5) appear to care little for the way in which the content is written. The first criterion is that the textbook enables learners to work with historical sources. This is an interesting shift from other South African history textbook analyses in the 1980s and 1990s, where content and ideology were the key focus.

In the early 1980s it was fashionable to use the work of Althusser to examine how history textbooks function as part of the ideological apparatus (Chisholm, 1981). In a similar vein, a UNSECO study of eleven official history textbooks showed that they legitimated the social order of apartheid through pervasive ethnocentrism, the glorification of nationalism, the presentation of the past as a model for the present, the presentation of the historically contingent as natural and inevitable, the perpetuation of myths, the discrediting of counter-ideologies, the assumption of black incompetence and racism and stereotyping (Dean, Hartmann, & Katzen, 1983).

Although Marxism and related theories have generally fallen out of use, it is interesting that no one seems to be asking these, or related questions about the new crop of textbooks. The departmental criteria do not ask if the new textbooks perpetuate myths or glorify nationalism. These kinds of questions were asked of textbooks in an audit commissioned by the South African History Project of 'apartheid textbooks' in 2002. The list of questions used in the audit did specifically interrogate how African and South African history is represented. Some examples of questions asked in that audit are: Are independence struggles and post-colonial problems presented as if all African countries experienced the same problems in the same way? Is black urbanisation represented as if it were purely voluntary? Is the gold mining industry presented only in a positive light? (Kros, 2002). However the work of this report does not appear to have informed the departmental criteria for textbooks in 2006.

The DoE seems to be more interested in whether the new textbooks ‘look modern’ (to use Fuller in a different context) in that they have a range of sources and activities and have the learning outcomes and assessment standards, rather than looking substantively at their content. Why is there not a set of criteria to assess whether the new textbooks contain racism and stereotyping, glorify nationalism, perpetuate myths, take a Eurocentric perspective etc? It is as if ideology no longer exists in the new South Africa.

The only thing the DoE seems concerned about in terms of the content of history textbooks in particular is that they are organised according to recognisable themes and that the volume is acceptable. The assumption appears to be that if textbook writers cover the content stipulated in the curriculum and use a range of sources and activities, all will be well.

7.7.2 Who writes the textbooks?

All three publishing houses used both teachers and academics as writers. They look for good teachers who understand the methodology. In all three cases the work of academics was often ‘over written’ to make it acceptable for an OBE curriculum. One of the publishers felt that academics were not interested in learning to write in a different way.

The professor...he’s just not interested. He’s looked at the content, he’s considered the learning outcomes, but he hasn’t thought, ‘what would 16 year olds like to do with this material? (Publisher C).

The writers are trained in the way of writing required by the curriculum, but often the editor does substantial re-writes and puts in other sources, different activities and links to indigenous knowledge, for example. Teachers who write textbooks tend to be working in well-resourced schools, because they have been using the methodology for a long time, they’re easier to work with, they have telephones, they have cell phones, they have cars, they can get here for meetings. You go to people who are more in

touch with learners in the black classrooms... but working with our pressure, with the best will in the world, you find you have to dump these authors, or baby them along, or make them consultants... Time is a big thing, everything has to be done so quickly because there is a political agenda (Publisher A).

All the six people I interviewed were white women, but this is not to say that the majority of people who are writing current history textbooks are white women. There is certainly a greater range of people writing textbooks now, and generally a textbook will be written by at least three or more authors. This is different from textbooks used in the 1970s which were generally written by white men, for example, F.A. van Jaarsveld, A.N. Boyce, C. Joubert and D. Jooste, B.E. Paynter (Dean et al., 1983, p. 114). Two of the publishers had contacts with people who had written the FET curriculum statement, and at least three people who were involved in writing the NCS have authored history textbooks.

There do not appear to be any official guidelines as to whether departmental officials and curriculum writers should be allowed to write textbooks. The History Education Group conferences, which brought together groups of history educationalists and teachers in 1992, recommended that 'Inspectors and departmental officials should not be permitted to write textbooks while holding office' (History Education Group, 1993, p. 53). Ironically, some of the History Education Group have since become 'departmental officials' in that they were curriculum writers and are now also writing textbooks!

There are obviously networks of textbook writers whom publishers draw on. One publisher said:

You choose them for their skills, but its often word of mouth, and its often very difficult to get good writers, because they are all, everyone is trying to work with them... But I just talk to people and get them to send in CVs and are they good to work with, do they deliver, get some samples of their work. Only in the most utmost desperation will you take a chance (Publisher C).

Textbook writers do not get paid directly for their work, but rely on royalties, which depend on the extent of the sales of the book. Writing a textbook can be a very lucrative practice if large numbers of the books are sold. Writing for a new curriculum can be particularly lucrative since all schools will buy textbooks for the new curriculum. In the case of the new FET curriculum, many provincial departments provided schools with money to purchase new textbooks in 2006, so sales were high.³¹

It appears that it is difficult for textbook publishers to find authors with the right combination of content and methodology skills. In the light of this, it seems strange that the curriculum expects all teachers to become materials developers and create their own source-based activities. The skills of 'writing OBE' are highly prized and the writing of academics is often reworked to fit the particular criteria of activity-based and source-based texts.

7.7.3 How are the curriculum documents interpreted by writers?

Overall, there was a sense that the publishers agreed with the pedagogical stance taken by the new curriculum. No one questioned the enquiry-based approach. Generally the interviewees were positive about the changes to the history curriculum, which they interpreted as a shift to an enquiry-based history.

The writers have to work with sources, engage the learners and the teacher. And then that activity that is set to enable them to work with the sources, compare them, extract information...I had all the learning outcomes and I followed those very carefully, always ensuring that they were doing one of those outcomes...then you have to assess if that outcome has been achieved...then you have to bridge into the real world. So what use can you make of that knowledge, how does it affect you in your daily living? (Editor A)

One publisher describes the commissioning workshop where authors will go through the curriculum document and will decide who will write which chapter. Sometimes

³¹ As an example, one author who wrote 50% of a Physical Science Grade 10 textbook received royalties of R90 000 in 2006 from the first year of sales.

authors did not agree with the curriculum statement, and there were definitely debates about content during the commissioning workshops.

And then someone will say ‘well I’m not writing about Africa’s economic recovery, because I don’t believe in it, so who will do that?’ Or ‘I can’t write on globalisation because obviously you are writing a government textbook’, and someone will say that ‘I won’t be able to write what I think I’m supposed to write on this, so someone else better tackle it’. Or I said you have to write, but I’m going to neutralize it, because we... the learners have to decide what they think, you have to show a balanced view of both arguments. But if someone feels strongly in a certain way, they’ll be inclined to present more evidence in a particular direction. Amazing what you can do with the odd word (laughs). So a person will forewarn me first, and say ‘I can try but you are going to have to balance it, and make sure it’s a fair portrayal of both sides’.

But in that commissioning room, it’s a room of very knowledgeable academic people, very confident, with very certain ideas, quite a lot of tension in the room, its not the funnest day (laughs). Its an emotional and political subject, there’s a lot of disagreement, not outright...(Publisher C).

So while there is a sense that publishers are constrained by Departmental guidelines in terms of the look of the book, and the inclusion of learning outcomes, assessment standards and references to indigenous knowledge, there is some leeway in terms of the interpretation of the content.

According to the NCS ‘indigenous knowledge systems in the South African context refer to a body of knowledge embedded in indigenous people’s philosophical thinking and social practices that have evolved over thousands of years and continue to evolve’ (p. 10). Different publishers understood indigenous knowledge in different ways, and none questioned the usefulness of including it in the textbooks. One publisher understood this as relating the history knowledge to the learners’ world, to their lives. This can be seen in the following example:

...For the Industrial Revolution, looking at a drop of London water as seen in Punch magazine, and a “Stop and think” (reads from textbook) *In SA water in rivers and dams can become contaminated. Has this happened in your community? What steps were taken to improve the situation? Ask your family whether they can tell you of such a situation. Find out what can be done to prevent the spread of germs in a water source.*

You see, relating to their world, and becoming aware of the community and where they live. *Create a poster with these rules for basic healthy living* and that kind of thing. So I've done that all the way through which is relating to their community, their local lives (Editor A).

This represents a weakening of the classification boundaries, and also suggests new recognition and realisation rules. One wonders why history learners should be thinking about rules for healthy living, which seems to be more appropriate in an environmental education or life orientation lesson. This task may 'link to their local lives' but it is hard to see how it would enhance their understanding of history in any way.

Another publisher understood indigenous knowledge in the following way:

I think things that would enhance a better understanding of South Africans for other South Africans. I think there are lots of misunderstandings and knowledge gaps in why things are done, and those things need to be explained. It's quite difficult because you have to thread it through the content and bring up a debate...

Because we do need to understand, and its not only black South Africans, its all South Africans, everything from Afrikaans culture, Indian South African culture, from cooking to dancing to beadwork, to understanding religions and ways of doing things (Publisher C).

Writers for one book said that one way of understanding indigenous knowledge was to focus on the oral traditions and oral sources and the role of the community historian. They tried to include the African voice through, for example, African perceptions of Europeans.

It is striking these are each very different understandings of the concept of indigenous knowledge, from relating knowledge to learners everyday lives, to including material that would better enhance learners understanding of other South African cultures to a focus on the African voice through oral sources. Since the evaluation panels accepted all of these textbooks, it seems that what it is important is that indigenous knowledge is seen to be present, rather than the substantive form that it takes.

7.7.4 Analysing the textbooks

This chapter has relied on interview data from writers and publishers of three new curriculum textbooks. A brief look through four Grade 10 books shows that all cover the key questions and content required by the curriculum statement, and all have a strong focus on sources, source based questions and other activities. Chunks of content text tend to be kept to a minimum, though some books have more text than others (see examples in Appendix M5 and M8). The books also differ in the extent to which they list the LO s and AS s; one book has these listed on each page and linked to every activity, another one does not.

It is not possible here to do any in-depth study of the textbooks but this is clearly a very important further area of research. Key questions would be about the substance of the content, the meaningfulness of the activities and the kinds of writing that is required of learners. It would also be interesting to study of how teachers actually make use of the textbooks, how they make choices and selections from textbooks. There is growing research from a cognitive perspective in the United States which examines how learners actually learn history from text (McKeown & Beck, 1994). There is also potential for in-depth study of the text from a systemic functional grammar perspective to discover how the discourse is in fact constructed (Coffin, 2006a, 2006c; Veel & Coffin, 1996). There are a number of recent textbook studies from the Russian Republic and Eastern European countries that have also gone through political changes in the last decade, which examine how the content and ideology have changed (see 2007 issue of *Compare*). For example, Torsti (2007) examines textbooks in Bosnia and Herzegovina to see how national groups are represented and how issues of reconciliation and reconstruction are dealt with in a post-war society

7.8 Conclusion

This chapter has described the recontextualising process that happens in two fields of the pedagogic recontextualising field (PRF), namely the teacher training workshop facilitated by a provincial department official, and the writing of textbooks. The aim has been to track how the official message is changed or elaborated in these recontextualising processes.

In the teacher training, about a third of the time was taken up by strongly framed presentations, a further third was teachers doing particular planning or assessment tasks and the final third was taken up by report-backs and feedback on these tasks. The facilitator was strongly in favour of the new enquiry-based approach to history, but was somewhat critical of the assessment procedures that he thought were centralised and rigid, rather than flexible. Teachers were given an opportunity to practically design learning activities based on the ‘history- as- enquiry’ cycle. However, it became very clear that many struggled to develop historically meaningful questions based on the sources that were chosen. The facilitator’s feedback on this task was very technically oriented towards ‘covering’ the learning outcomes and assessment standards. Overall the workshop focused on the practical issues of pedagogy and assessment, and issues of values and content were mentioned only very briefly.

Chapter 8

The field of reproduction: Pedagogic discourse in three secondary schools

Pedagogy is a sustained process whereby somebody(s) acquire new forms or develops existing forms of conduct, knowledge, practice and criteria from somebody(s) or something deemed to be an appropriate provider or evaluator...

Bernstein, 2000, p. 78

8.1 Introduction

This chapter explores the field of reproduction at school level. It describes the pedagogic discourse in history classrooms in three case study schools. Each case study introduces the school and the history teacher there. It uses data from school visits, classroom observations and interviews with the principal, history teachers and learners to present a picture of what teaching and learning history looks like at each school. The classroom data presented here are analysed using the key concepts of classification and framing. There is not space in this chapter to compare the pedagogic practices across schools and I do this in Chapter 9.

Although sampling, data collection and analysis has been described in detail in the methodology chapter, I will review key points here. There were two interviews with the teachers at Lincoln and North Hill, one in 2005 and one in the second half of 2006 to hear the teacher's understanding and experience of teaching using the new curriculum. At Enthabeni, Mr Mkhize was interviewed in 2005 and Mrs Shandu in 2006. A content analysis approach was used.

I observed and video recorded five lessons in each school in 2005 and 2006. These were transcribed and the data were analysed using the concepts of classification and framing to give rise to a description of pedagogic discourse in the classrooms. In order to describe the conceptual demand of the lessons, in-class learner tasks and assessment tasks were analysed using indicators from Bloom's Revised taxonomy. Questions asked by both learners and teachers were counted and analysed. The methodology chapter describes how and why Bernstein and Bloom were used.

Assessment tasks (homework tasks, tests and exams) which learners were required to do and copies of learner portfolios were collected from each school over the two years. These were also analysed using indicators from Bloom's Revised taxonomy.

Figure 18: The pedagogic device and Chapters 8, 9 and 10

(Form of regulation) Field of practice	Processes	Typical agents	This study
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Academics,	Knowledge structure and procedures of history (Chap 4).
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum writers	Processes of making the History NCS (Chap 5). An analysis of the changes in the history curriculum (1996 and 2003) (Chap 6).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.	Teacher trainers and writers of textbooks.	A description of a provincial teacher-training workshop and a description of how selected textbook writers and publishers understand their work (Chap 7).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Teachers	An analysis of pedagogic practice in three Grade 10 history classrooms in 2005 and 2006 (Chap 8). An analysis of assessment tasks (Chap 9). Teachers' perceptions of the new curriculum (Chap 10)

8.2 Enthabeni Secondary school

Enthabeni is a school that was administered by the Department of Education and Training. It is 60 kms from Pietermaritzburg. The school is located in a rural area, about 20kms from the nearest town. The staff and learners are all black African.

There were 821 learners registered in 2004. There were 24 teachers and none are funded by the School Governing Body. The only person employed by the SGB is the security guard. There are four Grade 8 classes with an average of 47 learners per class. This

number dwindles to two Grade 12 classes of 35 learners per class, so less than 50% of learners who start in Grade 8 reach Grade 12. The school accepts all the learners who apply to the school. The matric pass rate was 86% in 2003 and 88% in 2004. The fees are R150 per annum. The majority of learners live in the area and walk to school. According to the principal, only 10% of the parents are working. He estimates that more than half of the learners stay with their grandmothers.

The school consists of three blocks of classrooms, and a small administrative block. The administrative block consists of two offices, one of which is shared by the principal and the administrator. The deputy principal and the HoDs use the second office. The principal's office also houses the photocopier and television set. Only the female teachers use the room designated as a staff room. The male teachers use a room planned to be a laboratory as their staff room. Each teacher has their own desk in the staff room, which are piled high with marking.

There are no specialist rooms. The library contains a set of bookshelves on one wall. There are about 200 specimen textbooks (left by various publishing companies) and a set of old World Book encyclopaedias. It is used as an office by the English HoD, and does not appear to function as a library. Learners did come to read the daily newspapers there (there was both an English and Zulu newspaper). There was a room with computers but these were not functional and were not used. In terms of lesson time, learners stay in their classrooms, and teachers move from class to class.

The school offers netball, soccer and cricket, using community sports fields. There are no sport fields on the school grounds. Although there are flush toilets, these are often not working, so the pit latrines were still in use.

According to the deputy principal, the biggest challenge facing the school is the poverty of the community. He said the area was badly affected by violence in the 1980s and the community is still battling to rebuild itself.

An issue that has been alluded to by other researchers is the number of days ‘lost’ to teaching and learning in many South African schools. This was certainly evident at Enthabeni. For example, during the first block of fieldwork in October 2005, there was no school on the Friday due to a soccer match. The second Friday no teaching and learning took place as all the learners were going to the sea for the day. For a week during August 2005, no teaching had taken place, due to the IQMS process.

This situation was exacerbated by the proliferation of testing in schools. For example at Enthabeni, all teaching and learning stopped on 20 October 2006 and examinations began. Learners do not return to school again except to write exams, and then go home once the exam is written. This means that essentially 30 days of timetabled school days are lost to teaching and learning at the end of the fourth term.

8.3 Mr Mkhize, the Grade 10 history teacher in 2005

Mr Mkhize started teaching at Enthabeni at the beginning of 2005, thus has been there only 10 months at the time of the first fieldwork. He worked as a private, unqualified teacher for three years before he went to university. He studied for a BA, taking sociology and history as a minor subject. After his BA, he did a Higher Diploma in Education. He trained to teach Tourism, Geography and Zulu. He also has an Honours degree in Human Resource Management and is considering furthering his qualifications in education. Before starting at Enthabeni, he had taught at rural schools in Northern Zululand for 4 years, teaching history and Life Orientation.

He said he’d enjoyed teaching even as a primary school child when if the teacher was not in the class, he would help the other children. At university, other students would come to him on a Saturday and ask him to help them with sociology. He would run discussion groups for fellow students. He said ‘I decided to become a teacher because sometimes I know how to explain things.’ He chose to teach history because he likes it, and enjoys comparing the past with things that are happening presently. His main aim of teaching

history is to make the students aware and to understand that problems they have encountered here in South Africa have happened before in other countries.

He feels that the subject of History is most similar to Tourism and Geography because when people move to other places, they need to know the government of that area and understand the environment, understand the people their lives and the way that they behave.

He feels that the learners ‘need a lot training, you need to train them, they must be exposed to many things. If you talk about something you must relate to it or you must try to make them to do it practically, you see.’ He also used the word ‘train’ a lot in terms of learners not knowing how to write an essay, saying they need to be trained to write a proper essay. His understanding of a good history essay is that learners must stick to the facts: ‘its better to write facts so that they are going to get marks’.

For Mr Mkhize, the learners that are good at History are ‘those who listen and those who concentrate’. This shows his understanding of history is as a body of knowledge to be transmitted. He gives them guidelines to focus on for tests and the good learners are those who go and prepare these sections. The others are ‘lazy, it’s not like they don’t understand, problem is that they don’t concentrate, they don’t pay attention in history, you see?’ Mr Mkhize felt very frustrated by the lack of parental involvement in the students’ learning. He said ‘If you want to meet a parent about their child’s progress, they say ‘my parent is not at home, he is working far away’’. Parents do not sign their children’s reports.

8.3.1 Understanding of curriculum changes

At the time of the interview (October 2005), Mr Mkhize had heard no information about attending any FET training workshops. His understanding of the curriculum changes was based on the general learner-centred shifts indicated by C2005, rather than any specific to history:

...you mustn't use, you know, this old system of teacher, you see, where the teacher dominates in class. You must work and participate with the students, where the students must talk and demonstrate and use group work...

His understanding of OBE is that all students need to pass even if they don't know anything. He is very concerned about the issue of punishment. He wants to punish learners who will not work but teachers are not allowed to. There was a deep sense of powerlessness in the light of the things 'the government says'. For Mr Mkhize control and pedagogy go together:

I don't know how I am going to cope with these things...how can you teach the child when you won't control the child? They want to control you, you as the teacher! So they can behave anyhow, and you are not allowed to punish them. It's really frustrating.

8.3.2 Professional identity

Mr Mkhize has taught a range of different subjects, so his identity as a *history* teacher is not that strong. He never specialized to teach history. His focus on teaching history is linked to his belief that the main aim is to make the students aware of links between problems encountered in South Africa and other situations around the world. He set essays for the Grade 10 learners on issues like government service delivery, Jacob Zuma and the World Cup 2010. He wants learners to be aware of current issues and think about how to solve these problems. His saying that Tourism and Geography are school subjects closest to history seems to show that his focus is on content rather than on the procedures of history. His focus on history teaching could be labelled as 'history as facts'. This is backed up by his contention that it is the learners who "listen and concentrate" that do well in history. At no time did he mention any pedagogic issues or show an understanding of history as the interpretation and analysis of sources.

8.4 Learning and teaching in Mr Mkhize's classroom

Mr Mkhize's classroom had no identity as a history classroom as the learners stay in one classroom, and the teacher moves from classroom to classroom. The classroom in which

he taught Grade 10 history had no posters or pictures on the walls. The desks were arranged in rows, close together, making it very difficult for a teacher to move between the rows. The classroom could accommodate 64 learners (which is the official number of learners in Gr10A in 2005), although there were never more than 48 learners in the lessons that I observed. There is only one history class in Grade 10, so there was no selection of which class I should observe. Mr Mkhize felt that my presence in the classroom made the learners shy to answer questions in English, because they normally answer in Zulu.

8.4.1 A detailed analysis of one lesson

Although I have chosen one lesson to analyse here (see Figure 19 for the detailed analysis), all four lessons that I observed were structured in the same way. Mr Mkhize used only two variations of teaching. Firstly he would explain a topic, and then he would ask questions on that topic.

In Episode 1, Mr Mkhize explains the causes of the French Revolution, sometimes reading directly from the textbook. This episode lasts for just over 22 minutes (83%) of the lesson. The episode is strongly framed in terms of selection, sequencing and pacing, but more weakly framed in terms of the evaluative criteria. Learners are not required to complete any task, so it is not possible to categorise the evaluative rules in terms of making the requirements for creating the legitimate text explicit.

Figure 19: Detailed analysis of a lesson taught by Mr Mkhize: Enthabeni (E2005/1)

E 2005/1 (11 Oct 2005) Topic: French Revolution											
Epi- sode	Duration Mins Secs %	Kind of activity	Description	Framing					Classification		
				Selec- tion	Sequenc ing	Pac- ing	Evalua- tion	Inter- disciplinar C++	Intra- disciplin C++	Inter- discursiv C++	
1. 00.00	22.35 1355 83%	Content based teacher talk	Teacher explains the causes of the French Revolution, sometimes reading from the textbook	F++	F++	F++	F-	C++	C++	C++	
2. 22.35	4.39 279 17%	Teacher-led question and answer	Teacher revises the lesson by asking questions relating to the material covered in the earlier part of the lesson.	F++	F++	F++	F-	C++	C++	C++	
END 27.14	27.14 1634 100%										

Episode 2 is a revision of the work just explained, and the teacher leads a question and answer session. Again this episode is strongly framed in terms of selection, sequencing and pacing. However, in the kinds of verbal answers required by learners, learners are seldom required to give a reason for their answers, incorrect answers are not always corrected and the teacher does not elaborate on a correct answer (F-). The evaluative criteria are weakly framed. For example in the following exchange the learner gives an incorrect answer to the question ‘what does autocratic mean?’ but the teacher does not make explicit that the answer is incorrect, but looks for a different answer.

T: Why was there a problem or why did the people of France have a revolution?
Ja?

L: The king was an autocratic leader.

T: An autocratic leader, that means what? The king was an autocratic leader, it means what? Yes?

L: The king was corrupt.

T: The king was corrupt. Okay, what else can you say?

Although the lesson is scheduled for 45 minutes on the timetable, it lasts only 27 minutes.

8.4.2 A description of pedagogic discourse

Hierarchical rule

In terms of the hierarchical rule (the extent to which the teacher and learner have control over the order, character and manner of learners’ conduct), Mr Mkhize has little need to explicitly discipline learners. This may have had something to do with my presence in the classroom, because during our interview he spent a lot of time talking about problems with lack of discipline. He takes control of the lesson through strongly framed selection, sequencing and pacing. Learners appear to be aware of the evaluative rules for the regulative discourse, which are that learner contributions can only be elicited by the teacher.

Framing rules

Pacing, sequencing and selection are all very strongly framed. The learners do not contribute to the lesson unless the teacher asks them a question. The pace of the lesson is slow in that the second half of each lesson is spent in recapping the work covered in the first half of the lesson.

Classification

Classification is strongly framed at the interdisciplinary and intra-disciplinary level. There is no mention of any other subjects, nor any other topics in history. At the inter-discursive level, there are a few instances where everyday knowledge is introduced into the classroom.

In one instance in 2005, Mr Mkhize draws an analogy between urban tenement slums in industrializing Britain and the informal settlements that learners are familiar with in South Africa. It becomes clear that the living situations are similar – there was no running water, insufficient ventilation, over-crowding and inadequate sanitation. When asked why a slum is an informal settlement, the learner answers that it is built of cardboards (sic). Thus it seems that the learner's understanding is not only that the living conditions are the same, but that slums in Britain *look* the same as those in South Africa, which is not true. The teacher does not make clear when the analogy holds (for the living conditions) and where it does not (that slums in eighteenth century Britain do not look the same as informal settlements in twenty-first century South Africa).

Classification of space

In terms of relations between spaces with regard to the specialization of space for teaching and learning, the space between the inside and outside of the classroom is very bounded. The teacher never leaves the classroom and learner's movement out of the

classroom is strictly monitored. However, the surrounding classrooms are often noisy. In terms of the insulation between the teacher's space and the learners' space, it is fairly bounded (C+) where the teacher and the learners generally remain in their own spaces. In terms of the subject of history, the classroom space is weakly classified as there is no indication that this is a history classroom.

8.4.3 Cognitive demand

Conceptual/cognitive demand in the lessons

To establish some description of the conceptual demand of the lesson, instructional questions asked by the teacher were counted and classified as either higher or lower order. Learner questions were counted and classified as either administrative or instructional. The tasks done by learners were also analysed using Blooms Revised taxonomy criteria.

In the four lessons of Mr Mkhize's, learners did not do any tasks during the lesson, nor did any of the learners ask any questions at all. Mr Mkhize asked a total of 93 questions, 76 (82%) were of a lower order nature and 17 (18%) were classified as higher order.

There are instances where questions that are potentially higher order questions are answered in a way that reduces their complexity.

Enthabeni 2005/1

T: Ja, the tax collectors were corrupt. What do we mean by corrupt, it means what? They were corrupt. (silence) They were corrupt. (silence). What about debts? You are not thinking. Come on, think. Why was there corruption? They were corrupt. It means what? Ja? (pointing to learner)

L: They were doing something that was illegal.

T: They were doing something that was illegal. Taking money and putting it into their pockets. What was wrong with treasury?

Here, the question ‘Why was there corruption?’ is essentially a higher order question, requiring learners to think about reasons for a particular situation. However, the question is not answered, as the teacher then asks for a simple definition of corruption, a lower order question.

The other notable thing about the teacher questioning at Enthabeni is the number of times that the teacher has to ask the question. This seems to suggest that learners don’t understand the question, or that teachers get frustrated by the lack of response and so repeat the question again and again.

Conceptual/cognitive demand in the assessment tasks

At Enthabeni in 2005, the learners had written 3 tests, 2 short homework tasks and written 5 essays. However, only one of these essays was on the history syllabus (the French Revolution). The other four were on general current affairs issues, for example ‘Discuss how South Africa’s holding of the Soccer World Cup in 2010 will benefit South Africa’ or ‘Briefly discuss the clash/dispute among ANC members based on the dismissal of Jacob Zuma, fair or unfair.’ These topics were weakly classified, as they do not show the specialised voice of history. The learners had not been exposed to any empathy or source-based questions.

An analysis of three tests written by Grade 10 learners in 2005 shows that 100% of all the marks in each test could be categorise as testing ‘Remember factual knowledge’. Learners did not do any source-based questions.

8.5 Mrs Shandu, the Grade 10 history teacher in 2006

Mrs Shandu was the Grade 10 history teacher in 2006. She did a four-year degree, a Bachelor of Humanities at the University of Swaziland, followed by a Post Graduate Certificate in Education. She studied history as a major in her degree and trained as an English and History teacher. Her own experience of learning history at school and

university was a positive one, and she says that she enjoyed studying the different periods of history. She enjoys the fact that she can give her own opinion about things that have happened in the past. She tells her students not to listen to other students who say that learning about the past is useless. 'I tell them you are the better ones, because you are the masters of English, you are going to be good in debating, you are going to be good as researchers.'

In terms of what school subject History is most similar to, she felt that the essay writing in history helps them to write a better essay in Economics, in English and even in Zulu. Science and Mathematics were the most different because 'with Maths and Science there are certain things that you really, really can't change, whereby you can't have your opinion on them.' Her purpose for teaching history is to help the learners be critical thinkers, not to take things as they are, but to challenge things, to learn to apply their opinions, to help them to read widely.

As historians, I think they become better researchers, better thinkers, people who can apply their own opinions, people who can substantiate their facts. I mean people with broad minds.

In order for a learner to be good in history Mrs Shandu feels that they need to read a lot, have a skill of enquiry and be able to read with understanding in order to answer the source-based questions and to summarise things. She feels values are key in the history classroom 'to be well behaved, to adhere to their cultures, to teach them to be better citizens, law-abiding in whatever way. There are certain things we can get from our Zulu culture and then instil in the history class'. Mrs Shandu's understanding of linking values to 'Zulu culture' is probably not what the writers of the curriculum document had in mind!

8.5.1 On the new curriculum

Mrs Shandu only attended two days of training in 2006, and still feels uncertain about the requirements of the curriculum. She notes that the content is different and the way of teaching is different.

It requires them to be more active whereas in the old curriculum most of the time it would be me. Well, I still teach in the traditional way, but it requires me to involve them a lot.

She seems to have a stronger grasp on the broad changes, but a weak understanding of the changes specific to history. She understands that there is a new focus on research, but she says learners are very poor and cannot afford to travel to the library in the nearest town. She said the heritage assignment was not discussed when she was in the training, she felt that even the facilitators were not sure about it.

Her understanding of the assessment requirements are that there are a 'lot of assessment activities to be done to help you assess if the learners have understood whatever you are talking about, whereas with the old one you would maybe go on for five days then only do the activities, or you would just give them notes and notes and notes in order to cover the syllabus'. She feels this new way is good. She has mixed feeling about the curriculum, that the preparation and the training was not enough but that the new curriculum is good because it encourages critical thinking. She feels teachers have simply been left to their own devices: 'Sometimes my decisions are not right, and I won't even know if they are right or wrong. All I have to do is to be in the classroom and teach.' Her understanding is that the new curriculum is trying to integrate history with other subjects.

8.5.2 On the learners

Mrs Shandu felt that the learners struggle to understand the English in the textbook and needed to have her translate in Zulu. 'You find that even when you are writing tests, sometimes they don't get it right because they don't know what the question requires.' This was corroborated with the learner interviews that I conducted. Only half of a group of six learners were able to understand the questions I asked in English. However she felt that the learners improved and got 'more serious' in Grade 12. She has taught the Grade 12s for a number of years and has achieved a 100% pass rate, with most learners taking it

on the standard grade. The learners who take history are in the General stream, those who ‘are running away from Science and Mathematics’.

8.5.3 Professional identity

Mrs Shandu has four years of history in her undergraduate degree and a professional teaching qualification in history and English. Her articulation of what she hopes to achieve by teaching history certainly align quite closely to the goals of the new curriculum around critical thinking. She has a clear sense of the importance of learners’ reading and developing the skills of inquiry.

8.5.4 The classroom

Mrs Shandu is teaching in the same classroom used by Mr Mkhize in 2005. The room has no identity as a history classroom; there are no posters on the walls. The space was crammed with desks, leaving little space for the teacher to move between the desks. In the first lesson which I observed, desks had been arranged in groups, but in the second lesson they desks were in rows. There is no teacher’s desk in the classroom. Sometimes Mrs Shandu puts her textbook on the desk of the learner in the front of the row.

8.6 Learning and teaching in Mrs Shandu’s classroom

8.6.1 Detailed analysis of one lesson

In this lesson (2006/1), Mrs Shandu is completing the unit of colonialism and is looking at the effects of colonialism. She begins the lesson by reading from the textbook, *History for All*. This episode is strongly framed for selection, sequencing, pacing and evaluation. Classification is very strong. In the second episode, she sets the learners a task to do in groups. The groups are large, six groups of approximately 10 learners. The task is to answer a question from the textbook: *Briefly describe the effects of colonialism*. Learners shift desks around, the noise level rises. Mrs Shandu moves around to the different

groups to monitor their work. Here the selection and sequencing are strongly framed (F++), while the pacing is weakly framed (F-) as the learners work at their own pace. Evaluation is somewhat explicit (F+) as the teacher gives some guidelines of what is expected:

You need to have ten points, and one paper per group. Take note of the word 'briefly'.

Classification remains very strong. The third episode is an administrative episode where the teacher organises the groups to come and report back. This is strongly framed.

The fourth episode is the learner report back that is weakly framed in terms of pacing. The first boy haltingly reads his notes that are copied directly from the textbook. There is no evaluation of his performance from the teacher (Evaluation F-). The next boy does the same sort of report and there is no evaluation from the teacher (F-). The third learner is a girl and in this instance the teacher does intervene in her presentation (F++).

L: Colonialism powers become rich and powerful as their empires. Colonies....

T: As their empires? They became as rich as their empires?

L: Colonialism powers become rich and powerful as their empires.

T: No. No, no. I don't agree with that one. Okay, carry on.

L: Colonise provided....

T: *Yini* (what is) colonise? *Yini* (what is) colonise?

L: Colonise.

T: Colonies.

L: Colonies provided markets for manufactured goods.

The teacher's first intervention is to question whether the colonial powers became rich and powerful as the learner said. However, she does not make it clear to the learner what the legitimate text should be, that in fact colonial powers did not become rich and powerful, nor explain *why* they did not. Her second intervention is regarding meaning. The learner clearly does not understand the difference between the verb 'colonise' and the noun 'colonies'. The teacher's intervention does result in the learner using the correct word, but one wonders if it has in fact lead to better understanding of the words.

Two issues seem to emerge here. The first is that the presence of the teacher's evaluative rule is arbitrary. It is not clear why she makes no comment on the two previous learners'

presentations, but does comment on the third learner's presentation. The second issue is a question about the usefulness of the teachers' intervention. Does the girl really learn anything about what is expected about her performance, or in other words, the realization rules? This points to the *quality* of the strong evaluation rule and not simply the existence of an evaluation rule.

In all the tasks, the classification is strong – there is no mention by learners or teacher of any topic other than colonialisation.

8.6.2 A description of pedagogic discourse

This general description draws on the range of five lessons observed in 2006 and not only Lesson 1, as detailed above.

Hierarchical rule

In terms of disciplining learners, the hierarchical rule teacher – learner is positional or imperative (F++) where the teacher becomes angry and threatens the learners. In one instance she sends two boys out of the class saying

Velani ngala niphumile. Velani sheshani. Nizobuya ngemuva kwe-period. Angithi niyazi uba anishaywa, kungcono nishaywe umoya. Move out quickly, you know I cannot hit you, let the air hit you, come back at the end of the lesson. (E2006/4)

The hierarchical rule learner – learner is strongly regulated by the teacher who always assigns learners to particular seats or groups (F++).

Framing

The sequencing and selection is strongly framed. Learners have a little control over pacing (F+) when there is a learner task and the teacher also accepts learner interventions and comments. The evaluative rule is F+ where the evaluative rules are quite clear and the teacher often are required to give reasons for their answers. However, the quality and

usefulness of the evaluative rule is not always clear. The evaluative rule appears to be applied arbitrarily.

Classification

There is no mention of any other subjects or any other topics in history during the lesson. Mrs Shandu does bring in everyday knowledge occasionally and sometimes does so to make a moral point. For example, during a discussion on slavery she says that some people are also slaves to their own bad behaviour such as smoking dagga behind the toilets. Some minutes later she gives the example of young girls who are 'sold' into marriage to much older men. She clearly disagrees with this practice calling it a disgrace. So she uses the topic of slavery to make her opinion on certain issues clear, but these examples do not do much to deepen learners' historical understanding of slavery.

Classification of space

In terms of relations between spaces with regard to the specialization of space for teaching and learning, the space between the inside and outside of the classroom is very bounded. The teacher never leaves the classroom and learner's movement out of the classroom is strictly monitored. On two occasions during the five lessons observed, Mrs Shandu asks learners to leave the classroom as a punishment for unruly behaviour. The surrounding classrooms are often very noisy. Occasionally, the level of noise disrupts the learning in the history classroom. In terms of the insulation between the teacher's space and the learners' space, it is quite unbounded (C-) where the teacher often enters the learners' spaces to monitor what they are doing. There is no teacher's desk in the classroom, so if the teacher sits down or places her textbook on a desk, she does so on a spare learners' desk.

8.6.3 Conceptual/ cognitive demand

Conceptual/ cognitive demand in the lessons

Mrs Shandu asked a total of 64 questions during the 5 lessons which were observed. Of these, 49 (77%) were lower order questions, and 15 (23%) were higher order questions. There was only one question from a learner during the five observed lessons, and this was of an administrative nature.

As does Mr Mkhize, Mrs Shandu asks the same question over and over again, and often ends up answering her own questions. This seems to stem from the lack of willingness or ability of the learners to answer the questions. The following is an extract from the third lesson I observed.

When we talk of slavery, what exactly are we talking about? What is a slave? What is really involved to be a slave, when you were working as a slave, what was expected of you? What were the conditions under which slaves worked? What exactly are they saying about slavery? As a slave you don't get paid, as a slave you work for others against your will, as a slave you find yourself forced to slavery. What else? What else? *Niqhubeke ninghitshela*. Carry on tell me. What else?

During the five lessons, learners were required to do two activities. The first task was to be done in a group. The instructions were to 'Briefly discuss the effects of colonialism'. One learner from each group reported back on the discussion. The answers expected from this task were to list the reasons found in the textbook *History for All* (Brink, Gibbs, Thotse, & Verner, 2005) (See Appendix M for an excerpt from this textbook which was used in this lesson). Thus the task is categorised as Recognise Factual Knowledge (A1).

The second task is taken from the textbook page 100: write a diary entry describing a day in the life of a slave. This is an individual task. It is categorised as Understand Conceptual Knowledge (B2) as learners are required to do more than recognise facts from a text, but need a conceptual understanding of the conditions that slaves worked under. It also requires empathy skills to put themselves in the shoes of a slave.

Conceptual/ cognitive demand in the assessment tasks

I was only able to collect two tests from Enthabeni in 2006. Neither of these were based on the new format required by the new curriculum, which is a key question, a few source-based questions and an extended piece of writing. The first test was a set of questions based on an excerpt from *History for all* (p 9 –10) on Mwanamutapa. Learners were simply required to copy out the correct chunks of the text for each question, thus 100% of the marks were awarded for Recognise Factual Knowledge (A1). The second test on the Colonies did require more than only recognising factual knowledge, as 40% of the marks were categorised as Understand Conceptual Knowledge. The teacher used the exemplar provided by the DoE for the November examination and this format would have been unfamiliar to the learners, as it does not appear that they wrote source-based tests during the year.

Figure 20: Detailed analysis of a lesson taught by Mrs Shandu: Enthabeni

Epi- sode	Duration Mins Secs %	Kind of activity	Description	Framing					Classification			
				Selec- tion	Sequenc ing	Pac- ing	Evalua- tion	Inter- disciplinar	Intra- disciplinary	Inter- discursiv		
1. 00.00	25.12	Content based teacher talk	Teacher is teaching on the effects of colonialism from the textbook.	F++	F++	F++	F++	C++	C++	C++		
2. 25.12	18.43	Group work	The task is to describe the effects of colonialism	F++	F++	F-	F+	C++	C++	C++		
3. 43.55	2.20	Administration	Organising the report backs	F++	F++	F++	F++	-	-	-		
4. 46.15	8.10	Learner report back	Three learners report back.	F++	F+	F-	F+	C++	C++	C++		
5. 54.25	0.40	Administrative		F++	F++	F++	F++	-	-	-		
END 55.05												

8.7 Lincoln High School

Lincoln High is a school that used to be under the auspices of the House of Assembly and is located in a middle class, mostly white suburb in Pietermaritzburg. The staff is still mostly white, although the student body is racially diverse. The school is highly sought after by parents and receives approximately 600 applicants for Grade 8 each year. Applications close by March of the previous year. Every applicant is interviewed and approximately 200 learners are accepted into the school. According to a teacher at the school, Lincoln is one of the four 'top' government schools in Pietermaritzburg. The matric pass rate has been 100% for a number of years.

The fees were R 7 800 per annum in 2006. The school has 1200 learners with a total staff complement of 48 teachers. Of these, the School Governing Body pays twelve. The school is well resourced, with a large administrative block which consists of an office for the principal and deputy principal, a large receptionist's office, photocopy room, large staff room, meeting rooms, a marking room (with 10 computers), offices for Heads of Departments and store rooms. The entrance into the school is via a spacious lobby, which has armchairs for visitors to wait in, a water feature, the school song printed on a plaque and photographs of various top-achieving learners on the walls. The lobby leads into the school hall on the one side, and to the secretary's and reception offices on the other.

Teachers have their own classrooms, and learners move between lessons to the teacher. There is a media centre, a team teaching room, a computer room, an art room, a drama room as well as laboratories for science and biology.

The school offers a large variety of extra-mural sports and activities to its learners, from badminton, water polo, rock climbing, canoeing to the more usual sports such as tennis, rugby and soccer. Other activities include chess, drama, choir, a service club, catering and a music club (for playing musical instruments).

8.8 Mrs Lawrence, the Grade 10 history teacher

Mrs Lawrence has been teaching at Lincoln for 18 years, first as an English teacher and then as a History teacher. She says that in her first year of teaching, the principal ‘twisted her arm’ to take on a vacant history post, teaching the junior classes, which she thoroughly enjoyed. For many years she had an equal load of English and History, but now only teaches History to Grade 9, 10 and 12. She is the History Head of Department, and the head of Grade 12. She has a Bachelor of Arts and a Higher Diploma of Education. She trained to be an English and Guidance teacher rather than a history teacher. She did one year of History in her BA.

She hated history at school because which consisted of taking turns reading and summarizing the textbook, and was determined not to teach in the same way. The thing that she enjoys most about teaching history is the discussion and debates, and

seeing quite narrow-minded kids growing and becoming more open-minded ... seeing them engaging and growing. I think it teaches, preaches, if not teaches, tolerance and respect and also problem solving. ... we inculcate those philosophies and they just become well-rounded people... they come out of history with factual knowledge and with a different attitude life...

For Mrs Lawrence, History is most similar to English at school because of essay writing and in trying to inculcate a sense of empathy that is done in literature and History. She believes that learners who are good at history are naturally eloquent and can argue with conviction, and that those who have a passion and interest in current affairs are at an advantage.

8.8.1 Professional identity

Although she did not train specifically as a history teacher, Mrs Lawrence has a strong identity as a history teacher. She reads widely in order to broaden her history knowledge. Her tertiary background in English literature comes through clearly in her teaching, as she often draws on novels to illustrate various issues (for example, *1984* when talking about dictatorships, *Hard Times* to illustrate education in Victorian Britain etc.) She sees

her classroom as a place to extend learners' views of the world, to help them to see things differently and to think more critically. She spends a lot of the lesson time creating a narrative, explaining key concepts and making links between new knowledge and other concepts that have been covered.

8.9 Learning and teaching in Mrs Lawrence's class

There are two Grade 10 history classes at Lincoln. 2005 is the first year that there have been enough learners choosing history in Grade 10 to warrant two classes. Mrs Lawrence said that she and her colleague had worked hard to popularize the subject and was worried that this may be wasted when the new FET subject lines are introduced in 2006. The other history teacher was not interested in being involved in the study, so it was clear that I would observe Mrs Lawrence's class.

The classes are streamed and in 2005 Mrs Lawrence taught the 'brighter' class. Only five of the 21 learners were boys, and only one was black. This was unusual, since in the Gr 12 and Gr 9 classes that I observed, the split between gender and race was more even. In 2006, she taught the lower class, which comprised more boys than girls.

8.9.1 A detailed analysis of one lesson

I have chosen this lesson (L2005/2) as an exemplar as it shows a range of different episodes – learners reporting back from a group work task, the teacher responding and then an open discussion. This is not necessarily a 'typical' lesson that would be representative of all the ten lessons I observed.

In the previous lesson (Lesson 1), Mrs Lawrence had handed out notes on capitalism, socialism and communism. She divided the class into three groups (of about 8 learners each) and allocated each group an economic ideology. She asked them to construct a PMI (pluses, minuses and interesting) table. Learners needed to use the notes to write down the advantages, the disadvantages and the interesting points for their topic. They had done

PMI tables before, and Mrs Lawrence also modelled how to do one, using the Industrial Revolution as a theme. Groups were given 15 minutes to complete the task. In this lesson (Lesson 2), learners are reporting back to the whole class.

In episode 1, the teacher is organizing the reporting back process. It is characterized by the teacher being in control, hence strongly framed in terms of selection, sequencing and pacing. There is no classification coding. In the second episode, three learners report back on the discussions that they had in their groups. Although the selection of the content is strongly framed (that is, controlled by the teacher), the sequencing and pacing is controlled by the learner doing the report back, hence weakly framed (F-). The evaluative criteria are strong, in that the teacher makes some comments on the learner's report-back, ensuring they are on the right track.

For example, after a learner has explained the philosophy of capitalism, Mrs Lawrence signals what is missing from the learner's production:

You have given the philosophy now, which is good...but just to add to that – private ownership of wealth in a nutshell. (F++, evaluative criteria)

In episode 3, the teacher takes control of the sequencing and selection again, wanting to get a sense of which learners have really understood the concepts. Pacing is weakened a little, as the teacher accepts some learner interventions and questions. Evaluation is strong, where the teacher makes the evaluative rules explicit. Classification is strong – the episode focuses solely on history knowledge and on the topic under discussion.

Episode 4 becomes more weakly framed, as three learners take the discussion in a particular direction. Learners have greater control over the selection, sequencing and pacing. The teacher does not make the evaluative criteria explicit. Classification is also weakened, both at the inter-disciplinary, intra-disciplinary and inter-discursive levels.

The episode begins with a learner asking: 'Do you think there are any countries that don't use any of these?' [economic systems]. This question starts a discussion on globalization, materialism, consumerism and the absence of self-sufficiency in our society today. Mrs

Lawrence allows the discussion to continue for just more than 15 minutes (32% of the entire lesson). It is weakly framed in terms of selection, sequencing, pacing and evaluation as a few learners lead the discussion. As the bell rings, Mrs Lawrence expresses her concern that the learners are still slightly confused and says ‘So shall we do that tomorrow, shortly cover those philosophies again?’

The first three episodes are strongly classified, with an undiluted focus on history content, until the final episode, which is a general discussion, led by three learners. Here the discussion is wide ranging, and thus more weakly classified.

Figure 21: Detailed analysis of a lesson taught by Mrs Lawrence: Lincoln High (2005/2)

Lincoln 2005/ 2 (2 Aug 2005)												
Topic: Learners report back on Economic ideologies												
Epi- sode	Duration Mins Secs %	Kind of activity	Description	Framing					Classification			
				Sele- ction	Sequenc ing	Pac- ing	Evalu- ation	Inter- disciplinar	Intra- disciplinary	Inter- discursiv		
1. 34.34	2.48 (168) (5.7%)	Administrati ve	Organising the learner report backs, sends a child to the secretary's office to fetch something.	-	-	-	-	-	-	-	-	-
2 36.55	29.06 (1746) (59.6%)	Learner report back	Individual learner or a group of learners reports back on their group task	F++	F-	F-	F++	C++	C++	C++	C++	C++
3. 01.05.5 9	2.53 173 (5.9%)	Whole class interactive	Teacher summarises the key learning concepts that learners should have grasped through their task. She asks questions to check if learners have understood.	F++	F++	F+	F++	C++	C++	C++	C++	C++
4. 01.08.5 2	15.37 937 (32%)	Substantive dialogical interactions	T engages in sustained interaction with one or more learners. Four learners and teacher enter into a discussion on alternative economic systems the 'tyranny' of technology, sustainable living etc.	F-	F-	F-	F-	C++	C-	C-	C-	C-
END 01.22.1 5	48.45 2925 100%											

8.9.2 A description of pedagogic discourse

Here I draw on the analyses of all ten lessons to create a general picture of pedagogic discourse in Mrs Lawrence's classroom.

Hierarchical rule

In terms of the hierarchical rule (the extent to which the teacher and learner have control over the order, character and manner of learners' conduct), Mrs Lawrence seldom admonishes learners, as she has very little need to. She takes implicit control through the pacing of the lesson, for example. She also allows learner-led discussion, where classification is weakened, and discussion becomes informal. She uses a personal form of control (F-). Learners generally seem to have an awareness of what is expected of them in the regulative discourse (that they need to listen to other learners, that there is space to enter into discussion with the teacher and the other learners).

The hierarchical rule learner – learner is mostly regulated by the teacher, where learners sit in seats or groups which have been negotiated between teacher and learners (F+). For example, when assigning groups for the group activity the teacher says

Okay, you will probably be in groups pretty much as you are sitting, this group is too big and this one is a little small. Can someone here volunteer to join the group on my left? (no movement) Can someone please also join the group on my right and will the two of you join the group on my left?

Learners at Lincoln were often self-regulating (F-). Mrs Lawrence creates a fairly informal atmosphere where learners were allowed space to ask questions and make comments. Discipline was mostly personal (F--). Learners and the teacher shared jokes. For example, in one lesson (L2006/3) the learners say that they want to watch a movie, and Mrs Lawrence responds:

T: Guys, if there's a movie on anything, you're happy. There's a lovely movie about...

Ls: Jack the Ripper...

T:...about Chartism. I'll bring it and show it to you (*disappointed sounds from learners*). It's three hours long and in black and white. (*Learners laugh*).

Framing rules

There was generally strong framing for the selection, sequencing and pacing rules. In 2005, there was slightly weaker framing regarding selection and pacing, as there were four or five learners who often asked questions and had discussions that were more controlled by the learners than by Mrs Lawrence. This did not happen in 2006 and selection, sequencing and pacing were strong. Mrs Lawrence showed very strong framing of the evaluative rule when it comes to the kinds of verbal answers required of learners. Her learners are almost always required to give a reason for their answer; she will often elaborate on an answer and will always say if an answer is incorrect. The one time the evaluative rule was weakened considerably was when learners acted out their role-plays for the class and there was no evaluation from the teacher at all (L2006/5). She simply says ‘thank you’ and the next group starts. Might this be because she doesn’t see this activity as ‘real’ history and thus is not worthy of evaluation?

Classification

Classification is generally strong (C+). Mrs Lawrence particularly makes links across disciplines and within the topics of history, and less so with everyday knowledge. She makes mention of a number of English literature books – she reads from Dickens’ *Hard Times* as a illustration of education in Victorian Britain, and makes reference to *Animal Farm, 1984* and *Walkabout* at various other points.

Mrs Lawrence actively encourages learners to see the links across the various topics. This is seen clearly in the essay topic ‘The past is prologue’, which requires learners to make explicit how the Industrial Revolution was a precursor to a number of other important historical events.

A little earlier, I mentioned that World War I wouldn’t have taken place, if the development of communism arose from the industrial revolution; so much of our contemporary history goes back to the industrial revolution. Hitler would not have held sway in Europe if there had not been an industrial revolution. (L2005/3)

Another example in a class discussion on the rise of the working class in industrialising Britain and how the Luddites were sabotaging factories, she asks learners to think of a similar situation in South Africa where people used acts of sabotage because they did not have power. She wants them to think of the armed struggle and there is a discussion about this. She then asks for an example from the French Revolution.

It's very open-ended whether it's the wrong or right thing to do, but very often it's a pattern in history that people do take the law into their own hands and they do commit acts of violence. Give me a very good example from the French Revolution which we studied earlier this year. (L2006/1)

A learner offers the Storming of the Bastille as an example, and another learner says 'What about that Boston thing?' Mrs Lawrence accepts the Boston Tea Party as a further good example and then asks for 'an example from slavery, where sabotage was used as a means of trying to achieve your ends.'

Classification of space

The history classroom at Lincoln is very large, with the desks only taking up the front half of the space. The desks are arranged in rows. In some rows there are two desks adjoining each other. The walls displayed learners' work (such as posters for imagined South African political parties), and history cartoons. There is also a storeroom attached to the classroom because Mrs Lawrence is the HoD for History.

In terms of relations between spaces with regard to the specialization of space for teaching and learning, the space between the inside and outside of the classroom is very bounded. The teacher never leaves the classroom and learner's movement out of the classroom is strictly monitored. During lesson time, the surrounding classrooms are quiet. In terms of the insulation between the teacher's space and the learners' space, it is quite unbounded (C-) where the teacher often enters the learners' space to monitor what they are doing. At the disciplinary level, the space classification is very strong. The posters on the wall and display of learner work indicate that this is clearly a history classroom and there is a storeroom for storing textbooks and learner portfolios etc.

8.9.3 Conceptual/ cognitive demand

Conceptual/ cognitive demand in the lessons

Altogether during the ten lessons observed, learners had to do four class activities. One of the tasks that Lincoln learners did was to categorise information into the Pluses, Minuses and Interesting issues of a particular economic ideology. I would place this in the Understand Conceptual Knowledge category (B2). Learners had to write a one-page individual response to the quote ‘The past is prologue’ with respect to the Industrial Revolution as a homework task. I would categorise this as Analysing Conceptual Knowledge (B4).

In 2006, learners had to assess three different paragraphs written in response to the question ‘Did the lives of ordinary working people really improve? Learners are given a list of criteria to use to assess the paragraphs (see Appendix M6). This was categorised as Evaluate Conceptual Knowledge (B5) as they were applying a set of criteria to a piece of writing. This task also served to make explicit to learners how the criteria would be applied by the teacher in their own writing.

In another activity, they had to host a ‘talk show’ on the topic of child labour. One learner is the talk show host, one a govt official, one a unionist, one a child labourer and one a factory owner. This task was categorised as Understand Conceptual Knowledge (B2). What was interesting about this task was the evaluative rule was very weak, the teacher made no attempt to evaluate the performance of the learners as they played back their role-play to the class. This was an exception to the usually strong evaluative rule.

Mrs Lawrence would often urge learners to find one concept that encompassed a number of facts. In the following example, learners are listing the ‘minuses’ or disadvantages of the Industrial Revolution.

T: Okay put it all together, the murdering, the prostitution, the deficiencies, into one broad label.

L: Evil. (teacher smiles)

L: loss of morals.

T: Thank you, brilliant, so if we want to label that ‘Loss of a lot of morals’, what about calling it moral decay? Like tooth decay. Moral standards start to slip.

In reviewing a test on the Industrial Revolution (L2006/4) Mrs Lawrence spends some time on the importance of using euphemisms to describe the sanitary conditions in tenements such as human waste, sewage, faeces. The use of correct terminology is important.

Thus the cognitive demands of the in-class activities all required the use of conceptual knowledge and learners were required to work at a range of cognitive levels including analysing and evaluating.

The following table shows the number and the level of questions asked by Mrs Lawrence in 2005 and 2006.

Table 12: Level of questions asked by Mrs Lawrence

	Lower order	Higher order	Total
2005 (5 lessons)	31 (40%)	46 (60%)	71 (100%)
2006 (5 lessons)	108 (70%)	46 (30%)	154 (100%)

In 2005, the incidence of higher order questions is higher than in 2006. In the 2005 class the teacher asks 60% higher order and 40% lower order questions, whereas in 2006 it is 30% and 70% respectively. A reason for the difference may be that the 2005 class was the ‘top’ class. It appears that it is easier for teachers to ask higher order questions when the learners are willing and able to answer such questions. It is this same class (Lincoln 2005) that the learners ask a significant number of questions (see Table below).

Table 13: Number of questions asked by learners at Lincoln

School: Lincoln	Administrative	Instructional	Total
2005 (5 lessons)	11 (25%)	32 (75%)	43 (100%)
2006 (5 lessons)	8 (26%)	23 (74%)	31 (100%)

Learners at Lincoln obviously feel comfortable asking questions in the classroom. In both years of fieldwork, learners asked a number of questions and these were significantly more instructional questions than administrative.

The same five learners asked most of the questions asked by learners at Lincoln in 2005. Lincoln was the only classroom where I saw learners entering into dialogue together during an episode that was not a teacher-designated group work task. For example, Simon has just completed his group's report back on capitalism. A girl from the class makes this comment:

- Learner 1: Would it be a good thing to have a variety of goods all the time and a variety of jobs and stuff because in the end it will make you fall down, because people will get too greedy, and too...ja.
- Learner 2: That's basically what we said.
- Learner 1: So it doesn't matter what, socialism, communism (unclear)...
- Learner 2: Everyone is full of greed. You can't say that capitalism creates more greed than communism. Communism will encourage more greed than capitalism, everyone is equal and you want more because you can't have what you want.

Cognitive demand in the assessment

Lincoln learners in 2005 had been assessed through a wide range of tasks. They had written a 10 page investigative report entitled 'Who killed Jack the Ripper?', three essays, five tests (which included source-based questions and empathy questions) and 3 short homework tasks which required writing in a different kind of genre (for example, write a letter as soldier who has deserted Napoleon's Russian Campaign, or write a newspaper article about the death of Louis XVI).

Assessment changed in 2006. The new curriculum replaces the traditional history essay with a piece of extended writing and has a strong focus on source-based questions. Lincoln was ‘compliant’ with the demands of the new curriculum and the tests designed at these schools were designed using the assessment guidelines given by the Department of Education (2007).³²

In terms of an analysis of test questions, using Bloom’s Revised taxonomy, Lincoln tests showed a good spread of marks across both the cognitive process and the knowledge dimension. Mrs Lawrence allocated a substantial number of marks to questions that required learners to analyse or evaluate the source material. In 2006, there was less of a spread of questions across the conceptual and knowledge dimensions than there was in 2005. In 2005, there were no test questions categorised as Remember Factual Knowledge, while in 2006, 36% of questions were in this category. Thus it appears that the requirements of the new curriculum resulted in more test questions with a lower cognitive demand.

8.10 North Hill Secondary school

North Hill is a school that used to be under the auspices of the House of Delegates, and catered exclusively for Indian students. It is located in a suburb that was intended for Indians under apartheid planning. The majority of the staff is Indian, but the learner body is now approximately 80% black African and 20% Indian. The school actively recruits learners, by visiting local primary schools to promote the school. Applications for Grade 8 stay open until the end of January to ensure that the intake is sufficient (280 learners), so that the school will not lose any staff.³³ Thus the school accepts all the learners that apply. The matric pass rate has been between 98% and 100% over the past three years.

³² Tests must be framed by one of the key curriculum questions (for example “How did the Industrial Revolution affect the working class in Britain?”). The tests consist of three or four sources with a number of short questions (usually worth 30 marks), followed by a piece of extended writing worth 20 marks.

³³ Every year the Department of Education counts the numbers of learners enrolled in a school, and allocates a certain number of teachers to that school according to the Post Provisioning Norm. If a school has a drop in enrolments, it stands to lose some teachers.

Approximately 30% of the learners live near to the school, with 70% living further a field. Approximately 100 learners travel from Hammarsdale, a township some 40kms away. A learner said that she comes here because it is a good school, there are no disruptions, and the teachers come everyday, unlike some schools in Hammarsdale. The trip would take learners approximately 45 minutes by taxi into Pietermaritzburg, and another 30-minute taxi- ride to the school. Approximately 200 learners come from the Eastern Cape and live in privately-run hostels in the town of Pietermaritzburg during term time.

The fees were R 900 per annum in 2006 (including a R 200 fee for stationery). The school has 1125 learners and a total of 39 teachers, of which seven have salaries paid by the School Governing Body. There is a large drop out rate between Grade 8 and Grade 12, hence class size in Grade 8 is approximately 45 learners, while in Grade 12, the class size is approximately 30 learners. According to the principal, amongst parents there are few professionals (except most of the Eastern Cape children have parents who are teachers), many are unemployed and most would be working in shoe factories, as supermarket workers etc.

The school has an administrative block with offices for the principal, deputy principal, HoDs and secretary. There is also a storeroom and a photocopy room. Visitors wait in the courtyard, on a bench under a shelter. There is no hall. Assembly takes place on the basketball courts. There are science and biology laboratories, a team teaching room, a media centre and a computer room for learners. The classrooms were clearly built for classes of less than 40 learners, as the desks take up all available floor space. In 2005, teachers moved from class to class for teaching, rather than the learners moving. This was changed in 2006, where the learners now move to a specific teacher's classroom.

The sports facilities consist of one playing field, two cricket nets and a netball/ volleyball court. The school offers soccer, athletics, volleyball and swimming (although there is no swimming pool on the school grounds), chess and choir.

The principal believes that the greatest challenge facing the school is ‘getting enough learners to keep the school from dying – we must keep the current enrolment to retain teachers’ posts’. It is interesting that he frames the challenge from within his own perspective and that of his teachers, rather than from the perspective of the learners. This is contrast to Enthabeni, where the biggest challenge is seen as the poverty in the community. It is telling in that the learners at North Hill do not in fact come from the geographical community in which the school is located, and from where its teachers are drawn.

8.11 Mrs Naidoo, the Grade 10 history teacher

Mrs Naidoo has been teaching at North Hill for four years and before that, taught at a senior primary school for 4 years. She trained to be a senior primary school teacher through a local distance education institution. She also did a Further Education Diploma in Management and completed a B.Ed. Hons part time at the end of 2005. She did not study history in her diploma, nor did she take it as a matric subject. She started by teaching Human and Social Sciences at North Hill and then moved onto to teach Grade 10, which she has taught for three years.

She enjoys teaching history because ‘you are able to relate it to the present day, and local history, you are able to teach why these things have taken place.’ She feels that the most important thing for learners to know is how things have changed over time and how they are now. Understanding how things were helps them to understand what is going on now. It is important to her to relate the curriculum to the learners’ interests and she finds that her learners find South African history more interesting, particularly a topic like Shaka Zulu. She feels that history is most closely related to the school subject of English because ‘if you have the English foundations, you will be able to write beautiful essays and interpret, analyze cartoons and sources very easily, because you have the foundation of the language that you can use.’

A number of times after a lesson I had observed, Mrs Naidoo would comment on the ‘quality’ of the learners. She feels they are not able to cope with the demands of history, that they do not participate in lessons and do not do their homework. She says many of the learners do not have anyone at home to motivate them to do their homework.

8.12 Learning and teaching in Mrs Naidoo’s classroom

Four of the eight Grade 10 classes take history. These are the learners who do not take maths. The classes are not streamed according to ability, but learners are grouped according to their subject packages. The main criteria that Mrs Naidoo had about which class I should track in 2005, was whether they were likely to have a high rate of absenteeism during the week of observation. I was there in the week following the termly tests, which was also the second to last week of the third term. Mrs Naidoo said the learners know that the tests are over, so many tend not to come to school. She suggested that I track Grade 10 C, which had 31 learners. On the Friday of the week I was there, the history lesson did not take place, as only three learners were present. In 2006, I observed 10D that had 38 registered learners. The numbers that attended ranged between 32 and 36 but this was much lower for the Friday lesson.

8.12.1 A detailed analysis of a lesson

In this lesson (2005/3), Mrs Naidoo is revising work on the Industrial Revolution. In Episode 1 the activity is teacher-led question and answer. The learners are given a worksheet with five pictures on it. The pictures are labeled as follows: ‘Spinning and lace making at home’, ‘Spinning machine’, ‘Weaver at home’, ‘Spinning a in a factory’ and ‘Cloth hall market’. The learner task is to answer the question: ‘what do you understand by the domestic system and what do you understand by the industrial system?’ This episode is strongly framed for selection, sequencing and pacing. Evaluation is categorized as F+, as she sometimes asks learners to elaborate or modify their answers. For example:

L: We understand that they are doing work.

T: Okay, so they are doing work. What kind of work? (*Teacher asks for an elaboration on the learners response F+*)

Episode 2 is a short learner task, where in pairs learners have to decide whether each source falls under the domestic or the industrial system. The teacher controls the selection and sequencing, but the pacing here is F+, as the learners have a little bit of leeway in terms of the pacing of the task. The next three episodes are characterized again by strong teacher control over sequencing, selection and pacing, and F+ for evaluation. In these three episodes the teacher gets feedback on the worksheet task, reviews the question “What is the Industrial Revolution?” and reads from a second page of the worksheet on they the Industrial Revolution began in Britain. The final episode of the lesson is an individual activity, where learners have to write down four reasons that the Industrial Revolution began in Britain. Here learners have control over the pacing of the task, and the evaluation is strongly framed. The teacher makes the evaluation criteria very explicit (F++). She says:

I'd like you now to write about four lines on each of these, using your resources. Write it in your own words so that you understand why the Industrial Revolution began in Britain. So you can use the notes, but don't write it down as is, because now you have understood why the Industrial Revolution began in Britain. So using your notes, you write down four reasons why the Industrial Revolution began in Britain.

In all the activities, the classification is strong – there is no mention by learners or teacher of any topic other than the Industrial Revolution, no linking to any other topics in history and no connection with everyday knowledge.

Figure 22: Detailed analysis of a lesson taught by Mrs Naidoo: North Hill

	Duration Mins Secs %	Kind of activity	Description	Framing					Classification		
				Selec- tion	Sequenc- ing	Pac- ing	Evalua- tion	Inter- disciplinar	Intra- disciplin- ary	Inter-discursiv	
1. 00.00	05.17 317 13.7%	Teacher-led question and answer	Teacher asks questions about a worksheet with domestic and industrial pictures on it.	F++	F++	F++	F+	C++	C++	C++	
2. 05.17	2.15 135 5.8%	Pair activity	Learners to discuss worksheet in pairs.	F++	F++	F+	F++	C++	C++	C++	
3. 07.32	5.33 333 14.3%	Teacher-led question and answer	Teacher gets feedback on the worksheet task.	F++	F++	F++	F+	C++	C++	C++	
4. 13.05	4.16 256 11%	Teacher-led question and answer	Reviews 'what is the Ind Rev?', getting learners' input.	F++	F++	F++	F+	C++	C++	C++	
5. 17.21	9.41 581 25%	Content based teacher talk/ explanation	Reads from the worksheet "Why did the Ind Rev begin in Britain?, interspersed with questions for the learners.	F++	F++	F++	F+	C++	C++	C++	
6. 27.02	11.33 693 29.9%	Individual activity	Learners to write down four reasons that the Ind Rev began in Britain. Teacher moves around the class explaining the task to some learners.	F++	F++	F-	F++	C++	C++	C++	
END 38.35	2315										

8.12.2 A description of pedagogic discourse

Here I draw on the analysis of all ten lessons to create a general picture of pedagogic discourse in Mrs Naidoo's classroom.

Hierarchical rule

In terms of disciplining learners, the hierarchical rule teacher – learner would be personal or positional as the teacher listens to learners' reasons for their actions and reproves them based on personal or positional control. Mrs Naidoo gives reasons for her requests, for example when the class is getting too noisy, she says:

If you want to answer, put up your hand to answer. Now you are all making a noise and you are not allowing other people to talk. If you don't allow other people to talk then you won't listen and you won't understand this section.
Thank you.

Mrs Naidoo takes care to listen to all the learners when they contribute to the lesson. When a learner comes late saying she is feeling ill, Mrs Naidoo asks after her health.

The hierarchical rule learner – learner is strongly regulated by the teacher who often assigns learners to particular seats or groups (F++).

Framing rules

In terms of sequencing and selection rules, Mrs Naidoo was strongly in control (F++). With regard to pacing, this was slightly weakened when learners were working in groups, and when the groups were reporting back. Although the teacher was generally in control of pacing, there was also a sense that coverage of material was fairly slow. For example in the five lessons observed in 2005, two lessons were spent reviewing a test on apartheid, one lesson on revision on the industrial revolution, one lesson recapped the revision lesson, and the fifth lesson entailed a group work task and a report back on inventions of the Industrial Revolution.

The evaluative rule was generally strong for in class discussions, as learners are often required to give reasons for their answers. The evaluative rules for the recognition

rules were generally made explicit. For example when explaining what was required in a particular task, she moves around to the different groups and ensures they are clear what they need to do. However, the evaluative rule for the realisation rules was often weakly framed. When learners did a report back, Mrs Naidoo would give sometimes ask for elaboration but often allow answers to go without any comment.

Classification

There was very strong classification at inter-disciplinary, intra-disciplinary and inter-discursive levels. Mrs Naidoo seldom related what being taught to any other school subject, any other topic or any everyday knowledge. There is one instance of a learner inserting a personal reflection on apartheid, but she does not entertain this comment and moves on with the topic of the ‘five pillars of apartheid’.

T: Is the separate amenities still in existence today?

Chorus: No

T: No. Tell us why.

L: It was repressed.

T: Yes, the act was... (pause) what is the word?

L: Abolished.

L: We fought for our rights. (Teacher ignores the learner’s comments)

T: The fourth pillar of apartheid?

Classification of space

In 2005, the history classroom was a generic classroom used to teach a range of subjects, so there was nothing in it that signalled it was a history classroom. Teachers moved from classroom to classroom, while learners stayed in one classroom. In 2006, Mrs Naidoo used the classroom for all her history teaching. In terms of relations between spaces with regard to the specialization of space for teaching and learning, the space between the inside and outside of the classroom is very bounded. The teacher never leaves the classroom and learner’s movement out of the classroom is strictly monitored. However, learners do sometimes come late to the lessons. The surrounding classrooms are often very noisy. Occasionally, the level of noise disrupts the learning in the history classroom. In terms of the insulation between the teacher’s space and the learners’ space, it is quite unbounded (C-) where the teacher often enters the learners’ spaces to monitor what they are doing.

8.12.3 Conceptual / cognitive demand

Conceptual/ cognitive demand in the lessons

The North Hill learners did a number in class activities that are tabulated below. The majority of these require learners to recognise factual knowledge and two require an understanding of conceptual knowledge. The following table describes these activities.

Table 14: Class activities done by North Hill learners

Year	Description of class activity	Grouping	Cognitive demand
2005	1. Do five different pictures represent the domestic or the industrial system? Pictures are labelled 'Spinning and lace making at home', 'Spinning machine', Weaver at home', Spinning a in a factory' and "Cloth hall market'.	Pair	Remember Factual Knowledge (A1)
	2. Using notes supplied, write down four reasons that the Industrial Revolution began in Britain.		Remember Factual Knowledge (A1)
	3. Answering questions from information photocopied from a textbook.		Remember Factual Knowledge (A1)
2006	1. Making a poster and presenting information from the notes given to the class on either the social, political or economic causes of the French Revolution.	Group	Understand Factual Knowledge (A2)
	2. Answering questions on the income and expenditure statement of Louis XVI.	Individual	Remember Factual Knowledge (A1)
	3. Imagine you are a peasant in France. Write a letter to a friend in another country and explaining to him/her why you are so unhappy.	Individual	Understand Conceptual Knowledge (B2)
	4. Answering questions on a cartoon.	Individual	Remember Factual Knowledge (A1)
	5. A diary entry explaining the burdens that are placed on you as a peasant by the privileged classes.	Individual	Understand Conceptual Knowledge (B2)

The group tasks at North Hill were of a low level conceptual demand. For example, learners were given a worksheet with five pictures on it, and needed to decide for each picture if it showed industrial work or domestic work. I would categorise this as Remember Factual Knowledge (A1), because the pictures were already labelled quite clearly.

The activity on the inventions in the Industrial Revolution was essentially a matter of answering comprehension questions from a textbook:

Railway Locomotion- George Stephenson

1. Discuss the changes that took place with regard to locomotion and rail routes in Britain.

2. How did this play an important role in the Industrial Revolution?

Only one question required more cognitive demand than simply finding the answer in the text. This question was ‘Was Richard Arkwright a capitalist?’ Overall the task is categorised as Remember Factual Knowledge (A1). Observing learners attempting these questions in their groups gave some indication that many learners struggle to find information from a written text. Hearing learners report back to the whole class made it clear that the preferred strategy was to copy out large chunks of the text verbatim, and hope that at least part of what was copied would answer the question. Mrs Naidoo did not seem concerned that learners’ answers were copied directly from the text given.

Mrs Naidoo asked a number of instructional questions (232) during the ten lessons observed, but only a small percentage (15%) of these were higher order questions. North Hill learners asked a total of 14 questions over the period of 10 lessons. Half (7) of these were coded as instructional.

A noticeable trend in Mrs Naidoo’s class was the strategy of repeating a learner’s answer, which was often a one-word answer. This may be because the learners are mostly second language English speakers.

Cognitive demand in assessment tasks

At North Hill, in 2005 learners had written five tests and these did include source-based questions and empathy-type questions. They had written three essays and four short homework tasks. These were either definitions of terms or source-based questions. In 2006 all the tests were ‘compliant’ with the demands of the new curriculum and were designed using the guideline given by the Department of Education. The Deputy Principal at North Hill is an examiner for the Senior Certificate and also a provincial trainer for the FET curriculum, so he provided a lot of the official documentation to follow.

The North Hill tests had previously contained source-based and empathy type questions so this shift did not really bring anything new. There were no discursive essays in 2006. The cognitive demand of the test questions included a greater range in 2006. In 2005, 82% of test questions were categorised as Remember Factual Knowledge, and in 2006, 36% of questions were in the same category. Thus it appears that the assessment requirements of the new curriculum resulted in more higher order test questions being asked.

8.13 Conclusion

This chapter has described in detail the pedagogic practice within each of the three case study schools. It is possible to see that each teacher has a different understanding of the purpose of teaching history, that not all have strong identities as history teachers and that the context in which they work obviously impacts on their pedagogic practice. In the following chapter I summarise key aspects of pedagogic practice within each school, so I do not do this here. In the following chapter I also revisit the concept of a 'preferred' pedagogy as this has emerged from empirical work using Bernstein's theories, and compare the pedagogic practice in each school with that espoused by the NCS and a preferred pedagogy.

Chapter 9

The field of reproduction: curriculum change and pedagogic practice

9.1 Introduction

The previous chapter presented a case study of each of the three schools with a detailed focus on pedagogic discourse within Grade 10 history classrooms. This chapter is also located within the field of reproduction. The evaluative rules are linked to the field of reproduction within the pedagogic device. Bernstein constructs pedagogic *discourse* as instructional discourse embedded in regulative discourse. Pedagogic discourse is then translated into a pedagogic *practice* within school classrooms. It is in the field of reproduction that pedagogic practice is regulated at the classroom level. The key to pedagogic practice is continuous evaluation. For Bernstein, evaluation condenses the meaning of the whole pedagogic device. The essence of the teaching relation is to evaluate the competence of the acquirer (Bernstein, 1990).

Firstly, this chapter aims to summarise pedagogic discourse within each classroom and to compare the pedagogy observed in the three schools with the official NCS pedagogy and a preferred pedagogy. Before doing so, it describes the official discourse of the FET history curriculum statement, and recaps what other empirical research has shown about a preferred pedagogy. There was no real difference between pedagogy observed in 2005 and 2006 in North Hill and Lincoln where the teachers remained the same. However, there were discernible differences in the formal assessment tasks set for learners. The chapter moves on to focus on the formal assessment tasks and what changes were observed with the advent of the new curriculum. Thirdly, the chapter examines the way in which the three teachers, who had to implement the Grade 10 curriculum in 2006,

expressed their experiences of implementing the new curriculum in 2006. Finally the chapter discusses the key issues that emerge from the classroom data and the implications for curriculum reform.

9.2 Quantifying pedagogic discourse

The previous chapter has presented a detailed account of pedagogic discourse in the three schools. In order to aggregate the analysis over the five lessons observed in each year, the classification and framing codes were allocated a numeric value (Hoadley, 2005). The numeric values could be aggregated for each category (such as sequencing, pacing, selection etc) in a lesson. Thus for each lesson it was possible to have a numeric number for the strength of the pacing, selection, sequencing and evaluation and the strength of the classification boundaries. These tables are in Appendix K. It was then possible to further aggregate to attain a value for each teacher’s set of lessons. Obviously in the aggregating nuance and detail are lost, but the reduction of the data in this way enables us to compare the pedagogic discourse across schools and teachers, as well as against a preferred pedagogy and the official discourse. The official pedagogic discourse as it is presented in the National Curriculum Statement for Grade 10 –12, for history is reduced and presented in the same way.

Figure 23: Relationship between numeric values and the strength of framing / classification

1	2	3	4
Very weakly framed/ Classified	Weakly framed/ classified	Strongly framed/ classified	Very strongly framed/ classified
F-- / C--	F- / C-	F+ / C+	F++ / C++

Before presenting a quantitative analysis of pedagogic discourse, the following table recaps the history teachers, their experience and qualifications.

Table 15: The history teachers in the three schools

School	Enthabeni		Lincoln	North Hill
History teacher	Mr Mkhize 2005	Mrs Shandu 2006	Mrs Lawrence	Mrs Naidoo
Years teaching experience (as of 2006)	8 years	12 years	18 years	8 years
Qualifications	BA, HDE (Tourism, Geog) Hons (Human Resource Management)	BA (History and English), PGCE, B.Ed Hons	BA (Eng, Psych), HDE	3 year diploma (primary) FDE (Management) B.Ed Hons

9.3 A preferred pedagogy

A preferred pedagogy, which leads to the development of cognitive skills and competences for all learners, has already been discussed in Chapter 2. I recap the key issues here. The theory predicts that there should be visible signalling in the curricular stipulations of the official curriculum (strong framing over the external selection) and strongly framed evaluation criteria. There should also be weak framing over pacing, and weak framing over teacher-learner relations (Muller & Gamble, forthcoming). In terms of classification, the ESSA studies in primary school science favoured weakened intra-disciplinary relations (Morais & Neves, 2001; Morais et al., 2004), while Hoadley's (2007) study in primary school mathematics showed the importance of strong inter-disciplinary and inter-discursive relations. This is shown in Figure 2.

There must be a caveat here, in that there can be no *one* pedagogy that is universal or ideal in *every* formal teaching situation. There are too many variables at play and essentially pedagogy must be a function of a professional teacher's ability to organise systematic learning (Morrow 2006) in a particular context. This study is located in secondary schools, which have traditionally used a performance mode of pedagogy (Bernstein 2000) and the key research in this area has happened in primary schools. However the Bernsteinian classroom research does point to broad areas of focus that are useful.

9.4 Pedagogic discourse in the schools and in the official curriculum

The following table presents the composite data from each teacher and the official discourse as seen in the NCS.

Figure 24: Pedagogic discourse in three school, preferred pedagogy and in the official curriculum

	Framing					Classification		
	Hierarchical	Selection	Sequencing	Pacing	Evaluative	Inter-discip	Intra-discip	Inter-discursive
Enthabeni 2005 <i>Mr Mkhize</i>	F+	4 F++	4 F++	3.6 F++	2 F-	4 F++	4 F++	3.9 F++
Enthabeni 2006 <i>Mrs Shandu</i>	F++	4 F++	3.3 F+	3.6 F++	3.3 F+	4 F++	4 F++	3.8 F++
North Hill 2005 <i>Mrs Naidoo</i>	F+	4 F++	4 F++	3.6 F++	3.3 F+	4 F++	4 F++	3.6 F++
North Hill 2006 <i>Mrs Naidoo</i>	F+	3.9 F++	3.8 F++	3.2 F+	3.2 F+	4 F++	3.9 F++	3.9 F++
Lincoln 2005 <i>Mrs Lawrence</i>	F-	3.4 F+	3.2 F+	2.9 F+	3.3 F+	3.7 F++	3.5 F+	3.4 F+
Lincoln 2006 <i>Mrs Lawrence</i>	F-	3.9 F++	3.8 F++	3.4 F+	3.7 F++	3.2 F+	3.4 F+	3.1 F+
Preferred pedagogy	F-	F++	F++	F-	F++	F++	F-	F+
Official NCS discourse	F-	F+	F+	F-	F++	F++	F-	F+

Chapter 6 presented a detailed analysis of the NCS which is recapped here. The NCS presents a view of knowledge that is loosely classified in terms of intra-disciplinary relations. The knowledge is structured using key historical themes such as power alignments, human rights, issues of civil society and globalization. The knowledge is framed using key questions which link various themes. There is also a weakening at the inter-discursive level in terms of the fourth outcome which focuses on heritage and local

history. Knowledge and the procedures underpinning the discipline are strongly classified at an inter-disciplinary level. The theory of instruction is generally loosely framed, as it is a progressive pedagogy focused on the learner. The evaluative rule is more strongly framed with clear outcomes and assessment standards that must be met. However it can be argued that the outcomes are only explicit in terms of the skills they specify, and that they are weakly framed in terms of the content (Muller & Gamble, forthcoming). The way in which I described this duality in Chapter 6 is F^{++e}/F^{-i} which indicates a strong external framing but a weaker framing internal to the learner.

There is a strong emphasis in the NCS on developing the historical skills of enquiry. Assessment standards show that there is a strong emphasis on conceptual knowledge, with an emphasis on the cognitive skills of understanding and analyzing. The curriculum clearly understands the role of history as developing Constitutional values. The history curriculum is clear on the specializing discourse (that is the practical or procedural discourse, which in the case of history, is the use of sources), but weak on the technical discourse (that is the particular content which makes up history) (Martin, 2007).

9.4.1 Is there any change in pedagogy between 2005 and 2006?

At Enthabeni, the set of lessons in 2005 and 2006 were taught by different teachers, which gives an interesting insight into how pedagogic discourse can differ in the same school with the same type of learners. It is possible to see from Figure 2 that Mrs Shandu gives learners slightly more control over the sequencing and pacing of the knowledge, in that she does accept comments from learners and does require them to do some independent work. The evaluative rule is stronger in her class in that she was more likely than Mr Mkhize to make the criteria of tasks clear and to ask learner to give evidence for the answers that they give.

There is not much shift in pedagogic discourse in the classrooms at North Hill and Lincoln between 2005 and 2006. If the ‘learner-centred’ rhetoric of the curriculum were to be embraced, we might expect learners to be given greater control in 2006. If anything,

Mrs Lawrence takes greater control over selection, sequencing, pacing and evaluation in 2006. I would suggest this is due to the nature of the learners in 2006 (she is teaching the lower of the two streamed classes) and not due to the new curriculum. It indicates that there is a wide range of variables that work to change pedagogy in different contexts. At North Hill, there is a slight change only in the pacing which weakens slightly in 2006. I would suggest that this is due to the nature of the five lessons that I observed, which were focused mostly on learner presentations from a group task they had done. Overall, the pedagogic discourse remains constant in 2005 and 2006.

There is a great deal of literature describing how teachers fail to implement the curriculum policies prescribed by the state. Teachers are variously understood as recalcitrant, incompetent or just plain lazy. There is the underlying assumption that the policy embodies 'good' pedagogic and assessment practice, and what teachers are doing is 'bad', and thus teachers need to change to teach 'in line' with policy. Problems with implementation are seen as lying outside of the policy, and residing in teachers, in the training, in the learning materials, in the lack of resources, etc. However, the Review of Curriculum 2005 showed that the structure of the curriculum itself was flawed in that it did not provide sufficient progression and coherence for systematic learning to take place. The History NCS is part of the revised curriculum development process. It is useful to compare the official pedagogic discourse as exemplified in the History NCS with what research suggests is a preferred pedagogy, and then to compare this to the pedagogic discourse observed in the classrooms. It is possible to do so as the language of description for analysis across the two levels is the same.

9.4.2 Comparing official discourse, preferred discourse and classroom discourse

Hierarchical rule

Studies suggest that the hierarchical rule needs to be weakly framed (F-), where there is an open relationship between the learners and the teacher.³⁴ This personalised attitude to pupils is a typical characteristic of the progressive approach and is seen in the NCS. This attitude was seen at Lincoln where learners were often self-regulating (F-) and Mrs Lawrence created a more informal atmosphere where learners were allowed space to ask questions and make comments. Discipline was mostly personal (F--). This was the only classroom where learners and the teacher shared jokes and where learners asked a substantial number of questions. For example, a discussion about population growth in industrialising Britain leads to a learner speculating whether people would have had more time to have sex when they were living in the countryside than when they had moved to the cities. It is hard to imagine learners in either of the other two schools having the freedom to initiate the same kind of discussion.

Mrs Naidoo admonished her learners often, using a positional form of control that appealed to rules or a personal form of control, where the effect of the learner's behaviour on him or herself on the teacher, or on others is explained. The following is an example of a personal form of control:

Now you are all making a noise and you are not allowing other people to talk, if you don't allow other people to talk, then you won't listen and you won't understand this section.

At Enthabeni, control was more explicit (F+) and was established through the pacing and sequencing of the lesson and though the teacher talking for most of the lesson time. Mrs Shandu at Enthabeni makes use of a positional or imperative (F++) form of control where

³⁴ However these studies have all been done in the Western world. Research from developing contexts (Tabulawa, 1997, Barret 2007) have shown that this open relationship is at odds with community norms which emphasise deference and respect between adults and children. Surely it cannot be true that the hierarchical rule *must* be weakly framed in order for genuine learning to take place?

the teacher becomes angry and threatens the learners. In one instance she sends two boys out of the class and threatens to do the same to two more.

The regulative discourse at Lincoln most closely mirrors the weak hierarchical rule favoured by the NCS and a preferred pedagogy.

Sequencing, selection and pacing

A preferred pedagogy suggests strong framing (F++) over the selection and sequencing of knowledge and weakened pacing. The NCS seems to suggest a slightly weaker framing (F+) over selection and sequencing and also weaker pacing. All the teachers in this study have strong control over the selection and sequencing of their lessons. What was to be covered and the sequence in which it would be covered was the teacher's decision, although content was externally regulated by the curriculum statement. At Enthabeni and North Hill, the pacing was also strongly framed, while at Lincoln the learners had some opportunity to insert their own comments into the lesson, thus giving learners a little control over the pacing of the lesson. This was the only class where learners asked a substantial number of instructional questions or offered comments that were not a direct response to the teachers' question. This occurred more in the 'bright' class of 2005, but also happened in the 2006 class. At Enthabeni only the teacher asked questions. At North Hill, learners asked questions very seldom.

The number of questions asked by learners and their active participation in thinking about key issues, as well as the level of cognitive demand of the questions at Lincoln is most closely aligned to the demands of the curriculum and to a preferred pedagogy.

Evaluative rule

A preferred pedagogy requires that the evaluative rule is strong (F++), which is to say the criteria are made explicit. The indicators used to measure strong framing include the teacher making the evaluative rules very clear, constantly monitoring the work that

learners do, always requiring learners to give reasons for their answers and rigorously evaluating the learners' productions.

The NCS certainly has a strong focus on evaluation, with four stipulated learning outcomes, assessment standards and numerous competence descriptions to be reached at various levels. Thus it appears the evaluative rule is strong, as the criteria are apparently made explicit. But as already mentioned, the outcomes only describe skills and not the content. There are also critiques that point out that as the outcomes become more and more specific, in fact they become more opaque (Allais, 2006; Eisner, 2000).

The evaluative rule in Bernstein's terms does not help us to make a distinction between the criteria of skills and the criteria of content, which in the case of the NCS are differently framed. Here it is useful to turn to the work of Dowling (1998; 1999), who moved away from Bernstein's concepts, eschewing framing all together and developing an external language of description in the gap around classification. He considers the strength of classification of a discourse as varying according to two dimensions – classification of content and mode of expression (Ensor & Galant, 2005). I focus here on the concept of domains of practice.

A domain of practice refers to pedagogic activity in terms of two components, firstly the signifier (ie. Its form of expression – the words, symbols, layout and format used in a pedagogic communication) and secondly, the signified (ie. The nature of the content principally denoted by the signals). Each of these components may be described as either weakly or strongly classified according to the level of ambiguity of each with respect to other activities. The combinations of strong and weak descriptors of classification for signifiers and signified, give rise to four distinct domains of practice. A domain of practice is considered to be 'esoteric' if both content and form of expression are strongly classified. Dowling makes it clear how this maps out for the pedagogic practice of mathematics, but this would still need to be done for the pedagogic practice of history. It suggests that the esoteric domain is one where the content is clearly history and the form

or procedure is clearly history. Or as Lee and Ashby (2001) would have it, both the substantive and procedural dimensions are present.

We have seen that the NCS very strongly advocates an enquiry- based approach, particularly in assessment, and this would be a procedural dimension of history. However, this is not the only procedural element. There are others, such as setting up causal explanations and building strong arguments based on evidence (Coffin, 2006a).

The evaluative rule shows a key difference between the four classrooms. Mrs Lawrence showed very strong framing (F++) of the evaluative rule when it comes to the kinds of verbal answers required of learners. Her learners are almost always required to give a reason for their answer; she will often elaborate on an answer and will always say if an answer is incorrect. She always made the criteria for the required performance clear. She usually evaluated learners' performances, the only time she did not do so is when learners did a role-play of a talk show programme where they were playing the roles of child labourers, trade unionists, factory owners etc.³⁵

In terms of the verbal answers required of learners, Mrs Naidoo shows strong framing (F+) as learners are often required to give reasons for their answers. She also made the evaluative rules clear and monitored learners in their work. She did not rigorously evaluate learners' performance.

Mr Mkhize shows weak framing (F-). Learners are only sometimes required to give reasons for their answers and the teacher only sometimes shows why an answer is incorrect. The evaluative rule is stronger in Mrs Shandu's class than in Mr Mkhize's. She often made the evaluation criteria clear but did not often rigorously evaluate learner's productions (F+).

³⁵ My own interpretation of this is that she saw the task (taken from a textbook) as lacking in both history content and skills, and thus hardly worthy of evaluation.

The strong framing shown at Lincoln most closely mirrors that required by the NCS and a preferred pedagogy.

Classification

A preferred pedagogy suggests strong classification at the inter-discursive and inter-disciplinary level, and weaker classification at the intra-disciplinary level. The NCS suggests the same, but with some weakening at the inter-discursive level. At Enthabeni and North Hill, there is very strong classification (C++) in both the inter-disciplinary and the intra-disciplinary relations. In neither of these classrooms is there any mention of any other subject content, nor are any links made between the particular topic under discussion and any other topics in the curriculum. At Lincoln, there is a weakening of the intra-disciplinary boundaries (C+), where contents from other subjects and contents from other history topics are sometimes referred to. Mrs Lawrence consistently makes links and references to other topics in history. This is closest to the discourse of the NCS.

In terms of inter-discursive classification, there were differences in each classroom. At North Hill, Mrs Naidoo seldom made mention of everyday knowledge in the ten lessons I observed. Thus the lessons are very strongly classified (C++). The other three teachers made occasional references to everyday knowledge, but did so in different ways. What emerged here was that the classification strength (C- to indicate a loosening of boundaries) did not capture the qualitatively different ways in which the teachers integrated everyday knowledge.

Differing quality of inter-discursive C

One way of describing or understanding how teachers use everyday knowledge in the classroom is through the concept of pedagogical content knowledge (PCK) which Shulman (1986) describes as ‘the most useful forms of representation of those ideas, the most powerful analogies, illustrations, examples and demonstrations – in a word, the ways of representing and formulating the subject that make it comprehensible to others’.

Often analogies, illustrations and examples of key concepts or ideas are taken from learners' everyday worlds. Teachers use analogies, illustrations and examples with varying degrees of success.

In one lesson in 2005, Mr Mkhize draws an analogy between urban tenement slums in industrializing Britain and the informal settlements that learners are familiar with in South Africa. He does not make clear when the analogy holds (for the living conditions) and where it does not (that slums in eighteenth century Britain do not look the same as informal settlements in twenty-first century South Africa).

In contrast when the word 'slum' comes up during a test review on living conditions during the Industrial Revolution (2006/4), Mrs Lawrence deals with it in a different way.

T: Who remembers the name for those block buildings, we'd call it a block of flats? Yes?

L: Slum.

T: Slum doesn't have to be a block of flats; it can just be shack dwellings. Tenement. These blocks of flats were tenements.

Here Mrs Lawrence makes it quite clear that while a tenement might be a slum, a slum is not necessarily a tenement. So while both incidents would be classified as C- (inter-discursive), this masks the different ways in which the teachers explain the analogy.

A conceptual knowledge structure

The NCS requires an integrated approach at the intra-disciplinary level in that the content is taught organised according to themes, with specific studies as exemplars of these themes. Chapter 6 showed how the NCS orders knowledge as an intensional hierarchy. Intensional hierarchies reach for abstract principles from which larger and larger domains of explanation can be generated (Hugo, 2005), whereas extensional hierarchies work with ever enlarging contexts. NCS orders the curriculum around key concepts, for example, the quest for liberty and then uses the French Revolution as a concrete example of that abstract concept. The focus is on the ideas or concepts of liberty, equality, fraternity and

individual freedom, rather than the detail of the specific example. It is the abstract principles that order the curriculum. The NCS increases the level of complexity, from a narrative type to a conceptual type. This does not mean that the narrative has no place, but rather that one has such a good command of the narrative that one can draw out key concepts and patterns from it.

While acknowledging that five lessons is a short time to make clear observations about whether this is happening in classrooms, I do draw some tentative conclusions from the 2006 data. Mrs Lawrence displayed something of this approach in a lesson where she recapped the key shifts that had occurred through the industrial revolution. Using drawings which symbolised life in the 1750s and in the 1850s, her purpose was to show the broad sweeps of change that had occurred, rather than concentrating on the particular details. However, her teaching in 2005 had also shown that her focus was on building conceptual development, rather than simply a narrative of facts.

In contrast Mrs Naidoo's approach to teaching the French Revolution in 2006 focused on the traditional points of the economic, political, social causes, the role of the philosophers etc. Mrs Shandu was following a new curriculum textbook very closely, and thus her teaching is intensionally structured. For example, when starting the section on slavery, the concept of 'what is a slave' is discussed first. She ends the section on colonialism with a summary of the effects of colonialism. What was striking though, was that learners did not seem to have the underlying narrative of the topic. Although this was a recap of work covered before, it was clear that most learners had little idea of what the teacher was talking about. A group task to 'discuss the effects of colonialism' resulted in learners copying directly from the textbook with little understanding. The learners who reported back showed no sense of the difference between *colonies* as noun, *colonise* as verb, and *colonialism* (what Martin calls a grammatical metaphor). This is a vital understanding in history where time is often nominalised and grammatical metaphor names the process that engenders vertical discourse (Martin, 2007). These students did not have access to the specialised discourse of history.

None of the teachers, in the 2006 lessons observed, taught explicitly to the key questions that order the curriculum. There was no sense that their teaching revolved around these key questions as required by the NCS. Mrs Lawrence admitted that she did not teach using the key questions, although she did use these questions to set the tests. Mrs Shandu was probably closest to the NCS requirements, as she taught directly from a new textbook, which was ordered using these key questions.

It is unsurprising that the implementation of a new curriculum did not directly impact on the way in which teachers ordered the history knowledge. A way of understanding history as a narrative, as a set of facts that have been ordered and grouped in particular ways (around political causes or social causes, for example, or chronologically) is deeply ingrained and not easy to shift. The NCS training did not focus on the knowledge aspect of the curriculum; it did not address how to teach history in a way that focuses on concepts and patterns. The training addressed the issue of shifting from ‘knowing history’ to ‘doing history’ with a great emphasis on using sources and developing questions around sources. Skills have been emphasised far more than content. Textbook writers do seem to have grasped the shift to a conceptual understanding of broad themes, rather than on lots of factual details.

9.5 Conceptual demand

Classification and framing shows us the inner logic of pedagogy, using a language that describes education in its own terms. They describe the relay, but not what is relayed, which is exactly what Bernstein set out to do. However, it does become important to understand better the quality or the nature of the knowledge that is relayed or evaluated. We need to look elsewhere to give us a purchase on the cognitive complexity of the learning and teaching happening in the classroom.

I now turn to using Bloom’s taxonomy to analyse the tasks that learners do during the lessons. I then analyse the types of questions asked by teachers and by learners. Lastly I analyse the assessment tasks in the form of tests that learners are required to complete.

Taken together, this analysis gives insight into the levels of cognitive complexity in the learning process.

While Bloom's Taxonomy does give some insight into the cognitive and knowledge levels, it is a generic tool. It does not provide a language that is specific to the learning of history in particular. A more specific analysis tool is provided by Coffin (2006a) who describes the range of writing genres that history learners need to master. She suggests that there are three broad groups of genre – the recording genres, the explaining genres and the arguing genres. Coffin shows how these are hierarchical in that the basic recording genres (such as autobiographical recount) are more closely linked to the everyday, while the arguing genres are far removed from the everyday. I do not do so here, but recognise that it would be a worthwhile research endeavour to further analyse the assessment tasks using these genres.

9.5.1 Conceptual demand of in-class tasks

All in-class tasks done in the three schools are described in Figure 25. In terms of the conceptual demands of the tasks learners are expected to do, at Enthabeni in 2005, learners were not set any tasks during the four lessons I observed. Two in-class tasks were done in 2006. One was essentially a comprehension task (A1) and one was an empathy task, imagining one was a slave and writing a diary entry (B2). From the learner's report backs on the first task, it was clear that most groups had simply copied out the parts of the textbook which they hoped answered the question.

Figure 25: Description of tasks learners did during five lessons, 2005 and 2006

School	Year	Description of tasks	Classification	Group/ Individual	Conceptual demand
Enthabeni	2005	No tasks			
	2006	1. Briefly describe the effects of colonialism. 2. Write a diary entry describing a day in the life of a slave.	C++ C-	Group Individual	Recognise Factual Knowledge (A1) Understand Conceptual Knowledge (B2)
Lincoln	2005	1. Categorise information into the Pluses, Minuses and Interesting issues of a particular economic ideology 2. Write a one-page response to the quote "The past is prologue" with respect to the Industrial Revolution	C+ C++	Group Individual	Understand Conceptual Knowledge (B2) Analysing Conceptual Knowledge (B4)
	2006	1. Assessing three different paragraphs written in response to the question "Did the lives of ordinary working people really improve?" Learners are given a list of criteria to use to assess the paragraphs. 2. Learners host a 'talk show' on the topic of child labour. One learner is the talk show host, one a govt official, one a unionist, one a child labourer and one a factory owner.	C- C-	Individual Group	Evaluate Conceptual Knowledge (B5) Understand Conceptual Knowledge (B2)
North Hill	2005	1. Do five different pictures represent the domestic or the industrial system? Pictures are labelled 'Spinning and lace making at home', 'Spinning machine', 'Weaver at home', 'Spinning a in a factory' and "Cloth hall market". 2. Using notes supplied, write down four reasons that the Industrial Revolution began in Britain. 3. Answering questions from a set of information. Almost all of the answers are easily found in the text.	C++ C++	Pair Individual Group	Remember Factual Knowledge (A1) Remember Factual Knowledge (A1) Remember Factual Knowledge (A1)
	2006	1. Making a poster and presenting information from the notes given to the class on either the social, political or economic causes of the French Revolution. 2. Answering questions on the income and expenditure statement of Louis XVI.	C- C+	Group Individual	Understand Factual Knowledge (A2) Remember Factual Knowledge (A1)
			3. Imagine you are a peasant in France. Write a letter to a friend in another country and explaining to him/her why you are so unhappy. 4. Answering questions on a cartoon.	C- C+	Individual Individual
		5. A diary entry explaining the burdens that are placed on you as a peasant by the privileged classes.	C-	Individual	Understand Conceptual Knowledge (B2)

The group tasks at North Hill were of a low level conceptual demand, generally requiring that learners only Recognise Factual Knowledge (A1). From the learner's report-backs, it became clear that most groups had either not understood the questions or were not able to find the answer in the given text. Their report backs consisted of repeating large chunks of the given text verbatim, presumably in the hope that the answer was to be found somewhere in that text. Where tasks were more demanding, such as designing a poster and a presentation on the economic/ social/ political causes of the French Revolution, these were generally executed poorly and Mrs Naidoo would teach that section again.

The tasks done by Lincoln learners in class all required conceptual rather than factual knowledge and usually demanded understanding or analysis. Of the four tasks, all were strongly classified in terms of dealing with history knowledge, but two were weaker in terms of procedure.

Recognition and realisation rules

Evaluation is about the production of the legitimate text, and the strength of the classification has implications for this. Do learners know what the legitimate text looks like (recognise it) and can they produce it themselves (realise it)?

While all of the tasks were strongly classified in that the *content* they covered was historical content, the form or procedure of some tasks was more weakly classified. For example, evaluating other learners' writing using a set of given criteria, writing a letter to a friend or a diary entry could also fit comfortably into an English classroom and the role-play of a talk back show could be part of a drama or an English lesson. Here it would depend on the learner's gaze, an historical gaze would enable one to 'see the history' in the task and respond appropriately.

Enthabeni learners had to write a diary entry describing a day in the life of a slave. I was not able to look at what learners produced for diary entry task, but Mrs Shandu spent some minutes explaining the task, which seemed to indicate that learners were not very familiar

with this kind of writing. My judgement would be that most of the learners would have neither the substantive dimension (the content knowledge) nor the procedural knowledge to respond to this task adequately.

The form of the questions was sometimes weakly classified in tests also. In a Lincoln test on the industrial revolution in 2006, a question was: ‘Imagine you are having a class discussion and your class mate says if things were so bad, why didn’t they just pack up and move back to the countryside?’ Mrs Lawrence is going over the test in class the day after it was written. She comments:

Now we had some very interesting answers here. I was hoping that what would flash in your mind was that term we learnt about – ‘enclosure’... So someone said that they haven’t been educated and they can’t read a map and they won’t find their way. (Learners laugh) No, don’t laugh why’s that not a valid answer?

The teacher had a clear idea of what the legitimate text was, but this was not that clear for many learners. They did not have the appropriate historical gaze that prompted them to respond to the question using substantively *history* knowledge. Some responded to a loosely classified question using everyday knowledge, rather than thinking about the historical fact that enclosure of the common land meant that they did not have any land to move back to. Mrs Lawrence tries to show what an historically valid answer would be. One wonders why the question was phrased in this way, when it would be simpler and clearer to ask: ‘Why were people who had moved to the cities not able to move back to the countryside?’

9.5.2 Conceptual demand of questioning

In the classroom data, it seemed important to also categorise the cognitive demand of the questions asked by teachers. Questions within the instructional domain were categorised as either lower order (recall or remember) or higher order (understand, analyse, evaluate, create).

Table 16: Questions asked by teachers in three schools in 2005 and 2006

School		Lower order	Higher order	Total
Lincoln	2005 (5 lessons)	31 (40%)	46 (60%)	71 (100%)
	2006 (5 lessons)	108 (70%)	46 (30%)	154 (100%)
Enthabeni	2005 (4 lessons)	76 (82%)	17 (18%)	93 (100%)
	2006 (5 lessons)	49 (77%)	15 (13%)	64 (100%)
North Hill	2005 (5 lessons)	111 (86%)	18 (14%)	129 (100%)
	2006 (5 lessons)	88 (85%)	15 (15%)	103 (100%)

What is clear from Table 16 is that the three teachers at Enthabeni and North Hill generally ask significantly more lower order questions (ranging between 77% to 86%) than they do higher order questions. At Lincoln, the incidence of higher order questions is greater. What is interesting here is the difference between the 2005 and 2006 data. In the 2005 class the teacher asks 60% higher order and 40% lower order questions, whereas in 2006 it is 30% and 70% respectively. A reason for the difference may be that the 2005 class was the ‘top’ class. It appears that it is easier for teachers to ask higher order questions when the learners are willing and able to answer such questions. It is this same class (Lincoln 2005) that the learners ask a significant number of questions (see Table below), which is not the case in the other classes.

Perhaps it may be the cognitive ability of the learner as well as the teacher that determines the frequency of higher order questions. In other words, do teachers ‘read’ the cognitive ability of their learners and ask them the kinds of questions that they are capable of answering? At Lincoln the same teacher, Mrs Lawrence, directs more higher order questions to her ‘top’ class in 2005 than to her ‘lower’ class in 2006. At Enthabeni, where Mr Mhikze taught the 2005 class and Mrs Shandu taught the 2006 class, the levels of questioning are similar. In both these classes the calibre of learner would be similar, as the classes are not streamed in any way.

Number of questions asked by learners

All the questions asked by learners in the whole class discussions were counted. Questions asked of the teacher by individuals when they were busy doing an individual or group task were not counted, as the video recorder did not easily pick these up. Learners' questions were then categorized as either administrative (for example, requesting information about writing a missed test, or about when to start a group report back), or as instructional. Instructional questions were those that pertained to the topic under discussion.

Table 17: Numbers of questions asked by learners in three schools in 2005 and 2006

	School	Administrative	Instructional	Total
Lincoln	2005 (5 lessons)	11 (25%)	32 (75%)	43 (100%)
	2006 (5 lessons)	8 (26%)	23 (74%)	31 (100%)
Enthabeni	2005 (4 lessons)	0	0	0
	2006 (5 lessons)	1 (100%)	0	1 (100%)
North Hill	2005 (5 lessons)	7 (58%)	5 (42%)	12 (100%)
	2006 (5 lessons)	0	2 (100%)	2 (100%)

The pattern here is again quite clear –the learners in the Lincoln class ask a far greater number of questions than do the learners in the other two classrooms. For both the 2005 and 2006 classes, three quarters of the questions asked were related to the instructional material. In 2005, Enthabeni learners never asked any questions, neither of an instructional nor an administrative nature. In 2006, only one question was asked and this was an administrative question. North Hill learners did ask some questions, but less than half of these were coded as instructional. North Hill learners asked a total of 14 questions over the period of 10 lessons compared to 74 asked by Lincoln learners over 10 lessons.

One question that arises is ‘why is that that only Lincoln learners ask a substantial number of questions?’ Is it their ability to formulate a question and their ability to articulate it, is it that the teacher expects learners to ask questions, is it the response of the teacher; is it there home

backgrounds that nurture curiosity and open debate? As seen below there is also a correlation between the number of higher order questions asked by the teacher, and the number of instructional questions asked by the learners, which might lend weight to the idea that the kinds of questions teachers ask is dependent on the (perceived) cognitive ability of their learners. Learners may ask few questions because their knowledge base in history is weak or because they do not know how to articulate a question. The issue of questioning is probably linked to language of instruction. All the learners at Enthabeni and the majority at North Hill are learning in English which is not their mother tongue, and it is at these two schools that learners ask almost no questions and teachers ask only low level questions. In both these schools teachers tend to repeat the same questions, giving the impression that learners do not understand them the first time. Or learners simply do not answer, and the teacher 'fills in the silence' by repeating the question.

At Lincoln there is obviously a classroom ethos (F-) that makes learners feel safe enough to ask questions, and learners are constructed and understood (by Mrs Lawrence, but probably also by the school as a whole) as people who can and should ask questions.

In the following excerpt, Mrs Lawrence is recapping the changes brought about by the Industrial Revolution, using line drawings on overhead transparencies. Learners are looking at a drawing depicting a poor person and a rich capitalist.

T: (puts up new OHP) Then we have our very caricatured poor person with all the patches on his clothes. And we have our very overt capitalist, with bowler hat. So explain the shift from poverty to power. (silence)

L: (inaudible)

T: I guess the general base line was quite low.

L: It gave power to (inaudible) the structure, it gave them power over the rest of the people...

T: Yes, it did but here we are looking at individual levels, so try and rethink what you have said in terms of the individual. Siobhan?

L: If you were a factory owner before the IR, and when the IR came along you (inaudible).

T: Sure. What class of person is this? Kirsty, what were you going to say?

L: I was going to say if poorer people got a bit of capital or something they could make a factory and they run their factory and become successful and they could even join the House of Commons...

T: OK, what is our term for moving up the social hierarchy? Social mobility. So the same person from this downtrodden class could get some power, political or economic power.

This kind of learner- teacher exchange is in sharp contrast to the typical question-and-answer exchanges observed at Enthabeni and North Hill where teachers use the strategy of repeating a learner's answer, which was often a one-word answer. This may be because their learners are all (Enthabeni) or mostly (North Hill) second language English speakers. The following is a fairly typical exchange in Mr Mkhize's classroom:

T: Who can remind me about the work we did yesterday?

L: We did Industrial Revolution.

L: French Revolution.

T: Yesterday? No, we spoke about the Industrial Revolution. We said what was the Industrial Revolution?

L: (reading from notes) A gradual process which resulted in a radical change.

T: A gradual process which resulted in a radical change. Where did it start?

L: Britain.

T: Britain. Why did it start in Britain?

L: It had more natural resources.

L: Capital.

T: More capital resources to make industry.

L: Machinery.

9.5.3 Conceptual demand of the formal assessment tasks

Details of the type of assessment and the number of assessment tasks that the learners had done in the three schools are detailed in Chapter 8. Here I want to work with the data that emerged from analysing all questions using Bloom's Revised Taxonomy. Three³⁶ tests from each of the three schools in each year were analysed using Bloom's Revised taxonomy to establish the cognitive demand and the knowledge level of each of the questions in the test. Two researchers coded each question. The coding was discussed and a final decision made. Examples of how various questions were coded are found in Appendix L.

³⁶ In 2006, I was able to get only 2 tests from Enthabeni.

Tests in 2005

First I present an analysis of all the assessment tasks done by learners in the three schools in 2005 (Table 18). This shows the percentage of marks in a test that fell into a particular cognitive and knowledge category. For example, for the French Revolution test at Enthabeni, 100% of the marks fell into the *Remember Factual Knowledge* category, whereas as Lincoln, 26% of the marks of their French Revolution test fell into that category.

In 2005 at Enthabeni all the questions (100% of the marks) in each test focus on remembering factual knowledge. The tests at North Hill have a greater spread across the cognitive processes and the forms of knowledge, but a majority of marks were allocated to questions that required that learners remember factual knowledge. Where questions do range across the taxonomy grid, they tend to be for only a small percentage of marks.

Lincoln had the greatest spread of marks across both the cognitive process and the knowledge dimension. This school allocated a substantial number of marks to questions that required learners to analyse or evaluate the source material. In each of the three tests, about one fifth of the marks were allocated to this type of knowledge.

Tests in 2006

Table 19 shows the cognitive and knowledge demands made in the 2006 tests in each of the three schools. Not much changes at Enthabeni where the marks of one test are still all testing recall of factual knowledge (A1) but in the second test, 20% of marks are testing understanding of conceptual knowledge (2B). At North Hill there are fewer questions which test the recall of factual knowledge and a greater spread of questions in the categories of understand factual knowledge and recall and understand conceptual knowledge. At Lincoln, there is ironically less of a spread of questions across the conceptual and knowledge dimensions than there was in 2005.

In terms of changes in assessment at the cognitive and knowledge levels, it seems as if the introduction of the NCS in 2006 has had little impact at Enthabeni. At North Hill the tests do show a greater range covered, and in 2006 there are fewer questions in the ‘remember factual knowledge’ category and more questions in the ‘understand factual knowledge’ and ‘remember and understand conceptual knowledge’ categories. At Lincoln in 2006, there are in fact fewer questions in the ‘understand and analyse conceptual knowledge’ categories than there were in 2005.

Tables 18 and 19 plot the cognitive and knowledge demands of the test questions at the three schools in 2005 and 2006, respectively. Table 20 places all this information in one table so that the comparisons across schools and years can be made.

Table 18: Comparison of tests written at Enthabeni, *Lincoln*, and North Hill, 2005

The Knowledge Dimension	The cognitive process dimension					
	1. Remember	2. Understand.	3. Apply	4. Analyse	5. Evaluate	6. Create
A. Factual knowledge	(E) French Rev 100% (E) T of Aliwal North 100% (E) Industrial Rev 100% (L) <i>Jack the Ripper</i> (28%) (L) <i>French Revolution</i> (26%) (L) <i>Napoleon</i> (34%) (N) Apartheid (66%) (N) Congress of Vienna (100%) (N) French Revolution (83%)	(L) <i>Jack the Ripper</i> (24%) (L) <i>French Revolution</i> (16%) (L) <i>Napoleon</i> (20%) (N) Apartheid (16%) (N) French Revolution (7%)		(L) <i>Napoleon</i> (6%)		
B. Conceptual knowledge	(L) <i>French Revolution</i> (2%)	(L) <i>French Revolution</i> (48%) (L) <i>Napoleon</i> (40%) (N) French Revolution (10%) (N) Apartheid (10%)		(L) <i>French Revolution</i> (8%) (L) <i>Jack the Ripper</i> (28%) (N) Apartheid (8%)	(L) <i>Jack the Ripper</i> (20%)	
C. Procedural knowledge						

Table 19: Comparison of tests written at Enthabeni, *Lincoln*, and North Hill, 2006

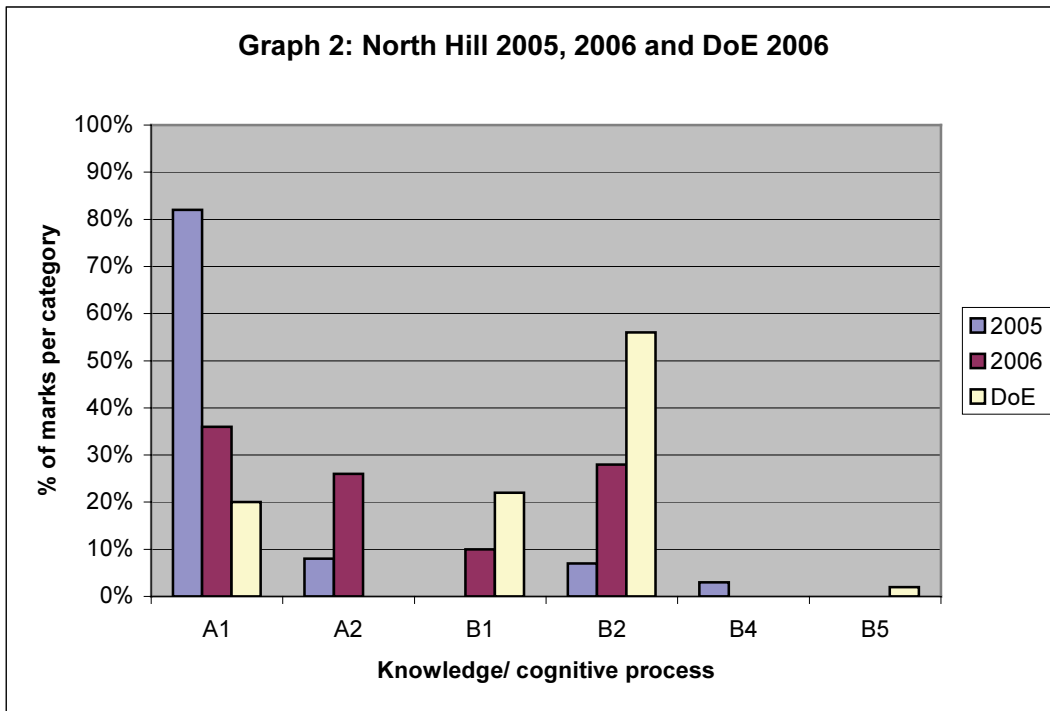
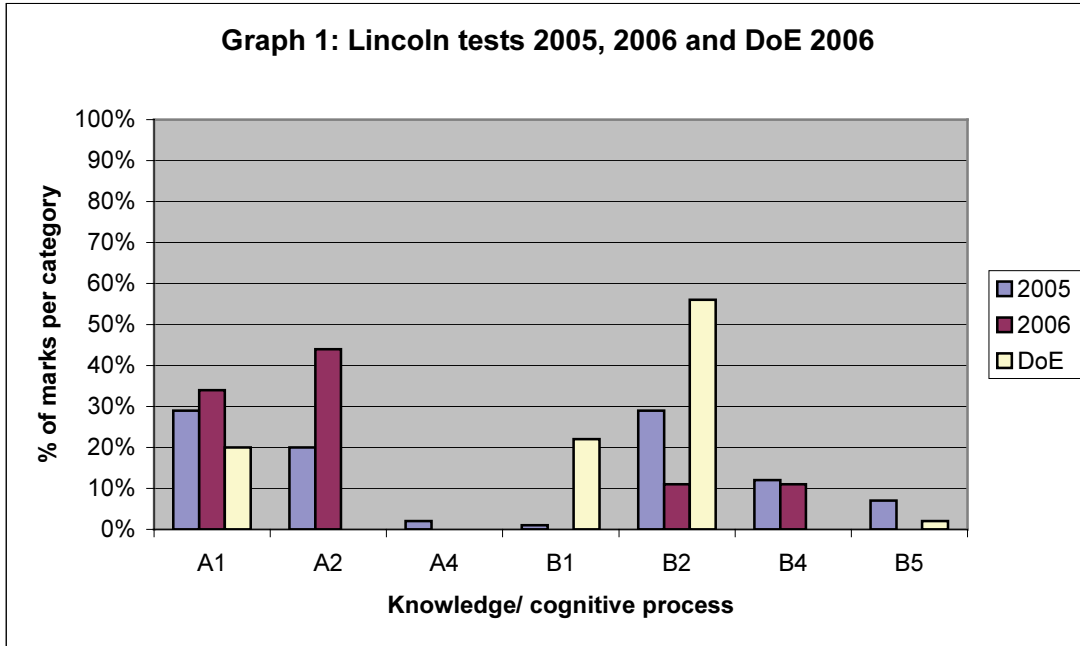
The cognitive process dimension						
The Knowledge Dimension	1. Remember	2. Understand.	3. Apply	4. Analyse	5. Evaluate	6. Create
A. Factual knowledge	<p>(E) Monomotapa Empire 100%</p> <p>(E) Colonies (60%)</p> <p>(L) <i>Ind Rev</i> (40%)</p> <p>(L) <i>Quest for liberty</i> (22%)</p> <p>(L) <i>Slavery</i> (40%)</p> <p>(N) Slave trade (52%)</p> <p>(N) Slave trade/IR (36%)</p> <p>(N) June exam (20%)</p>	<p>(L) <i>Ind Rev</i> (60%)</p> <p>(L) <i>Quest for liberty</i> (66%)</p> <p>(L) <i>Slavery</i> (8%)</p> <p>(N) Slave trade/IR (56%)</p> <p>(N) June exam (22%)</p>				
B. Conceptual knowledge	<p>(N) Slave trade (8%)</p> <p>(N) Slave trade/ IR (8%)</p> <p>(N) June exam (13%)</p>	<p>(E) Colonies (40%)</p> <p>(L) <i>Slavery</i> (32%)</p> <p>(N) Slave trade (40%)</p> <p>(N) June exam (45%)</p>		<p>(L) <i>Quest for liberty</i> (12%)</p> <p>(L) <i>Slavery</i> (20%)</p>		
C. Procedural knowledge						

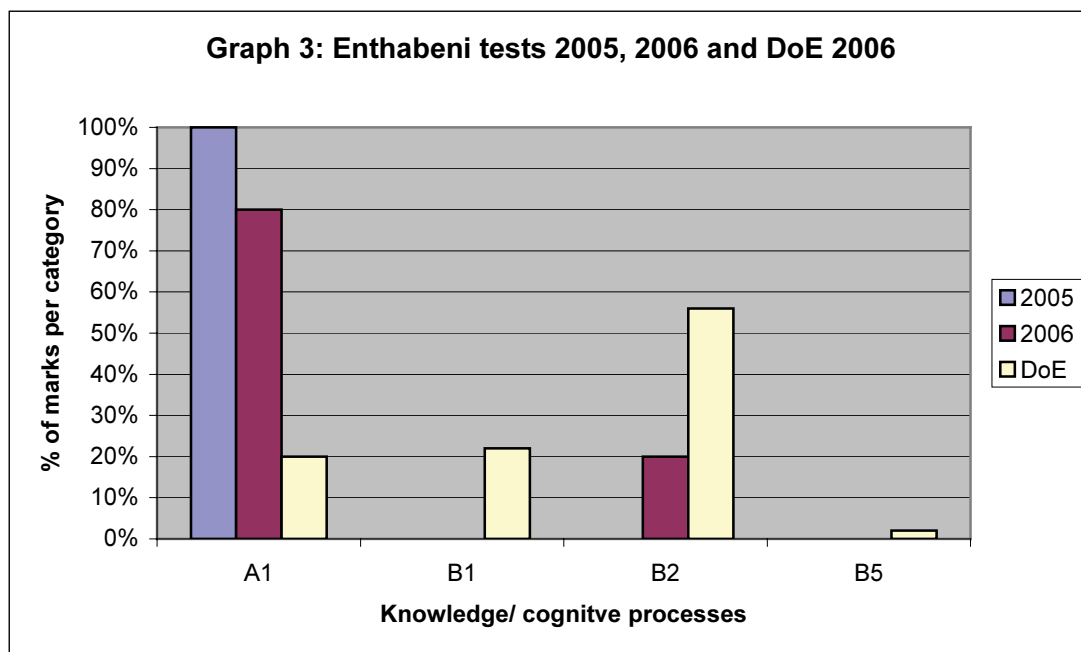
Table 20: Cognitive/ knowledge dimensions of tests written at Enthabeni, Lincoln and North Hill, 2005 and 2006

The percentage for each school is an average of the three tests analysed

		The cognitive process dimension									
The knowledge dimension	1. Remember		2. Understand		3. Apply	4. Analyse		5. Evaluate		6. Create	
	2005	2006	2005	2006		2005	2006	2005	2006		
A Factual knowledge	E 100% L 29% N 82%	E80% (L) 34% (N) 36% DOE (20%)	(L) 20% (N) 8%	(L) 44% (N) 26%		(L) 2%					
B Conceptual knowledge	L 1%	(N) 10% DOE (22%)	(E) (0%) (L) (29%) (N) 7%	(E) (20%) (L) (11%) (N) 28% DOE (56%)		(L) 12% (N) 3%	(L) 11%	(L) 7%	DOE (1%)		
D Procedural knowledge									DOE (1%)		

The following bar graphs show the same data graphically and also compare each school with the KZN DoE History exemplar paper for November 2006.





Thus far the assessment data have been analysed using already established categories of analysis. However, it is also important to approach the data inductively to see what themes emerge that are not caught by Bloom's categories of conceptual demand.

The substance of source based questions

The new FET curriculum requires that learners learn to think like historians and analyse source material in critical ways. There are strongly externally framed guidelines for teachers regarding the form of tests. A test must be structured around a key question, comprise a number of sources with questions and then have one question which requires learners to write an 'extended' piece of writing.

Enthabeni did not use source-based questions in 2005 or in 2006, until learners were given the DoE exemplar paper for their November exam. Both North Hill and Lincoln teachers were using source-based questions in 2005 and continued to do so in 2006. They both complied with the DoE guidelines for testing in 2006.

An analysis of all the sources used in the tests and exams of 2006 show that generally the way in which the sources were used in the assessment tests analysed here does not

require learners to use the insights and skills of historians. Sources were used in different ways in the various tests and exams. I describe these roles in the following way:

Sources as decoration

Sources as comprehension exercises

Sources as historical documents.

Sources as decoration describes the presence of a source but in fact the questions that are asked do not rely on the source at all. The source appears to be there simply as a prompt, as decoration. An example of this is from North Hill 2005 test on the Congress of Vienna. Source A is a copy of a painting showing the men who met at the Congress of Vienna. Learners are told to ‘study Source A’ and then answer these questions:

1.1 *Why did the great powers meet in Vienna?*

1.2 *Name the great powers and the countries from which they came.*

1.3 *List the 3 principles followed by the Congress.*

However the source gives them no support in answering these questions, except perhaps 1.2 as three of the men’s names are given beneath the picture. But otherwise all these questions rely simply on learners remembering facts that they have learnt. So on the surface, the question takes on the *form* of ‘progressive’ history teaching where the use of sources is valorised, however the *substance* or *function* of the reform is not there. Siebörger et al (1993) found the same thing their analysis of National Senior Certificate exam papers in 1989, where they describe a poorly constructed source-question which consists of a graph which seems to serve a decorative, rather than information-giving purpose. So its not that this is a new phenomenon. It seems here that some teachers were able to grasp the new *form* of assessment that that was required (in this case that the use of sources is a good thing in history), not the *function*. Saxe et al (1999) refer to a similar finding in examining mathematics teachers’ assessment practices in the context of educational reform.

Sources as comprehension exercises describes the use of a source which does contain information but learners are required to engage with the source at a low cognitive

level. Essentially they are asked to simply identify particular facts from a source. An example is when learners are given a picture of a 'dompas' and are asked to name any five pieces of information that was contained in it. In this example, learners are in fact engaging with the source, but at a very low cognitive level. They are simply reading off information such as 'name and surname', 'race', 'language' etc. Learners are not required to engage in any kind of analysis of the source. So although the question has the appearance of being source-based, it requires learners to simply retrieve information.

Learners are required to actually engage with the source as *an historical document* when they are asked to evaluate the usefulness of a source, or to analyse its particular bias, the reason it was written and the audience for which it was written, to read 'between the lines' or to compare two different perspectives on the same event. For example, in a Lincoln 2005 test, learners are given an extract from a contemporary newspaper article about the storming of the Bastille. One of the questions asks them to establish whether the source is biased in favour of or against the Revolution.

An analysis of all the sources used in 2006 tests (a total of 72 sources) showed that learners were required to engage with only six sources (8%) as *historical* sources. So overall, despite the curriculum desiring a 'learners as historians' approach, and tests having a 'source based' appearance, learners were not being required to engage with sources as historians do.

If learners are to 'be historians', they should be working with 'authentic historical sources' which would be primary sources. Primary sources are those produced at the time of the event by a person who experienced or witnessed the event in question. Secondary sources interpret and draw conclusions about events reported in the primary sources. In the 2006 test sources analysed, less than half (46%) of the sources were primary sources. In some of the tests excerpts from books are used as sources. For example in the DoE November exemplar paper Source 4A is an extract from the Readers Digest explaining the Mfecane. There is no date or full reference given for the excerpt. Essentially it is a synthesis of the debates around the Mfecane. But it appears to be presented as verifiable facts. There is no way that learners could engage

with this source as an historical source since it is not one. This kind of ‘source’ lends itself to, at best, comprehension questions.

Seldom are learners given much information about the origin, purpose or writer of a source. Only eleven (15%) sources of the total of 72 which were analysed were fully referenced in that the learners were given the name, the occupation of the writer, the purpose for which the source was produced and the date it was produced. An example is a source in the DoE November exemplar paper, which reads: ‘This is a source from Olaudah Equiano’s autobiography. He outlines some of his experiences when he was kidnapped from a village in Nigeria and taken aboard a ship to America.’ There are no dates given, we do not know when the author lived, nor when he wrote the text. Was it from a diary written at the time he was captured? Or was it a memoir written some years later? Thus it is very difficult for learners to evaluate the usefulness or reliability of a source (see Appendix M9 for an example of a set of questions and sources on the Industrial Revolution from the DoE 2006 exemplar exam paper).

In all the other tests set by the three teachers similar trends are seen. In the March 2006 test set by the Enthabeni teacher learners are given a page photocopied from the textbook, with questions which require simply a recognition of the correct sentences, which can then be copied out word for word. The learner who was able to do both these tasks scored top marks.

9.6 Summarising the ‘how’ and the ‘what’

There was little change in Mrs Lawrence’s and Mrs Naidoo’s pedagogic practice between 2005 and 2006. There was also little change in the way that they presented and ordered the history knowledge. Mrs Lawrence showed a strong focus on developing both narrative and broad conceptual understanding in both years, and Mrs Naidoo showed an emphasis on specific detail and narrative in both years.

There was a difference between Mr Mkhize and Mrs Shandu’s pedagogic practice at Enthabeni, particularly regarding the evaluative rule. Mrs Shandu used a new textbook in 2006 which did impact on the way in which she structured knowledge in a

more conceptual way. However there is evidence to suggest that learners did not first have the foundation of a narrative understanding.

The cognitive demand of learners was highest at Lincoln, then at North Hill and lowest at Enthabeni. Lincoln was the only school where the teacher asked a significant number of higher order questions and where a significant number of learners asked instructional questions. The regulative discourse was such that questions were welcomed and affirmed.

There was a noticeable shift in the assessment practices between 2005 and 2006 at North Hill and Lincoln. While teachers at both these schools had used sources in 2005, they both followed the guidelines set out by the curriculum documents in 2006. The cognitive demand of the North Hill tests increased in 2006, while it decreased for Lincoln. Thus change appears to take place quite quickly (within a year) at the level of formal assessment, whereas there is very little change at the level of pedagogy, knowledge ordering and informal assessment.

9.7 Explaining the ‘how’ and the ‘what’

The findings regarding conceptual demand echo other research which show low levels of conceptual demand and low achievement in many South African schools (Fleisch, 2007; Hoadley, 2007; Reeves, 2005; N. Taylor, Muller, & Vinjevold, 2003), particularly in schools which tend to serve black African, and working class children³⁷. There have been a number of theories as to why this is the case, clearly the most obvious one is the continuing legacy of apartheid (Soudien, 2007). But what exactly is it about apartheid that makes the greatest difference? We know that South African schools continue to show differences in terms of infrastructure and learning resources, differences in the way that schools are managed, differences in teacher qualifications etc. But Taylor et al. (2003) argue that after socio-economic origin, pedagogic practices constitute the most important set of factors which structure the educational opportunity of children.

³⁷ These are generally schools previously administered by the House of Delegates, Department of Education and Training and homeland education departments.

This study has shown that working class children in Mr Mkhize's at Enthabeni in 2005 are exposed to pedagogy of weak evaluative framing and strong hierarchical rules which is exactly opposite to a preferred pedagogy which might better facilitate the acquisition of conceptual knowledge for all children. He also clearly lacks an understanding of the historical knowledge he is teaching. In 2006 in Mrs Shandu's class, the evaluative rule strengthens, and so does the framing of the hierarchical rule. Mrs Naidoo who is also teaching working class children shows strong hierarchical rules but a stronger evaluative rule.

What are the possible variables that might explain the differences in pedagogic practice? There are many, but I want to focus here on the two obvious ones: the teacher and the learners.

A key variable is the person of the teacher and his or her higher education experiences, teaching qualifications, experience, their beliefs about teaching and about learning history, all of which make up their professional identity. Johnston (1990) describes teachers' theoretical knowledge elements, their understanding of context and their personal beliefs and values of can and should be done, as their personal practical knowledge. Her study in Australia showed that although teachers were aware of the external forces, significant curriculum decisions were bound up with the personality and beliefs of the teacher. There is a growing literature that shows how teacher identity is key in the whole process of adapting and adopting curriculum changes (Jansen, 2001).

There are a number of South African studies that describe the policy image of the 'ideal' teacher. A study in KwaZulu-Natal schools showed that policy on teacher roles and competences constructs teachers as 'extended' professionals with well-developed reflexive competences, while many teachers in fact demonstrated a 'restricted' view of professionalism and were not highly skilled in the reflexive competences needed to implement OBE (Harley et al., 2000). Policy was out of step with teachers' professional identities as well as their cultural and personal identities.

Building on this study, Mattson and Harley (2003) show that the modernist, neo-liberal discourses of policy cannot simply be easily integrated into traditional contexts. Following Harley and Parker (1999), they use Durkheim's concepts of mechanical and organic solidarity as typologies of different forms of social cohesion in schools. Mechanical solidarity corresponds with more traditional contexts, and is founded on a simple division of labour and a common belief system. The more modernised organic solidarity emerges within a more complex division of labour where difference is accepted. With mechanical solidarity, law assumes a penal form. Within the greater complexity of organic solidarity, covenant must be replaced by contract, which binds individuals by a social contract spelt out in constitutions, bills of rights and legislation. South African policy favours an organic mode of solidarity. Mattson and Harley (2003) categorised the schools in their study and argue that the majority resemble a type which is neither functional in a traditional sense, nor is it aligned to policy. These schools exist somewhere between the mechanical and the organic. Teachers employ a number of strategies to cope with the contradictory tensions between policy and the reality of the contexts in which they teach.

Similarly, Baxen and Soudien (1999) argue that OBE creates a 'universal subject' and this vision has little concern with the reality of people's lived experiences.

The abiding concern of OBE has been that of producing a universal subject with universally good attributes. The nature of these attributes and their social history has not been addressed. Their locatedness, for example, in middle-class discourse and representations of the ideal learner is taken for granted as a universal good... The process of installing OBE thus talks past the ideological and cognitive tensions which permeate their [the learner] everyday lives. Instead the learner is constructed simply as an innocent subject of the shaping pedagogical gaze of OBE. Outcomes-based education is the transformative text which will move South Africans from a 'primitive' past into a 'modern' future (Baxen & Soudien, 1999, p. 139).

Muller (1998) argues that modern states contrive to rule by creating self-regulating subjects. South Africa is no exception where education policy documents aim to 'maximize the citizen/ learner's flexibility, opportunities, mobility and access'. Learners will become fully participating citizens in all spheres of life. Muller is interested in the nature of the pedagogy that is inscribed in OBE and how it constructs learners. The competence model of pedagogy adopted by South African policy

stresses regulative discourse, with its strong focus on values.

Deacon and Parker (1999) also argue that OBE and the NQF display a hybrid, but a hybrid of rationalism and behaviourism, resulting in a pragmatic approach. The pragmatic approach has one major problem:

It is this assumption that exposes the soft underbelly of pragmatism. To practice pragmatism, assumes that we are already in a pragmatic society. ... So too with the NQF: it tends to assume as already existing what it is intended to produce. A pragmatist approach to an outcomes-based curriculum assumes that learners will be disciplined and co-operative, and that teachers will be professional, knowledgeable and skilled (Deacon & Parker, 1999, p. 70).

In order for the History NCS to thrive and take root, the classroom teacher needs to have a strong knowledge of the substantive dimension of history that enables her to 'see' conceptual patterns, a weakening of intra-disciplinary boundaries, a personal teacher-learner relationship and a strong evaluative rule. These are all present in Mrs Lawrence's classroom *before* the advent of the new curriculum in 2006. Although Mrs Lawrence does not have an undergraduate major in history, she is clearly a person who is widely read, who is able to draw on a wide knowledge of current affairs and English literature in her classroom. None of the other teachers did this, but focused almost exclusively on the topic at hand. She has a clearly articulated sense of what she aims to do in her classroom, a strong 'sense of plausibility', which is a belief of how learning takes place and how teaching supports learning (Prabhu, 1990).

Mrs Naidoo and Mrs Shandu did not have as strong a sense of what they believe constituted good teaching and learning in their history classrooms. They also did not have as wide a general knowledge and the depth of history knowledge shown by Mrs Lawrence. However, most (at North Hill) and all (at Enthabeni) of their learners were learning in English as a second language, and the learners' language and reading competence severely compromised their ability to engage with texts.

The curriculum constructs the 'ideal' learner as self-regulating, curious, articulate, literate, reflexive as well as disciplined and co-operative. Again it is in the Lincoln classroom that these learners are more likely to be found because the policy discourse

is located in a middle-class discourse of the ideal learner, and the majority of these learners are middle-class. Most of the learners at Enthabeni, and many at North Hill would not have parents working in professional jobs and were learning in English rather than their mother tongue. Their backgrounds are probably not rich in reading and literacy practices, and the many were not able to easily understand English.

There have been many studies describing the difficulties that learners have learning in English when it is not their mother tongue. In rural areas English is seen as a foreign language rather than a second language as learners seldom hear it spoken at home, on television or on the radio. There are some who feel that code switching is a useful practice in classrooms where learners do not understand much English (Setati, Adler, Reed, & Bapoo, 2002). However, it does seem to be problematic at Grade 10 level if most of the teacher's input is offered in both English and Zulu. At Enthabeni, Mrs Shandu translated most of what she read from the English textbook into Zulu. Mr Mkhize only used English during the first two lessons I observed. It was only after I had interviewed some learners that I realised how weak their understanding of English was. After I explained to Mr Mkhize that he should teach as he usually does, he made use of Zulu a lot more in the lessons I subsequently observed. If nothing else, learners cover much less content as they are essentially covering it twice – once in English and once in Zulu.

Both Mrs Shandu and Mrs Naidoo felt that the demands of the new history curriculum were beyond the capabilities of their learners. Certainly from the learner productions when they reported back after group work tasks, I got the sense that many did not understand what the task demanded or were simply not able to realise those demands. It is in these two schools that teachers ask few higher order questions and learners ask almost no questions at all. One must wonder if this is because teachers know that learners will struggle to answer higher order questions. Do learners not achieve because teachers do not push them conceptually, or do teachers do not push the learners conceptually because they believe they cannot achieve?

Much has been made of the fact that the explicit criteria of OBE make the educational enterprise 'transparent' and open so that those with power cannot hide anything from

those with no power. However, this claim is false as Morrow (2000) and others have argued. Using the Norms and Standards for Educators policy as a case, Shalem and Slonimsky (1999) show that telling or giving criteria will not open access to the goods of the practice of 'good teaching'. It is only those who are already in the criteria who understand the criteria. Simply making the criteria explicit does not automatically mean that everyone will be able to reach them. It is clear that the outcomes of critical thinking, open debate and interrogation of texts are much more easily when both teachers and learners already 'have the criteria'.

9.8 Conclusion

This chapter has drawn comparisons between the pedagogic practice observed in the three history classrooms, a preferred pedagogy and the pedagogy required by the National Curriculum statement for history. What becomes clear is that the pedagogic practice observed in Mrs Lawrence's classroom is best aligned to both a preferred pedagogy and the new official pedagogy. Mrs Lawrence asks cognitively demanding questions, and learners engage in debates both with each other and the teacher. However this was not a function of the new curriculum, it is a function of good teaching which was observed before the introduction of the new curriculum. In the North Hill and Enthabeni classrooms, learners never asked questions of an instructional nature, and the teachers questions tended to require easily recalled answers.

The biggest changes noted between 2005 and 2006 were shifts in assessment. Ironically, this meant that the cognitive demand decreased for the Lincoln learners, but increased for the North Hill and Enthabeni learners. However, this shift did not necessarily lead to better learning.

Post-apartheid curriculum reform in South Africa set out explicitly to bring about social transformation and equality. This case study of reform in the FET history curriculum shows that the requirements of the curriculum graft most easily into a middle-class classroom and hardly take hold in a rural classroom. There is a strong

sense of curriculum policy falling into the trap of social meliorism, 'where commitment to a vision of *what should be* clouds the ability to seriously consider *what is*' (Mattson & Harley, 2003).

Chapter 10

Teachers' perceptions of implementing the new curriculum in 2006

Policies pose problems to their subjects.

Ball, 2005, p.17

10.1 Introduction

Chapters 8 and 9 have described in detail teachers' pedagogic practice in the history classroom. This chapter explores a different aspect of the field of reproduction, in that it describes teachers' perceptions of the new history curriculum. The chapter draws data from interviews with teachers about how they felt about the new curriculum and its impact in their classrooms in 2006 after they had been teaching it for three terms. These interviews describe their feelings and thoughts at a particular point in time. Each teacher had quite different perspectives, and while their views are obviously personal perspectives, they can also be linked loosely to the kind of schools in which they teach, the particular subject identity each has as a history teacher and the way in which apartheid education worked to create the identities of teachers.

10.2 The teachers speak

'I'm yet to be convinced that they are gaining anything from it' seems to sum up Mrs Lawrence's perspective. The way in which she speaks about the demands of the curriculum reflects that she sees it as very strongly externally framed; it is imposing a range of external constraints on the way in which she teaches and assesses. She uses

phrases like ‘we were told’ a number of times during the interview, as well as ‘we will do it strictly by the book’, ‘we’re toeing the line’. Overall there is a sense of resignation: ‘It sounds like it’s here to stay so you must just engage with it and try to make the best of it.’

For example, regarding the requirements for assessment, she says:

We do foresee doing it strictly by the book, it is going to be a incredible increase in the amount of preparation, and the pressure is on to get to know the kids extremely well...because you have to get to know the child’s ability and to be able to rank 27 individuals according to different criteria...it’s going to be exhausting but we will get there and we will do it.

There is a tension between what she perceives she and her colleague *should be* doing in order to fulfill the curriculum requirements, and her own sense of professional judgement.

I know that we do more teacher talk that we should be at the moment, but we just feel that uhm, they [the curriculum documents] often presuppose a general knowledge that kids don’t have.

She suggests a certain sense of powerlessness. In terms of the teaching, she feels frustrated by the fact that there is no longer a differentiation between higher grade and standard grade, and frustrated by the disappearance of the discursive essay.

Particularly she felt frustrated by the Department of Education promises of support, which were not fulfilled, and a sense that it was pretty much up to teachers to make sense of the curriculum. She felt frustrated that at Lincoln they were trying to ‘toe the line’ but that other schools were not doing so. She felt that the training they were summoned to and attended ‘grudgingly’ in the 2006 July holidays was really not useful, that they were given nothing new.

She feels that the new curriculum supports a superficial coverage of content. She feels that the supplementary notes she and her colleague used in 2005 were more detailed than the textbook, which they now use in order to cover the new content. In terms of assessment she says that the new assessment has probably ‘raised the standard in terms of the bottom end of the scale, somehow the test didn’t really lend itself to the

top candidates to really stretch themselves.’ In their 2006 June exam, she describes the situation where the top learners felt that they needed to cram an empathy question with facts, they felt that there must be more and ‘in fact they didn’t write as empathetic response as perhaps a less able kid would do, who is looking at it at face value, putting in the tears and the empathy and the emotion without getting bogged down in the details and facts’. The recognition and realization rules have changed: what counts as the legitimate text is no longer the same. And ironically it is the top learners who don’t yet see (or perhaps can’t quite believe) what the new legitimate text is.

Mrs Lawrence mourns the loss of the discursive essay. She says ‘the complete disregard of any of those discursive skills is such a frustration to me.’ Although the curriculum claims to teach children to think critically, she feels that its ‘butterfly’ approach and the approach of the textbooks leads to too much discussion on quite superficial issues and not enough detail. She says that in 2005 her learners covered the Industrial Revolution in three times as much detail as the new curriculum allows.

The fourth learning outcome in the FET history curriculum is about heritage. At the provincial training in October 2005, teachers were told that this would be covered by a so-called heritage assignment, and that they would receive detailed support from the Education Department regarding this assignment. However none was forthcoming, and Mrs Lawrence said she and her colleague just interpreted it as they understood it and gave learners a couple of suggested topics like a family tree or the changing of the street names. Her concern with this project was that it did not require proper researching or having a bibliography, footnotes, appendix, ‘the skills that we would normally teach’.

She feels that the new curriculum is less than what the history department at Lincoln has offered in the past. She says that

...we have for many years sold our subject along the lines that history teaches you to think, uhm, and, and prepares you for tertiary studies through skills like, uhm uhm discursive essay writing, proper researching...digging around in issues, uhm, which leads onto an inherent ability to discursively analyse an issue.

She shows her own deep understanding of the purpose of teaching history and is suggesting that the new curriculum is at odds with her own understanding. She feels that depth and detail are key for developing critical thinking.

I still feel that when we are engaging with something and assimilate it and are expected to know it in quite a lot of depth and detail, it's engaging the brain, it stimulates the mind, critical thinking...But I'm yet to be convinced that they [learners] are gaining anything from it [the new curriculum], perhaps I'll be a convert a few years down the line, but I have my doubts at the moment and certainly, uhm work ethic has suffered...

The new curriculum stresses that the content of a section should revolve around a key question, such as 'What were the lives of the working class like during the Industrial Revolution?' Mrs. Lawrence says that in terms of assessment, they have designed tests where the sources are structured around the key questions, but are not using these key questions to structure their teaching. 'I know we should be, but we aren't yet planning around those key questions.' She says she finds it an artificial constraint that is quite limiting and that the way a textbook writer might interpret the key question might be different to the emphasis she would like to take.

Her response to the new curriculum seems very much informed by her professional identity and confidence as a history teacher. She is confident and clear about what she wants to achieve in the history classroom and articulate about how the new approach focuses on breadth rather depth. She doesn't feel real critical thinking can be achieved without detail and depth. In terms of change in practice, it is assessment that has changed most noticeably in 2006. Although Mrs. Lawrence is not in support of the extended piece of writing as opposed to the discursive essay, she has to include it in her tests. Assessment is strongly externally framed and is open to surveillance by the department in ways that teaching is not.

Mrs Naidoo's response to the curriculum is quite different: 'The curriculum is good. But it requires a lot of support'. She was generally positive about the new curriculum but did talk a lot about how much time it had required in terms of preparation. The two main themes that emerged from her interview were the importance and value of

working very closely with teachers from the cluster of schools and the type of learners who were in her class.

She talked a lot about the work that the group of teachers from the cluster of schools had done together. This group had taken very seriously the requirements of the curriculum, both in the planning of the lessons and the assessment. Each teacher took one of the key themes (for example, the quest for liberty, transformation, slavery etc) and produced a set of lessons and resources for the other teachers to use in their classrooms. The lessons had to consist of a key question, a range of sources and questions and a clear sense of which outcomes were being met. Teachers used a range of textbooks to find suitable sources.

The experience of working with a group of teachers was a very positive experience for Mrs. Naidoo. She that there was minimal support from the Department of Education and thus the cluster was vital.

If we didn't have this cluster, we would be in real difficulty. You find that the material needs to be prepared on this whole section was quite intense, in covering all those outcomes and all those key questions and the key questions have got to tie up with the sources...So if we didn't form our own cluster and work with it we would be, really, we wouldn't have gone this far now in terms of implementing the curriculum.

The Head of Department at her school is on the committee who sets the national paper, so they were supplied with a copy of the exemplar paper and some guidelines on setting the questions. The cluster also worked very closely on planning the testing programme and the different papers. They looked at a range of exemplar papers and then worked together on a common paper. It was very clear that Mrs. Naidoo knew the requirements for assessment.

In terms of the challenges of the curriculum the first issue raised by Mrs. Naidoo was the 'type of learners that are coming to grade 10'. She says that the testing in the OBE system has been very loose and informal and so learners come to Grade 10 without any interpretation or analyzing skills, as well as having problems of expressing themselves in English.

The learners are supposed to be reading, analyzing and interpreting the

sources. But many of them don't have the skills, coming to Grade 10.

She felt that learners struggle with reading and interpreting the sources as the sources tend to be long and the learners often do not understand the vocabulary used in the sources.

It's above the level of the learner, so lots of effort is put into getting them to understand and interpret sources.

Mrs. Naidoo framed the changes that the new curriculum had brought about in a positive light. She felt that the extended piece of writing that had replaced the essay was a good thing and that the new format of testing was beneficial for learners. It meant that they no longer had to 'go and learn an essay' and were able to 'score' with the more open questions based on the source material.

She felt that it is a good thing that the curriculum is focusing on building the skills of reading and interpreting, and that there has been a shift from regurgitation to reading and analyzing. She felt that the curriculum has good intentions but the 'problem is the kind of learners that we have make it difficult to work with'. She feels that the new curriculum helps learners to actually relate to what is being taught. For example with the Industrial Revolution, they should see how the transformation affects them and changes their lives. This should lead them to want to know more about technology, and advancements. She felt that learners were more interested: 'they now want to learn more about, and err, they look at history differently, they want to learn more about how history has changed the country that they live in, where they are presently.'

Overall she felt that 'it has a better chance than the old curriculum. Because it is more, umm, structured, its more in a sense of uh, the learners are developing skills rather than the rote learning'. She said that in the past they had rote learnt the material but 'now there was no notes, just work through the sources, key question, the questions based on it and the reflective piece of writing. You find that learners with a little bit of foundation, they were able to achieve that outcome.'

Mrs. Shandu said that her understanding of the new curriculum was limited because she had only attended two days of training in 2006. Her understanding was that the

new curriculum requires learners 'to be more active'. She framed the differences in terms of progressive pedagogy, and did not mention changes in content or assessment.

Its different, ja, its different. They are supposed, in fact I am supposed to guide them and facilitate whatever they are doing, although I must give them something in order for them to understand what the whole thing is about, and leave them. But then they have to come in and add certain things to enrich the lesson, they have to go and research. But the problem is most people out here are very poor, they can't get to the library.

Mrs. Shandu was following the new curriculum by teaching according to the new textbook. Her assessment tasks had not changed to comply with the regulations of the new assessment guidelines. She had not engaged with the key changes and so could make no comment on these. She felt that she was doing the best she could.

You might not be doing it exactly the way that they require it to be done, but you are doing it at least...I really never went [to the five day training]. So I just try and make ends meet with whatever I've got.

Although she had not attended the provincial training, I did not get a sense that she had tried to get additional information by reading the NCS document herself or speaking to other history teachers. She said she had mixed feeling towards the new curriculum, because the preparation and training have been minimal, but that the new syllabus is good, as it encourages critical thinking. She feels that the new curriculum is trying to integrate history with other subjects, and requires learners to do their own research and to form their own opinions.

10.3 An historical gaze

I have argued earlier that an historical gaze is about gaining mastery over both history content and mode of expression. In history the mode of expression is both about the specialist way in which history uses the language of time, chronology and explanations of cause and effect, as well as the specialised procedures historians use to interrogate primary sources. They do this through an understanding that people in the past thought and behaved differently to what we do, respecting the context and the setting of the subject of enquiry and recognising the relationship between events over time as historical process (Tosh, 2006). Implicit in this description, I argue, is a foundational, deep knowledge of the particular historical context being studied.

Of the three teachers, I argue that Mrs Lawrence has the strongest mastery over both history content and mode of expression and she has a strong sense of how to develop these traits in her learners. The interviews show that Mrs. Lawrence views the curriculum as an imposition that in fact means she cannot teach in the depth and detail that she has always taught. She feels that she has always taught for critical understanding and conceptual depth and that the new curriculum means she is unable to do this as thoroughly as she had previously done. She feels that the new curriculum does not stretch 'able' learners now that the discursive essay has gone. She has shown that she has a strong historical gaze, being firmly grounded in both the substantive and procedural dimensions of history. It is from this gaze that she judges the new curriculum as having a weak substantive dimension and as offering less than she has offered in the past. Mrs Lawrence has both a strong identity as a history teacher and as a professional teacher, and it is these identities that allow her to evaluate the new curriculum.

Mrs. Naidoo feels that the new curriculum expects *more* of her learners now that they have to understand and interpret sources. She appears to understand the substantive and procedural elements of history as separate, showing that perhaps she herself does not have a strong historical gaze. She mentions often that learners don't have the skills they need, but never that they do not have the knowledge. She has 'bought into' the assumptions of the curriculum reform in South Africa, that skills are separate from and more important than knowledge, because knowledge is equated to rote learning. Of the three teachers, she is most familiar with the OBE curriculum changes at the GET level, as she was 'OBE trained' at college and has been responsible for implementing OBE at her school. She has fully embraced the curriculum's vision of teacher collaboration in planning. Her identity is more as an OBE teacher than as a history teacher, and it is this identity that fully embraces the intentions curriculum, while recognising that it is not easy for the learners in her class to manage its demands.

Mrs. Shandu did not have a detailed sense of the key changes as she felt that she was very under-prepared to teach the new curriculum. She felt the new curriculum was

'good' but her engagement with it was limited to using a new textbook for teaching. She also does not show a deep understanding of the inter-connectedness of the content and procedures of history. She understands the purpose of school history as developing learners who can think critically, express their opinions backed up by facts and who read widely. She does seem to have a strong identity as a history teacher, as she gets angry that the perception of other learners is that it is a 'useless' subject that is just about the past. However, she did not have a clear enough understanding of the new history curriculum to comment as to whether it would support this purpose.

10.4 Conclusion

After teaching the new curriculum for a year, the three teachers had very different perceptions. It is only Mrs Lawrence who was critical of the curriculum itself, believing that it allows a too superficial engagement with the content. She feels that the new curriculum does not allow her to teach for critical understanding and conceptual depth as she has always done. Mrs Naidoo is fully supportive of the intentions of the curriculum, and is critical more of the lack of support from the provincial department. She is aware that her learners lack the skills to fully engage at the level required by the new curriculum. Mrs Shandu did not have a clear picture of the requirements of the new curriculum, and was embracing its requirements by teaching with a new textbook. All three teachers were agreed that they did not receive sufficient support from the department of education to assist them in implementing the new curriculum in 2006.

Chapter 11

Conclusion

11.1 Introduction

The overall purpose of the study was to track the creation, recontextualisation and acquisition of the new FET history curriculum in selected classrooms, using the theoretical resources provided by Bernstein's concepts of the pedagogic device, pedagogic discourse, pedagogic practice and vertical and horizontal knowledge structures. The overall research question informing the study is:

How is history knowledge recontextualised into pedagogic communication?

The study used Bernstein's pedagogic device both as a literary ordering device and as a theoretical framework. This final chapter summarises the key findings from the study and relates these to the research questions posed by the study. It also discusses the methodological process of using Bernstein's concept of the pedagogic device to describe the process of curriculum recontextualisation.

11.2 Key findings at the levels of the pedagogic device

11.2.1 Field of production

The key question here is the extent to which the recontextualising fields draw on the logics inherent in the field of production to select that which becomes 'school history'. Using physics as an example, Bernstein argued that the selections from the field of production 'cannot be derived from the logic of the discourse of physics' (1996, p. 49). However, both Muller (2007) and Dowling (2007) have argued that the

logic of the discourse must have some influence on its recontextualised form. The study was interested in the extent that the history curriculum was drawn from the logic of the discourse of history.

An epistemological shift took place within the discipline of history in the twentieth century, from a positivist belief that it is possible to know the past as it was, to an idealist perspective that makes explicit the subjective role of the historian in interpreting evidence. A further shift took place when post-modernism began emphasising the deconstruction of discourse and the text. While many historians welcomed the greater sophistication in interpreting texts, few are able to completely embrace history simply as a multiple of narratives (Tosh, 2006). A similar shift has taken place in school history (though not to the extent of embracing the postmodern), although the extent of this shift differs from country to country. History is generally understood as a subject which can be used to develop particular kinds of citizens and particular kinds of nationalisms. In this sense, selections from the field of production are also influenced by the political needs of a particular state at a particular time.

From the perspective of sociology of knowledge, Bernstein suggests that history could be described as a horizontal knowledge structure within a vertical discourse. This means that its content does not have a strict vertical progression, but is characterised by a proliferation of different languages, or in the case of history, of different historiographies. Its specialisation then comes from the procedures or thinking that differentiate it from other disciplines. The procedural work of historians is to interrogate primary evidence in rigorous ways and to make a case based on that evidence (Leinhardt, 1994). Historians would understand their procedural work of interrogating evidence as being underpinned by a depth of substantive historical knowledge.

While there is not a strict vertical progression of content within the discipline of history, this does not mean that history does not have a substantive body of knowledge that defines it. Both the substantive knowledge and the procedural knowledge work together to create a person with an historical gaze. Within school history there is a tension between how much to focus on the substantive, knowledge

dimension and how much to focus on the procedural dimension.

11.2.2 Official Recontextualising Field

It is in the recontextualising field that the recontextualising rules regulate the world of specialists who construct the ‘what’ and ‘how’ of pedagogic discourse (Bernstein, 2000). The study was interested in the ways in which the specialists in the Official Recontextualising Field (ORF) and the Pedagogic Recontextualising Field (PRF) work to create a pedagogic discourse for history.

A history of the development of the history curriculum in South Africa shows that in the 1980s and early 1990s there was much work being written by those who would call themselves the ‘Left’, critiquing the apartheid history curriculum which was accused of being biased towards Afrikaner nationalism, Eurocentric and content-heavy. History was seen as a key part of the ideological apparatus of apartheid (Chisholm, 1981; Dean et al., 1983). Much of this critique disappeared, as outcomes became the new scripture from the mid- 1990s. History itself also disappeared into a learning area called Human and Social Sciences in the original version of C2005, which had no content at all. Content reappeared, as did history, in the revised National Curriculum Statements. Although content is listed in the FET curriculum statements, I’d argue that outcomes and assessment standards are stronger.

The subject writing group who wrote the FET curriculum had to work with strongly framed guidelines in terms of organizing the curriculum around outcomes and assessment standards at the level of the general instructional discourse. At the level of the general regulative discourse, there were strong guidelines in terms of the Constitution.

The process was strongly informed by the Minister of Education, Prof. Kader Asmal who took a personal interest in history as a school subject. Inevitably there were tensions that arose within the writing group. Initially these were around a fundamental understanding of the study of history – as a science or as an ideologically-informed interpretation of events. There were also tensions around content. Although the

group was in agreement about the focus of South Africa in Africa in the world, one of the participants felt that there was not sufficient focus on South Africa. There was a sense that power was unevenly distributed in the group, which is unsurprising. Certain members had greater power to make decisions at certain times. Overall the writing group agreed that they were proud of the curriculum which they had produced, but recognized that it would not necessarily be easy for teachers to work with in their classrooms. The work of creating a curriculum is completely separate from the work of implementing it in classrooms.

The curriculum represents the official state view within the official recontextualising field. Using the concepts of framing, classification and instructional and regulative discourses, a document analysis shows key shifts from the 1995 Interim Core Syllabus and the National Curriculum Statement. In terms of knowledge (or the substantive dimension), the NCS presents knowledge in a more integrated way than the ICS and that knowledge is framed using key questions. The knowledge is structured using key historical themes such as power alignments, human rights, issues of civil society and globalisation. There is a move away from a Eurocentric position to a focus on Africa in the world.

The new curriculum clearly understands the role of history as developing Constitutional values. In terms of pedagogy there is a shift from a theory of instruction focused on the teacher to one more focused on the learner. There is a strong emphasis in the NCS on developing the historical skills of enquiry (the procedural dimension). Assessment standards show that there is a strong emphasis on conceptual rather than factual knowledge, with an emphasis on the cognitive skills of understanding and analysing. However, the Subject Assessment Guidelines show that formal assessment gives greater weighting to the procedural than to the substantive dimension.

11.2.3 Pedagogic Recontextualising Field

The curriculum and accompanying documents describe the state's official pedagogic discourse. This official message is again recontextualised by agents in the PRF, who

are usually trainers of teachers, writers of textbooks etc. The ideological pedagogic positions in the Official and Pedagogic Recontextualising Field may well be opposed to each other, thus the ‘relative independence of the latter from the former is a matter of some importance’ (Bernstein, 2000, p. 115).

The teacher training workshop that I observed was run by a provincial subject advisor, so there would be strong links to the ORF. The workshop took place over four days, where three days focused only on the history curriculum. About a third of the time was taken up by strongly framed Power Point Presentations, a further third was teachers doing particular planning or assessment tasks and the final third was taken up by report-backs and feedback on these tasks. The facilitator was strongly in favour of the new enquiry-based approach to history, but was somewhat critical of the assessment procedures that he thought were centralised and rigid, rather than flexible. Teachers were given an opportunity to practically design learning activities based on the ‘history- as- enquiry’ cycle. However, it became very clear that many struggled to develop historically meaningful questions based on the sources that were chosen. It is not clear if this is because they had never done this before, or because they lacked the depth of knowledge necessary to create meaningful source-based activities.

The facilitator’s feedback on this task was very technically oriented towards ‘covering’ the learning outcomes and assessment standards. Although he sometimes said that it was important to plan from the content, the stronger message was that planning starts from the outcomes and the assessment standards, and the job of the teacher is to ensure that these are met. Since these do not specify content, it appears that the procedural dimension ‘trumps’ the substantive dimension. We see a very strong procedural dimension, while the vital substantive dimension is assumed (falsely). Overall the workshop focused on the practical issues of pedagogy and assessment, and issues of values and knowledge were mentioned only very briefly.

At another level of the PRF, the textbook writers and publishers operate with a different logic to the provincial education official. They interpret the National Curriculum Statements in ways that will ensure that the textbook produced will be

accepted by the provincial education department evaluation teams.³⁸ The logic that governs their practice is different from the logic that governs the practice of a provincial workshop facilitator. If the education department does not accept a particular book, the book cannot be marketed in that province. As profit-making organisations, it is vital that their books sell. Thus their work is strongly externally regulated by the departmental guidelines.

These guidelines are most concerned that the textbooks cover the stipulated learning outcomes and assessment statements, rather than being concerned with the ideological bent of the content. In the days of apartheid the Afrikaner nationalism ideology of history textbooks was heavily criticised; now ideology doesn't seem to matter, although of course the curriculum is still ideologically driven. What matters is that textbooks cover all the 'content and context' as listed in the NCS and that they make the learning outcomes and assessment standards explicit. Again it becomes clear that the procedural dimension is paramount in the textbook writing aspect of the PRF, and that the focus on skills and outcomes overshadows the substantive dimension of content and knowledge.

11.2.4 Field of reproduction

The study observed three Grade 10 history teachers in 2005 and again in 2006, the year in which the new curriculum was implemented. In Enthabeni, the Grade 10 teacher in 2005 did not teach Grade 10 in 2006, thus no pedagogic comparisons can be made across the two years in terms of the new curriculum. But it was clear that Mrs Shandu, (the Enthabeni teacher in 2006) had a more interpretive and critical understanding of the purpose of teaching history than Mr Mkhize (who taught at Enthabeni in 2005), who understood history purely as a body of knowledge to be memorised.

At Lincoln and North Hill it is possible to say that pedagogic practice did not shift when the new curriculum was implemented. In both years, Mrs Naidoo showed a

³⁸ It was only the Grade 10 textbooks that were submitted to provincial evaluation teams. Textbook evaluation is now done centrally at a national level.

hierarchical rule based on positional control, strongly framed evaluation and strong classification at all levels. Mrs Lawrence showed a weaker hierarchical rule, more strongly framed evaluation and weak classification at the intra-disciplinary level. There was also little change in the way that the teachers presented and ordered the history knowledge. Mrs Lawrence showed a strong focus on developing both narrative and broad conceptual understanding in both years, and Mrs Naidoo showed an emphasis on specific detail and narrative as well as a lot of group work around reading texts in both years.

In both 2005 and 2006, the cognitive demand of learners was highest at Lincoln, then at North Hill and lowest at Enthabeni. Lincoln was the only school where the teacher asked a significant number of higher order questions and where a significant number of learners asked instructional questions. The regulative discourse was such that questions were welcomed and affirmed.

While pedagogic practice did not shift, there was a noticeable shift in the assessment practices between 2005 and 2006 at North Hill and Lincoln. While teachers at both these schools had used sources in 2005, they both followed the guidelines set out by the curriculum documents in 2006. The cognitive demand of the North Hill tests increased in 2006, while it decreased for Lincoln. Thus change appears to take place quite quickly (within a year) at the level of formal assessment, whereas there is very little change at the level of pedagogy, knowledge ordering and informal assessment. At Enthabeni, Mrs Shandu seemed unaware of much of the requirements of the new curriculum. Her tests did not meet the source-based requirements of the official documents, but her learners did write the DoE exemplar exam paper at the end of the year.

Bloom's Revised Taxonomy was used to analyse the cognitive and knowledge demands of test questions across the three schools. Not much changes at Enthabeni in 2006, where the marks of one test are still all testing recall of factual knowledge but in the second test, 20% of marks are testing understanding of conceptual knowledge. At North Hill, in 2006 there are fewer questions which test the recall of factual knowledge and a greater spread of questions in the categories of understand factual

knowledge and recall and understand conceptual knowledge. At Lincoln, there is ironically less of a spread of questions across the conceptual and knowledge dimensions than there was in 2005.

An analysis of the way in which sources are used in tests shows that the majority of questions require learners to respond to the sources as a comprehension exercise. Thus even though the tests *look like* they are source-based and thus have the procedural dimension of history, in fact they do not. But they also have little focus on the substantive knowledge dimension of history. So whatever learners are doing in their history tests, it does not appear that they are *doing* history, but neither do they need to *know* much history. The tests take on the *form* of source-based enquiry, but do not show the substance of it.

11.3 Tracking the message

I have argued that history as a discipline has both a substantive knowledge dimension and a procedural dimension. An historical gaze requires both of these dimensions. Historians have both a depth of conceptual knowledge and a particular method of interrogating sources, asking questions, locating sources within their particular time and context and using evidence to build up a particular case or argument. As I track the message through the pedagogic device, it becomes clear that the procedural dimension begins to take precedence over the knowledge dimension.

Appendix M documents a set of material artefacts from each level of the pedagogic device. Obviously each artefact represents only a small exemplar of the greater whole, but is included here as a textual representation of how the message recontextualises. The following figure describes the artefacts and how they are related to the levels of the pedagogic device.

Figure 26: Levels of the pedagogic device and textual artefacts (see Appendix M)

(Form of regulation) Field of practice	Processes	Kinds of symbolic structure	Material artefact
<i>(Distributive rules)</i> Production of discourse	Production of legitimate knowledge/discourse	Knowledge structure	
<i>(Recontextualising rules)</i> Official recontextualising field (ORF)	History knowledge is recontextualised into a formal history curriculum for schools.	Curriculum	Definition and purpose of history from the NCS. Example of how to develop source-based questions (SAG). Ways to achieve history learning outcomes (LPG).
Pedagogic recontextualising field (PRF)	The history curriculum is recontextualised in teacher training workshops, and by textbook writers.		An extract from the manual given to teachers at the training workshop. An extract from <i>In Search of History Grade 10</i> (Oxford University Press).
<i>(Evaluative rules)</i> Field of Reproduction	Teachers recontextualise the curriculum in their classrooms in terms of pedagogic and assessment practice	Pedagogy and evaluation	Examples of worksheets used in North Hill and Lincoln in 2006. Extract from the textbook used at Enthabeni in 2006. Question on Industrial Revolution from the KZN DoE exemplar paper November 2006. Exemplar of learners' responses to the test question.

Underpinned as they are by outcomes based education, the FET curriculum documents place a strong emphasis on the procedural dimension of history, but I don't think it was ever the intention to diminish the substantive knowledge dimension. Indeed, the Learning Programme Guidelines (Department of Education, 2005) state that 'content is important as the context for the achievement of the Learning Outcomes and Assessment Standards in History' (p. 15). However, when planning, teachers are instructed that they must begin with the Learning Outcomes and

Assessment Standards, and only after this do they consider the ‘content and context’ (p. 24). Thus, the logic of outcomes-based education shows itself to be overwhelming.

In the provincial training the major focus is on getting teachers to plan enquiry-based activities which ‘cover’ the assessment standards and the learning outcomes. Issues of values and of a different approach to ordering knowledge are merely mentioned, while the major focus is on the outcomes and procedures.

The Departmental guidelines for textbook writers also emphasise the coverage of outcomes and assessment standards, while content is hardly mentioned in the guidelines. Since textbook publishers are heavily reliant on the sales of their books in schools, it is of paramount importance that their books make the departmental approved list. Thus many textbooks too show a strong focus on the procedural dimensions of history, in some cases to the detriment of the knowledge base. In the worst case scenario textbooks are a series of learner activities with lots of source material and the occasional chunks of content.

The message shifts and changes again as it plays out in different classrooms in different schools, depending on each teacher’s own historical gaze and professional identity, the organisational culture and resource-base of the school and on the literacy and language competence of the learners. While teachers have control over their classroom pedagogy, their assessment practices are strongly externally regulated. The official documents make it clear that assessment must be based on the ‘history-as-enquiry’ cycle and must contain a number of sources.

A teacher like Mrs Lawrence may hold onto the substantive knowledge dimension in her teaching, but her assessment must be in line with the official departmental requirements. Mrs Lawrence’s understanding of the new Grade 10 curriculum is that it does not allow for learners to develop depth of knowledge in one area but has a ‘butterfly’ approach. She feels that it does not allow her to teach history as she has always done, that is developing learners’ conceptual knowledge into a coherent narrative. Her critique of the curriculum is ironic in the sense that her pedagogic

practice most closely matches the ideal of the new curriculum. Her own depth of history knowledge and her ability to work conceptually within the discipline make her the 'ideal' teacher, and her learners who are willing and able to articulate questions are the 'ideal' learners.

Both Mrs Naidoo and Mrs Shandu thought the new curriculum was good, but that it was beyond what their learners could cope with. Mrs Naidoo likes the focus on skills which she understands as separate from knowledge. Her pedagogic practice embraces the curriculum's focus on the procedural dimension of doing history and gives learners many tasks to do in groups, but because learners' procedural and conceptual knowledge is weak she often re-teaches these sections again to ensure some coherence. At Enthabeni in 2006 Mrs Shandu teaches from a new textbook and appropriates a few activities from the textbook and also gives learners opportunities to work on particular activities. However the learner feedback from these tasks is usually verbatim from the textbook showing a misunderstanding or lack of understanding of the key concepts.

It becomes clear that the outcomes that the curriculum promotes such as raising questions about the past, using a range of enquiry skills, demonstrating an understanding of key historical concepts are most easily reached in classrooms where learners are disciplined, self-regulating, literate, confident and articulate and teachers have a historical gaze (that is, they have a grounding in both the substantive knowledge dimensions and the procedural dimension of history). The history curriculum tends to assume as already existing what it is intended to produce (Deacon & Parker, 1999). This is ironically why it is not able to bring about the social justice and transformation it aims to create.

It appears that the FET history curriculum is in danger of losing its substantive knowledge dimension as the procedural dimension, buoyed up by the overwhelming logic of outcomes-based education and the strongly externally framed Departmental assessment regulations, becomes paramount. History curriculum reformers have embraced the procedural dimension of 'doing history' as an antidote to the rote learning of facts that often masqueraded as history in the past. The aim of this focus

on enquiry skills was to develop critical thinking and an awareness of how history is biased and ideologically-informed, rather than an irrefutable ‘truth’, which is how Afrikaner nationalism was presented during apartheid. These enquiry skills dovetailed beautifully with outcomes-based education which was already strongly entrenched.

The tensions inherent in South Africa’s outcomes-based reform path have been well documented. Harley and Parker (1999) suggest that the National Qualifications Framework is attempting to combine a competence approach where assessment is ‘rooted in the ultimate inscrutability or non-observability of learning, making assessment reliant on the professional judgement of the assessor(s)’ (p. 183), and an outcomes-based approach which emphasises the observation and measurement of performance. Kraak has described the tension as ‘a learning methodology which is simultaneously radical in discursive practice but behaviouralist in assessment technology’ (1999, p. 38). This study shows that in the case of FET history, it is the assessment technology that has triumphed.³⁹

For Bernstein, evaluation condenses the meaning of the whole pedagogic device. This is even more so when the curriculum is outcomes-based. The assessment tasks that Grade 10 learners in this study were required to do had the appearance of being source-based, but they seldom required learners to think like historians, nor did they require them to have a substantial and a coherent knowledge base. Thus these learners were not ‘doing history’ as it is not possible to ‘do history’ in this enquiry-based way without a deep substantive and conceptually-based knowledge of a particular time and place. So while the FET curriculum states that ‘learners who study history use the insights and skills of historians’ (p. 10), these learners were not doing so. Doing history without knowing history becomes empty; it becomes something that is no longer history. An historical gaze can only be developed through both the knowing and the doing. And learners will not develop this historical gaze until their teachers have developed the same.

³⁹ Some indication of the importance of assessment is seen in the fact that 60% (37 pages) of the NCS history document covers assessment, learning outcomes and assessment standards. In addition there is a 37 page document called the Subject Assessment Guidelines for History (Department of Education, 2007) which gives great detail on daily assessment, programmes for assessment in Grades 10, 11 and 12, guidelines for setting question papers and criteria for assessment.

11.4 Methodological issues

The methodological question is: How does the concept of Bernstein's pedagogic device assist in describing the recontextualising of the history curriculum?

Bernstein (1996, 2000) offers an internal language of description which enables one to track the recontextualising of the pedagogic discourse across the pedagogic device, from the discipline of history to the making of a the school curriculum to the recontextualising of the curriculum by teacher trainers and textbook writers, to the pedagogic practice of teachers in their classrooms. Bernstein understands pedagogic discourse as a grammar which underlies the fields of production, recontextualising and pedagogic practice. But the pedagogic device is not simply a set of neutral arenas where recontextualising takes place, it is

a symbolic ruler, ruling consciousness, in the sense of having power over it, and ruling, in the sense of measuring the legitimacy of the realisations of consciousness. The questions become whose ruler, what consciousness? In this way there is always a struggle between social groups for the ownership of the device. Those who own the device own the means of perpetuating their power through discursive means and establishing, or attempting to establish, their own ideological representations (Bernstein, 2000, p. 114).

Drawing on the work of other researchers (Hoadley, 2005; Morais & Neves, 2001; Morais et al., 2004; Morais et al., 1999), it was possible to develop an external language of description that operationalised the key concepts of classification and framing so that they would be able to read both the curriculum documents and the classroom data. It was very useful to use the same language of description, as the purpose was to track how the message of pedagogic discourse shifted in its journey to the classroom. However it was in the analysis of the classroom data that it became clear what Bernstein's language was unable to do.

Bernstein's work is focused on understanding the actual relay of pedagogic discourse and not on the substance of what is relayed. A pedagogic discourse analysis of the classroom data showed that classification and framing did not distinguish adequately the quality of these relationships. Bernstein's language is descriptive not evaluative. This is useful in that he describes pedagogic transmission in a way that breaks it down

into its essential parts. But description was not sufficient to adequately capture the substantial differences in the quality of the teaching and learning in the classrooms. classification and framing. One of the areas of difference appeared to be that of cognitive demand. With regard to assessment, for example, Bernstein is concerned with how explicit the evaluative criteria are, and not with the cognitive demand of these criteria.

Bloom's Revised Taxonomy was able to provide clear criteria for recognising qualitatively different levels of cognitive demand and knowledge complexity within the classroom and assessment task. However, Bloom is a generic tool designed for working with a range of different levels of education and across a range of subjects. It was useful up to a point, but was not able to penetrate the specificity of history, particularly in differentiating between skills or procedures and knowledge. As the study progressed it became clear that issues around the structure of school history knowledge were becoming increasingly key.

11.5 Limitations of the study

The purpose of the study was to track the history curriculum message as it shifted across the fields of the pedagogic device. Thus it was an ambitious project which inevitably meant that some things were left undone. Data were collected from a range of different participants at different levels of the pedagogic device. It was not possible to interrogate all the sets of data with the same level of detail. A key issue was knowing which tools to use at which levels. As one moves up and down and pedagogic device, certain things come into focus, while other things move out of focus.

This inquiry is an instrumental case study, because the recontextualisation of the history curriculum is not of intrinsic interest in itself but is of interest because of the theoretical and methodological understanding and insight this particular case can generate about curriculum recontextualization in a particular context. Obviously generalising from a case needs to be done with caution, but it appears that a 'fuzzy generalisation' (Bassey, 1999) can be made about the South African FET curriculum

reform process where skills and outcomes are taking precedence over knowledge. It would be interesting to see if the trends seen in the case of history are also seen in other school subjects, bearing in mind that history is a horizontally structured discipline, which finds its specialisation in procedures. It may be that these trends work out differently for vertically structured disciplines.

Unlike mathematics education, which has a rich research base in the sociology of education, research in history education has mostly been located within a cognitive domain (Leinhardt, Beck, & Stainton, 1994). Thus there was no previous history research from a sociological perspective to build on. As the study progressed it became clear that Bernstein's work gave access to a generic pedagogic discourse which was in fact not sufficiently nuanced to describe a particular *history* pedagogic discourse. It also became clear that the knowledge dimension is absolutely key, particularly the interface between substantive knowledge and procedural knowledge. Bernstein only began to interrogate issues of knowledge towards the end of his life and did not move beyond the vertical/ horizontal structure description.

The problem of how to describe the actual content of what is classified is not a new one. Hoadley (2005) made use of Dowling's (1998) concepts of domains and strategies to provide the semantic content of what is classified. I initially did not turn to Dowling as his work is in mathematics, and felt that Bloom would be a sufficient tool. However, at the end of the study it became clearer that Dowling's concepts of domains are useful in describing the speciality of history from a content perspective (the signified/ substantive dimension) and in terms of mode of expression (the signifier/ procedural dimension). It was beyond the scope of this study to work with Dowling in a very detailed way, but there certainly seems to be space for a fruitful engagement with his domains and how these might map onto the speciality of history.

The work of systemic functional linguists (Coffin, 2006a; Martin, 2007) in the discipline of history also points to very fruitful ways of engaging with both textual and classroom data. Coffin provides some ways forward in the analysis of different genres of historical explanation, and history writing, as well as ways of understanding time and chronology. This fine-grained level of analysis will throw up different

things from the data, but was beyond the work of this study.

11.6 Conclusion

This final chapter has revisited the key question which informed the study, namely: How is history knowledge recontextualised into pedagogic communication? The study used the case of the FET history curriculum in South Africa to address the question. I have reviewed the findings of the study at each level of the pedagogic device and have also interrogated some of the methodological implications of the study. By the end of the study it became clearer that while the theoretical tools provided by Bernstein were very useful, they needed to be supplemented by analytic tools that were more specific to the subject of history.

The study did not set out to prove any particular hypothesis, but to describe how the official message (of history, in this instance) is recontextualised at different levels of the pedagogic device. While there are many different findings as the message unfolds, the finding at the level of evaluation is key. The study speaks to the fact that in a vertical knowledge discourse (the discourse of formal school knowledge), there cannot be skills without knowledge. As the message is recontextualised down to the field of reproduction, the procedural dimension of history is eclipsing the knowledge dimension, specifically in the written assessment tasks. This is largely due to the discourse of outcomes-based education which has dominated education reform for more than a decade. However, procedures and knowledge in vertical discourse cannot be separated. When they are, we get the appearance of ‘doing history as historians do’, but this is not ‘history’ unless it is underpinned by coherent, chronologically informed understandings of the key events and narratives that have shaped our present.

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Appendices

Appendix A

Ethical clearance from UKZN



RESEARCH OFFICE (GOVAN MBEKI CENTRE)
WESTVILLE CAMPUS
TELEPHONE NO.: 031 – 2603587
EMAIL: ximbap@ukzn.ac.za

25 OCTOBER 2005

MS. CA BERTRAM (902409420)
EDUCATION


Dear Ms. Bertram

ETHICAL CLEARANCE APPROVAL NUMBER : HSS/05149A

I wish to confirm that ethical clearance has been granted for the following project:

“An analysis of the curriculum reform process from conceptualization to implementation: The case of History in the further education and training band”

Yours faithfully


.....
MS. PHUMELELE XIMBA
RESEARCH OFFICE

PS: The following general condition is applicable to all projects that have been granted ethical clearance:

THE RELEVANT AUTHORITIES SHOULD BE CONTACTED IN ORDER TO OBTAIN THE NECESSARY APPROVAL SHOULD THE RESEARCH INVOLVE UTILIZATION OF SPACE AND/OR FACILITIES AT OTHER INSTITUTIONS/ORGANISATIONS. WHERE QUESTIONNAIRES ARE USED IN THE PROJECT, THE RESEARCHER SHOULD ENSURE THAT THE QUESTIONNAIRE INCLUDES A SECTION AT THE END WHICH SHOULD BE COMPLETED BY THE PARTICIPANT (PRIOR TO THE COMPLETION OF THE QUESTIONNAIRE) INDICATING THAT HE/SHE WAS INFORMED OF THE NATURE AND PURPOSE OF THE PROJECT AND THAT THE INFORMATION GIVEN WILL BE KEPT CONFIDENTIAL.

cc. Faculty Research Office (Derek Buchler)
cc. Supervisor (Prof. K Harley)
cc. Supervisor (Dr. W Hugo)

Permission from the Department of Education



PROVINCE OF KWAZULU-NATAL
ISIFUNDAZWE SAKWAZULU-NATALI
PROVINSIE KWAZULU-NATAL

DEPARTMENT OF EDUCATION
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INHLOKOHHOVISI **PIETERMARITZBURG** **HEAD OFFICE**

Enquiries:
Imibuzo: Sibusiso Alwar
Navrae:

Reference:
Inkomba: 0060/05
Verwysing:

Date:
Usuku: 24 October 2005
Datum:

To: **Carol Bertram**

RE: APPROVAL TO CONDUCT RESEARCH

Please be informed that your application to conduct research has been approved with the following terms and conditions:

That as a researcher, you must present a copy of the written permission from the Department to the Head of the Institution concerned before any research may be undertaken at a departmental institution bearing in mind that the institution is **not obliged to participate** if the research is not a departmental project.

Research should not be conducted during official contact time, as **education programmes should not be interrupted**, except in exceptional cases with special approval of the KZNDoe.

The research is not to be conducted during the fourth school term, except in cases where the KZNDoe deem it necessary to undertake research at schools during that period.

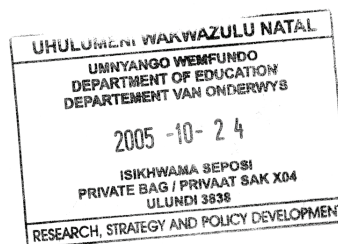
Should you wish to extend the period of research after approval has been granted, an application for extension must be directed to the Director: Research, Strategy Development and EMIS.

The research will be limited to the schools or institutions for which approval has been granted.

A copy of the completed report, dissertation or thesis must be provided to the RSPDE Directorate.

Lastly, you must sign the attached declaration that, you are aware of the procedures and will abide by the same.


SUPERINTENDENT GENERAL
KwaZulu Natal Department of Education



Appendix B

Interview schedule for curriculum writers

Thanks for agreeing to speak to me. The interview will probably take about an hour or an hour and a half. I'd like to tape the interview, so I don't have to write notes while we're talking. In terms of confidentiality, do you mind if your comments here are ascribed to you, or would you like to remain anonymous (that is, simply quoted as a member of the Subject Working Group). I will transcribe the interview. Would you be interested in seeing a copy of the transcription?

The general curriculum development process

What is your current job description?

What is your own interest/ background in the subject of History?

Why do you think you were chosen to sit on the Subject Working Committee for the Grades 10 – 12 (schools)? What constituency did you represent?

Which constituencies did the other members of the committee represent?

Please describe the process that the Committee went through when writing the History curriculum statement. (eg how many times did you meet, time frames, who did the actual writing up etc)

What were the terms of reference that the Committee had to work with?

Were there external pressures which were specific to the History curriculum committee?

The curriculum development process: specifically History

What do you think were the problems with the previous History syllabus, and how did the Committee work to address these issues?

What do you see as the biggest differences between the old NATED 550 syllabus and the new curriculum?

What was the process of deciding on the four Learning Outcomes for History?

One of the new aspects of the history curriculum is the focus on heritage, and issues around palaeontology, archaeology and genetics. How did this focus come to be part of the curriculum?

The new curriculum document seems to focus on world history, and the history of non-Western nations (for example in Grade 10, there is a focus on Africa, China, India and the Ottoman Empire, on Great Zimbabwe). How did the committee make

decisions about what content the new curriculum should cover and what should be left out?

The new curriculum does not have a specific focus on South African history. What were the discussions around this issue?

The way in which the new curriculum phrases some content statements seems to imply quite important value issues. For example: “what was the connection between slavery and the accumulation of wealth during the Industrial Revolution?” “What was the link between the Atlantic slave trade and racism?” What do you think is the role of History in teaching particular values eg. citizenship, non-racism, non-sexism, tolerance etc?

What were the contentious issues amongst the subject working group, issues where there was lots of negotiation, and then compromise?

How do you feel about the final curriculum statement that emerged from the group?

History as a discipline

What do you think is the purpose of teaching History at school?

How do you understand History as a specific discipline, and how is it different from other disciplines in the human sciences, like English or Geography for example? What is it that makes History a particular discipline in its own right?

What do you think are the key skills or procedures that underpin History as a discipline? At secondary school level, do you think the emphasis should be greater on the content or on the procedures?

What is your opinion on teaching History in a way that integrates it with other disciplines?

What do you think are the greatest challenges facing FET teachers as they engage with the new curriculum statements next year?

Appendix C

Interview schedule for publishers/ textbook writers

Thanks for agreeing to speak to me. The project is part of an NRF funded study on the development and implementation of the new FET curriculum. I'm interested in how publishers take the curriculum documents and convert them into textbooks. The interview will probably take about an hour or an hour and a half. I'd like to tape the interview, so I don't have to write notes while we're talking. The data will be published in academic articles and reports. In terms of confidentiality, your comments will remain anonymous and will not be linked to your specific publishing house. I will transcribe the interview. Would you be interested in seeing a copy of the transcription?

(Would be useful to have a copy of an old and new grade 10 textbook to refer to)

What is your job description? How long have you worked in publishing?

How do you understand the curriculum changes that have taken place since 1997? (for eg what does OBE mean?)

How do you keep abreast of the curriculum changes?

Please describe the process of how you take the curriculum documents and interpret them and write textbooks from them.

How do you choose your authors who write the textbooks? (possibly use the Grade 10 textbook as an example: who are these authors?)

What kind of training do your authors receive?

Are your authors skilled at writing in an OBE style?

How are your new textbooks (written according to the new curriculum documents) different from your old FET textbooks? What are the principles that underpin your new textbooks? (for example is there a greater focus on activities, and less on content?)

What is your experience of the provincial evaluation process of textbooks? (probe: what type of comments do you receive? are the comments often purely technical? Are the evaluators trained?) Do you think this is a useful process?

How would you describe your relationship as a publisher with the national DoE?

Do you have a specific type of school in mind as a market for your textbooks (eg well-resourced schools, second language learners etc)

Do you have a sense of how many schools buy your books? Are there many schools who only buy a copy for the teacher, and not for all the learners?

Have you done any research into how teachers actually use your books in their classrooms?

Do you write Teacher's Guide to accompany your books? What is the purpose of the Teacher's Guide?

History as a discipline

How do you understand the main differences between the old Grade 10 History syllabus and the new curriculum documents?

What do you think is the purpose of teaching History at school?

How do you understand History as a specific discipline, and how is it different from other disciplines in the human sciences, like English or Geography for example? What is it that makes History a particular discipline in its own right?

What do you think are the key skills or procedures that underpin History as a discipline? At secondary school level, do you think the emphasis should be greater on the content or on the procedures?

What is your opinion on teaching History in a way that integrates it with other disciplines?

What is your opinion about the role of History in teaching explicit values like citizenship, non-racism, non-sexism, tolerance etc?

What do you think are the greatest challenges facing FET teachers as they engage with the new curriculum statements next year? (probe: how will they work with the assessment standards, with new content?)

Appendix D

Interview schedule for teachers 2005 (initial interview)

Biographic profile

Why did you decide to become a teacher?

Where and when did you do your teacher training? Did you enjoy this time?

Being a History teacher

How long have you been teaching at this school? How long have you been teaching History all together? Do you teach any other subjects?

Why did you choose to teach History in particular?

What was your experience of learning History at school and at College/ University?

What do you enjoy most about teaching History?

What do you dislike about teaching History?

Which subject(s) at school do think History is most similar to? Which subject(s) is History most different to? Why do you say this?

What do you aim to do when you teach History? What do you hope that your learners will get out of learning History?

Why do you think it is important for children to learn History at school?

What skills/ qualities do you think makes a person “good at History”?

To what extent do you have to stick to the syllabus, or how much flexibility do you have over what you teach?

Do you use textbooks, or what other resources do you make use of?

Do you think learners see History generally as a “difficult” or an “easy” subject? Why do you think this is the case?

What kind of ‘status’ does History have in your school? Why do you think this is?

What percentage of Grade 9s choose to take History in Grade 10? What are learners’ popular perceptions about History?

Curriculum change

How do you understand the changes that have happened in the History curriculum recently (either the C2005 / RNCS changes or the upcoming FET changes)?

What do you think are the purposes of the curriculum changes?

If you teach Gr 9, how have these curriculum reforms impacted on your classroom teaching and assessment? If you teach Gr 10, do you have a sense of how the curriculum reforms might impact on your teaching and assessment next year?

Appendix E

Interview schedule for teachers (2006)

Tell me about teaching the new FET curriculum this year.

Probes:

How have you understood the changes required?

In what ways has the new curriculum impacted on the way you teach, the way you assess, the resources you use, the way you plan the year's work?

Have you used a new textbook?

In what ways do you feel positive about the new curriculum?

In what ways do you feel negative about the new curriculum?

Is there anything you feel is 'missing' from the new Gr 10 curriculum?

What does it mean to be a history teacher? How do you understand your role in teaching history? What is the purpose of teaching history?

Appendix F

Interview schedule for Grade 10 learners

Why have you chosen to take History in Grade 10?
(What do you think is the purpose of learning History at school?)

Do you see any differences in the way History is taught and assessed in Grade 10, compared to Grade 9?

What skills/ qualities do you think makes a person “good at History”?

Tell me about the qualities of a good history teacher.

Is History generally seen as a “difficult” or an “easy” subject? Why do you think this is the case?

Which subject(s) at school do think History is most similar to? Which subject(s) is History most different to? Why do you say this? What do you think you learn in History that you do not learn anywhere else?

Focusing on a particular assessment task or test

I see you have done a range of different assessment tasks this year: tests (including multiple choice), essays, a research report on Jack the Ripper, journal entries, a newspaper article on the execution of Louis XVI, working from sources. I’m interested in how you understand the demands of these different types of assessment.

Which of these tasks do you find the easiest to do? Why do you say so?

What do you think the teacher was looking for in your Jack the Ripper reports? What did you need to know and be able to do to produce a good report? What would a really good report look like?

What do you think your teacher expects you to know and be able to do in order to answer source-based questions? What makes you get a good mark in this kind of question?

What do you think your teacher expects you to know and be able to do in order to answer an empathy-type question (like a journal entry, a letter)? What makes you get a good mark in this kind of question?

What do you think your teacher expects you to know and be able to do in order to write a good history essay? What makes you get a good mark in an essay?

Do you know why you got the marks you did for your tasks this year? (In other words, does the teacher make the assessment criteria clear?)

Appendix G

Examples of how sentences were coded deductively using categories for the theory of instruction; classification and regulative and instructional discourses.

Theory of instruction:

Uncoded

The adoption of the Constitution of the Republic of South Africa (Act 108 of 1996) provided a basis for curriculum transformation and development in South Africa. (NCS, 2003)

F++ The National Curriculum Statement specifies the minimum standards of knowledge and skills to be achieved at each grade and sets high, achievable standards in all subjects. (NCS, 2003)

Specific aims are:

1.1 To give pupils a sense of such characteristics of historical knowledge as: its time dimension; the importance of placing events in their historical context; the concepts and terminology and the interpretations and perspectives of historical knowledge and the contributions made by related disciplines to historical knowledge. (ICS, 1996)

F+ The National Curriculum Statement Grades 10 – 12 (General) aims to develop a high level of knowledge and skills in learners. (NCS, 2003)

F- OBE encourages a learner-centred and activity-based approach to education. (NCS, 2003)

F^{++e}/Fⁱ

The Critical Outcomes require learners to be able to:

! identify and solve problems and make decisions using critical and creative thinking; (NCS, 2003)

Classification:

Inter-disciplinary examples

C It is a distinctive and well established discipline with its own methods, discourses and production of historical knowledge. (NCS, chap 2)

C+ compare ways in which memorials are constructed in different knowledge systems (e.g. monuments, ritual sites including grave sites);

C- It also draws on archaeology, palaeontology, genetics and oral history to interrogate the past. (NCS, Chap 2)

Intra-disciplinary examples

C++ *1.1.1 The political, economic, social and religious factors which led to the French Revolution and the contribution of Montesquieu, Voltaire and Rousseau (ICS, Std 8)*

C+ None

C- *What was the impact of conquest, warfare and early colonialism in the Americas Spain), Africa (Portugal, Holland) and India (France, Britain)? (NCS, chap 3, Grade 10)*

Inter-discursive examples

C++ None

C+ *Project work in connection with local and/or regional history is strongly recommended. (ICS)*

C- *The study of History supports democracy by:
engendering an appreciation and an understanding of the democratic values of the Constitution; (NCS, chap 2)*

Instructional and regulative discourses:

General Regulative Discourse (GRD)

Social transformation in education is aimed at ensuring that the educational imbalances of the past are redressed, and that equal educational opportunities are provided for all sections of our population. (NCS, Chap 1)

General Instructional Discourse (GID)

The National Curriculum Statement Grades 10 – 12 (General) aims to develop a high level of knowledge and skills in learners. (NCS, chap 1)

Specific Regulative Discourse (GRD)

Complex socio-affective competences

As a vehicle for human rights, History:

enables people to examine with greater insight and understanding the prejudices involving race, class, gender, ethnicity and xenophobia still existing in society and which must be challenged and addressed; and (NCS, chap 2)

This (an understanding of human agency) brings with it the knowledge that, as human beings, learners have choices, and that they can make the choice to change the world for the better. (NCS, chap 2)

Attitudes and values cannot be tested. The aim should be to contribute to the growth and maturing of the pupil. (ICS, General remarks)

Simple socio-affective competences

No statements were recorded

Specific Instructional Discourse (SID)

Complex cognitive competences

A rigorous process of historical enquiry:

| encourages and assists constructive debate through careful evaluation of a broad range of evidence and diverse points of view; (NCS, Chap 2)

Learning Outcome 1: The learner is able to acquire and apply historical enquiry skills. (NCS, Chap 3)

To contribute to their understanding of history as an academic discipline and the intellectual skills and perspectives which such a study involves. (ICS, General Aims)

Simple cognitive competences

No statements were coded

Appendix H

Indicators/ rubric for analysing the classroom data

Discursive rule **SELECTION** (F⁺⁻)

The extent to which teacher and learner have control over the selection of instructional knowledge

	F ⁺⁺	F ⁺	F ⁻	F ⁻⁻
1. In the introduction / discussion to a task	Learners have very little or no control	Learners have a little control	Learners have some control	Learners have substantial control
	The selection of knowledge in discussion is almost always determined by the teacher. Learners are rarely able to disrupt the selection to suit their own needs. Their interjections are generally dismissed or ignored or they are not seen to make any interjections.	The selection of knowledge in the discussion is determined by the teacher most of the time. On very few occasions is selection varied according to learner intervention or production	Learners have the opportunity to vary the selection of knowledge some of the time. Some learner suggestions are accepted, or the teacher alters selection, the course of discussion according to learners' productions.	Learners often make decisions around the selection of focus and discussion in the classroom. They are usually given the opportunity to determine the discussion and activity of the lesson.
2. In doing an activity	Learners have very little control	Learners have a little control	Learners have some control	Learners have substantial control
	The selection of tasks, activities and knowledge in the classroom is always or almost always determined by the teacher. Learners are rarely able to disrupt the selection to suit their own needs. Their interjections are generally dismissed or ignored or they are not seen to make any interjections.	The selection of tasks, activities and knowledge in the classroom is determined by the teacher most of the time. On very few occasions is selection varied according to learner intervention or production.	Learners have the opportunity to vary the selection of tasks, activities, knowledge some of the time. Some learner suggestions are accepted, or the teacher alters selection according to learners' productions.	Learners often make decisions around the selection of tasks and activities in the classroom. They are given opportunities to determine the knowledge content of the lessons.
3. When learners have concluded an activity	Learners have very little control	Learners have a little control	Learners have some control	Learners have substantial control
	Learners rarely or never make decisions around the selection of tasks and activities once they have concluded set work. Choices on how to continue are generally dictated by the teacher.	Learners seldom make decisions around the selection of tasks and activities once they have concluded set work. They have a narrow range of choices on how to continue, and the teacher makes most of the decisions on what should be done.	Learners sometimes make decisions around the selection of tasks and activities once they have concluded set work. They have a wide range of choices on how to continue, however the teacher makes quite a few suggestions on what they should do.	Learners often make decisions around the selection of tasks and activities once they have concluded set work. They have a wide range of choices on how to continue, and the teacher makes few if any suggestions on what they should do.

Discursive rule SEQUENCING (F⁺)

The extent to which teacher and learner have control over the sequencing of instructional knowledge

	F ⁺⁺	F ⁺	F ⁻	F ⁻⁻
4. In the course of the lesson	<p>Learners have very little control</p> <p>The teacher always or almost always determines the sequence of transmission of knowledge in the lesson. Any interjections potentially disturbing the order of learning are dismissed or ignored.</p>	<p>Learners have a little control</p> <p>The teacher more than half of the time determines the sequence of transmission of knowledge in the lesson. She mostly determines the order in which learning should take place.</p>	<p>Learners have some control</p> <p>Learners have the opportunity to vary the sequence of the transmission some of the time. The teacher sometimes responds to learners' interjections by varying the sequence of the learning.</p>	<p>Learners have substantial control</p> <p>Learners often make decisions around the sequence of tasks and activities in the lesson. They are regularly given options regarding the order in which to do things</p>

Discursive rule PACE (F⁺)

The extent to which teacher and learner have control over the pacing of instructional knowledge

	F ⁺⁺	F ⁺	F ⁻	F ⁻⁻
5. In the introduction / discussion / question and answer	<p>Learners have very little control over the pace</p> <p>The teacher always or mostly defers or ignores learners' questions and interjections, or learners make no interjections. Exposition, debate and discussion is not changed or disrupted by the learners.</p>	<p>Learners have a little control over the pace</p> <p>The teacher accepts few learner interjections and questions. She answers questions briefly and moves on. Time is mentioned quite often</p>	<p>Learners have some control over the pace</p> <p>The teacher accepts some learner interjections and questions. She pauses the lesson briefly to make sure that all learners are ready to move on before doing so.</p>	<p>Learners have substantial control over the pace</p> <p>The teacher accepts most or all learner interjections and questions. She makes sure that all learners are ready to move on before doing so. The discussion may be extended or deviate due to learners' interjections.</p>

	F ⁺⁺	F ⁺	F ⁻	F ⁻⁻
6. In the learners doing activities / tasks	<p>Learners have very little control over the pace</p> <p>The pace at which learners work through tasks is almost always strictly controlled by the teacher. Injunctions to 'hurry up' or 'work slowly' and mention of time are frequent. Learners are not able to disrupt the pace set by the teacher. There is extremely strict adherence to time frames.</p>	<p>Learners have a little control over the pace</p> <p>The pace at which learners work through tasks is mostly determined by the teacher. Time is mentioned quite often and on occasion the length of an activity is stipulated beforehand.</p>	<p>Learners have some control over the pace</p> <p>Learners work at their own pace. The teacher exercises some control over pace, but remains open to its variation.</p>	<p>Learners have substantial control over the pace</p> <p>Learners work at their own pace. The teacher places no pressure on them to finish in a stipulated period, but generally waits until they have all finished, or gives them further opportunities to catch up.</p>

Discursive rule **EVALUATION CRITERIA (F⁺⁻)**

The extent to which teacher and learner have control over the evaluative rules of the instructional knowledge pertaining to the meaning of concepts and principles and their appropriate realisation

7. In the introduction / explanation / exposition to a topic / task	F⁺⁺ Evaluative rules very clear and explicit	Teacher always or almost always makes the evaluative rules available through exposition. Explicitly defines and explains the meaning of concepts, addresses key aspects of the knowledge or operation under discussion through questioning and explanation. She makes it clear exactly how a task should be completed.	F⁺ Evaluative rules quite clear and explicit	Most of the time the teacher makes the evaluative rules available in an explicit and clear manner through explication and discussion. The requirements for the successful completion of a task are generally clear, although there may be some aspects that remain implicit.	F⁻ Evaluative rules quite unclear and implicit	The concepts and principles being addressed in the exposition are sometimes unclear. Attempts are made to make the requirements for the successful production of a text available to learners, but these are often unclear or not articulated. Some ambiguity as to what should be done and how it should be done exists.	F⁻ Evaluative rules very unclear and implicit	Generally the teacher does not draw out the knowledge principles in her exposition. Very little or no attempt is made to make the requirements for the successful production of a text available to learners. Learners are unclear as to how to proceed, or proceed in any manner they choose.
	F⁺⁺ Evaluative rules very clear and explicit	The teacher constantly moves around and monitors what learners are doing and making comments. To the whole class and to individuals she repeatedly goes over what constitutes an appropriate performance.	F⁺ Evaluative rules quite clear and explicit	The teacher makes some points either to the whole class or to individual learners so as to clarify what is expected of them in the task.	F⁻ Evaluative rules quite unclear and implicit	The teacher makes a few comments during the course of the task and looks at some of the learners work, or listens to them read, however this is not sustained and the criteria for a successful production are not made explicit to all.	F⁻ Evaluative rules very unclear and implicit	The teacher looks at a few learners' work when it is brought to her attention. She rarely or never listens to them read. Rarely she makes a comment to the learner. These are not extended to the whole class.
8. In the course of learners conducting an activity or task								

9. In the kinds of verbal answers required of learners	F⁺⁺	Evaluative rules very clear and explicit	Learners are always or almost always required to give reasons for their answers always. They may be asked to draw out a more general principle to support, clarify or modify their answer. In incorrect responses the teacher shows why the answer is incorrect. The teacher usually elaborates on a correct answer.
	F⁺	Evaluative rules quite clear and explicit	Learners are often required to give reasons for their answers. They are sometimes asked to clarify or modify their answer. In incorrect responses the teacher often shows why the answer is incorrect. The teacher often elaborates on a correct answer.
	F⁻⁻	Evaluative rules quite unclear and implicit	Learners are on a few occasions required to give reasons for their answers. In incorrect responses the teacher sometimes shows why the answer is incorrect. The teacher does not elaborate on a correct answer.
	F⁻	Evaluative rules very unclear and implicit	The teacher looks only for yes / no answers, or for learners to repeat what she has just said. Incorrect answers are generally ignored, or the reasons for them are not sought. Correct answers are accepted and may be praised, but are not elaborated on.

10. At the conclusion of the task / activity	F⁺⁺	Evaluative rules very clear and explicit	The teacher makes specific comments around what constitutes an appropriate production. There is rigorous evaluation of learners' productions. She gives examples of both success and failure in the task and may point to individual performances. Marking of the work with comments on individual items in the activity may occur.
	F⁺	Evaluative rules quite clear and explicit	The teacher makes some comment on what constitutes a successful production, but this is directed more at the class as a whole and on general points.
	F⁻⁻	Evaluative rules quite unclear and implicit	Learners work is ticked and signed or corrections are written up on the board but with little or no comment as to what constitutes an appropriate production.
	F⁻	Evaluative rules very unclear and implicit	The teacher looks at, ticks, and or signs the learners work making little or no comments on it. Students are not given access to the criteria for success or failure in their productions.

Hierarchical rule **TEACHER – LEARNER (F⁺)**

The extent to which teacher and learner have control over the order, character and manner of the conduct of learners in the relation between teacher and learner

11. When learners do routine activities in the classroom	F⁺⁺	F⁺	F⁻	F⁻⁻
	Learners are never / very rarely self-regulating	Learners are seldom self-regulating	Learners are often self-regulating	Learners are predominantly self-regulating
	Almost all routine activities are as a result of explicit instruction from the teacher. Learner reception is passive, and discipline is controlled by the teacher. When the teacher is absent from the class activity mostly ceases	The learners largely do things in the classroom in response to instructions from the teacher. They seldom indicate the habitualising of certain routines and discipline.	The learners are sometimes self-regulating. There is some didactic instruction from the teacher regarding learning and disciplinary routines.	The learners to a large extent are self-regulating and active with respect to learning. They manage their own books, and have internalized certain routines and disciplinary norms.

12. When the teacher disciplines a learner or learners	F⁺⁺	F⁺	F⁻	F⁻⁻
	Positional or imperative	Mostly positional	Personal or positional	Mostly personal
	The teacher becomes angry and admonishes the learner based on positional control and threatens further action (physical or non). Rationales for actions are not provided by the teacher.	The teacher admonishes the learner using positional control. Rules and control are generally based on formal status relation teacher-pupil, or on sex or age attributes of child.	The teacher listens to learners' reasons for their actions and reproves them based on personal or positional control.	The teacher mostly listens to learners' reasons for their actions and provides a counter argument using personal control. Teacher provides a personalised rationale for her actions.

13. When the teacher asks the learner to do a task unrelated to the instruction	F⁺⁺	F⁺	F⁻	F⁻⁻
	Positional or imperative	Mostly positional	Personal or positional	Mostly personal
	The teacher provides no rationale as to why the task should be done. The task is unrelated to the class or to school activities in general (e.g. making the teacher tea).	The teacher provides little or no rationale as to why the task should be done. The task is generally related to the class or to school activities in general (e.g. opening the windows).	The teacher often provides a rationale as to why the task should be done. The task is always related to the class or school activities in general. Learners may conduct duties that are routinised.	The teacher always provides a rationale as to why the task should be done. The task is always related to the class or school activities in general. Learners may conduct duties that are routinised, on a rotational basis.

Hierarchical rule **LEARNER – LEARNER (F⁺⁻)**

The extent to which teacher and learner have control over the order, character and manner of the conduct of learners in the relation between learners

	F ⁺⁺	F ⁺	F ⁻	F ⁻⁻
14. In the way in which learners are seated and change seating in the classroom	Regulated by teacher	Mostly regulated by teacher	Sometimes regulated by the learner	Regulated by the learner
	Learners sit in seats or groups assigned by the teacher. Learners may not change the composition of their groups or change their seating place.	Learners sit in seats or groups which have been negotiated between teacher and learners. Learners may request to change the composition of their groups or their seating place at times.	Learners sit in seats chosen by themselves. The seating arrangement is at times altered by the teacher, or at the request of a learner.	Learners sit in seats chosen by themselves. The seating arrangement may be altered by the learners.

Discursive relations **INTER-DISCIPLINARY RELATIONS (Between subject areas) (C⁺⁻)**

The extent to which reference is made to knowledge from other subjects in the teaching of a particular content/s

	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
15. In the introduction / explanation / exposition to a topic / task	Seldom references other contents	Sometimes references other contents	Often references other contents	Very often references other contents
	There is very little or no referencing of content from other subject areas within a particular History lesson.	Contents from other subject areas are sometimes referred to.	There is substantial referencing of contents from other subject areas to explain the topic under discussion or to revise or remind learners.	Contents from other subjects are constantly referred to, to the extent that it difficult at times to determine what the focus subject is.

	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
16. In the tasks that are set for learners	Seldom references other contents	Sometimes references other contents	Often references other contents	Very often references other contents
	Tasks rarely or never relate knowledge from other subject areas.	On a few occasions tasks reference contents of other subject areas. Tasks may reference other subjects through the use of a particular theme framing the task, however, this does not constitute the focus.	There is substantial referencing of contents from other subject areas in the tasks that are set.	Contents from other subjects are very often referenced in tasks. Often knowledge of the History topic is obscured.

Inter-discursive relations INTER-DISCURSIVE RELATIONS (Between school and everyday knowledges) (C⁺⁻)
 The relation in the instructional knowledge between everyday knowledge and History knowledge.

	C ⁺⁺	C ⁺	C ⁻	C ⁻
17. In the discussion of the topic or the task	<p>The relation is always explicit and concept directed</p> <p>Everyday knowledge is referenced only in order to explicate the History knowledge (content, operations, procedures) introduced. The relation between the knowledges is made explicit. Other references to everyday knowledge are dismissed.</p>	<p>The relation is often explicit and concept directed</p> <p>Everyday knowledge is mostly referenced in order to explicate the History knowledge (content, operations, procedures) introduced. The relation between the knowledges is generally made explicit. Most other references to everyday knowledge are dismissed.</p>	<p>The relation is often implicit and theme directed</p> <p>Everyday knowledge is often referenced; the connection between the everyday knowledge and the History topic or task is less explicit. This may occur through the deployment of a theme.</p>	<p>The relation is always / almost always implicit and theme directed</p> <p>Everyday knowledge is constantly referenced; the distinction between the History topic or task and everyday knowledge is not explicit. Everyday knowledge in order to elaborate the theme (as opposed to the concept) is often deployed or accepted.</p>
	18. In the responses and questions of the learners	<p>Everyday knowledge is rejected</p> <p>Learners' responses and questions that refer to the everyday are dismissed or ignored. Only references to everyday knowledge that relate explicitly to the History topic or task are accepted.</p>	<p>Sometimes everyday knowledge is accepted and integrated</p> <p>Learners' responses and questions that refer to the everyday are sometimes addressed and the connections between these and the History topic or task are at times made explicit.</p>	<p>Often everyday knowledge is accepted and less integrated</p> <p>Learners' responses and questions that refer to the everyday are often accepted. The connections between these and the History topic or task are often implicit or do not exist.</p>

	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
19. In the tasks that are given to learners	The focus is always on the History concepts/s	The focus is mostly on the History concepts/s	The focus is seldom on the History concepts/s	The focus is rarely / never on the History concept
	The tasks require an engagement with the History topic or task only. No reference to the everyday is seen or made. Tasks require solely the working with the History task or topic at hand.	The tasks require an engagement with the History topic or task, however some reference is made to everyday knowledge through the deployment of themes, through pictures or titles. These however do not constitute the focus of the task.	The tasks require an engagement with some of the History topic or task, however everyday knowledge is included in such activities as colouring in, singing, verses or drawing.	The tasks require very little or no engagement with the History topic or task. Everyday knowledge predominates in such activities as colouring in, singing, verses or drawing. Very little or no specialised History concepts or operations are contained in the activities.

Discursive relations INTRA-DISCIPLINARY RELATIONS (C⁺)

The extent to which reference is made to other contents in the subject area in the teaching of a particular content/s, reference to similar past or future topics, or the statement of more general principles, axioms or rules

	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
20. In the introduction / explanation / exposition to a topic / task	Very often refers to other contents	Often refers to other contents	Sometimes refers to other contents	Rarely refers to other contents
	The teacher very often or in a significant and explicit way makes reference to other content of History.	The teacher at times makes reference to other content of History.	The teacher on a few occasions makes reference to other content of History.	The teacher rarely or never makes reference to other content of History.

	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
21. In the response to questions from learners	Very often refers to other contents	Often refers to other contents	Sometimes refers to other contents	Rarely refers to other contents
	The teacher very often or in a significant and explicit way makes reference to other content.	The teacher at times makes reference to other content of History.	The teacher on a few occasions makes reference to other content of History.	The teacher rarely or never makes reference to other content of History.

22. At the conclusion of the task / activity	C⁺⁺ Very often refers to other contents	C⁺ Often refers to other contents	C⁻ Sometimes refers to other contents	C⁻⁻ Rarely refers to other contents
	The teacher very often or in a significant and explicit way makes reference to other content.	The teacher at times makes reference to other content of History.	The teacher on a few occasions makes reference to other content of History.	The teacher rarely or never makes reference to other content of History.

Relations between SPACES (specialisation of space for teaching and learning) (C⁺⁻)

The extent to which space/s in the classroom are marked off and specialised for teaching and learning, and the strength of insulation between the classroom and the outside.

23. Between inside and outside the classroom	C⁺⁺ Very bounded	C⁺ Quite bounded	C⁻ Quite unbounded	C⁻⁻ Very unbounded
	The teacher rarely or never leaves the classroom. Learners' movement out of the classroom is strictly monitored and curtailed. There are few interruptions and these are generally formal (via intercom). The surrounding classrooms are generally quiet.	The teacher on a few occasions leaves the class, and learners generally remain in class or ask specific permission to leave the classroom. The surrounding classrooms are quiet.	The teacher generally remains in the classroom, but there are often disruptions from the outside (incl cell phone) and children at times move in and out of the classroom. There are a few noise interruptions from outside.	Teacher and learners often move in and out of the classroom. There are often disruptions from other teachers, parents, students. The surrounding classrooms are noisy.

Relations between SPACES (insulation between teacher's space and learners' space) (C⁺)

The extent to which space/s in the classroom are marked off for teacher and learners, and the strength of insulation between teacher and learners' spaces.

24. In movement between teacher and learner space	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
	Very bounded	Quite bounded	Quite unbounded	Very unbounded
	The teacher and learners generally remain in their own spaces. The teacher mostly remains in her desk or at the blackboard and learners remain in their seats. Sometimes a learner may approach the teacher for help with permission, or the teacher on a few occasions may approach a pupil in their space.	The teacher and learners generally remain in their own spaces but quite often move into each others' spaces particularly to facilitate the marking of tasks.	The teacher often enters the learners' spaces to monitor what they are doing and give assistance. Learners also regularly approach the teacher.	The teacher spends the majority of the time in the same space as the learners, checking work, marking, assisting. She rarely sits at her desks. Learners approach her frequently wherever she is.

Relations between SUBJECTS (teacher and learner) (C⁺)

The extent to which the teacher and the learners' roles are specialised with respect to the classroom and its practices

25. In the kinds of activities engaged in by the teacher	C ⁺⁺	C ⁺	C ⁻	C ⁻⁻
	Very bounded	Quite bounded	Quite unbounded	Very unbounded
	The teacher is always mostly engaged in activities related to teaching and learning. A very small portion of her time involves attending to administrative issues.	The teacher is generally engaged in activities related to teaching and learning. A small portion of her time involves attending to administrative issues.	The teacher spends about half the time engaged in teaching and learning and the other half in dealing with administrative issues. On a few occasions she attends to personal issues.	The teacher spends the majority of time attending to issues unrelated to teaching and learning. These issues may also not concern administrative functions pertaining to the classroom.

26. In the kinds of activities engaged in by the learners	C⁺⁺ Very bounded	C⁺ Quite bounded	C⁻ Quite unbounded	C⁻⁻ Very unbounded
	Almost all of the time learners are engaged in school work. They do have some tasks like opening windows which they do at the beginning of the day.	Learners mostly do school work but some of the time is spent sitting and waiting. Small tasks unrelated to learning are at times evident.	Learners often are engaged in activities that do not have anything to do with learning. Much of the time is taken up by sitting and waiting, prayers, eating, cleaning.	Learners mostly are engaged in activities that do not have anything to do with learning. Much of the time is taken up by sitting and waiting, prayers, eating, cleaning.

27. In the behaviour of the learners	C⁺⁺ Very bounded	C⁺ Quite bounded	C⁻ Quite unbounded	C⁻⁻ Very unbounded
	Learners work consistently, the teacher rarely of never disciplines them or tells them to keep quiet	Learners generally work consistently. At times the teacher has to ask the learners to keep quiet or sit down.	Often the teacher battles to get learners to work quietly and consistently. Especially towards the end of a task she has to often tell learners to sit down or be quiet.	The teacher constantly tells learners to sit down or to keep quiet. All learners do not work consistently and are frequently playing, talking or out of their seats.

28. In the dress of the learners	C⁺⁺ Very bounded	C⁺ Quite bounded	C⁻ Quite unbounded	C⁻⁻ Very unbounded
	Learners are generally formally dressed in school uniform. Some may at times wear sports clothes.	Learners all have school uniform. Learners are generally neat, although some learners do wear slightly different variations of the uniform.	Most of the learners wear school uniform but several do not. A few are untidy or without parts of the required uniform.	Many of the learners don't have school uniform. Some are inappropriately dressed, others are untidy.

Appendix I

Questionnaire for FET history teachers October 2005

This questionnaire forms part of a study which investigates history teaching and assessment in the context of curriculum reform. Your co-operation would be really appreciated. All responses will be anonymous.

Thank you

Carol Bertram, School of Education and Development, UKZN

1. How would you describe your school? urban township rural
2. What are the annual school fees? _____
3. What percentage of Grade 10 learners choose to take history? _____
4. What are your academic and professional qualifications, and from which institution?

5. Did you train to teach *history* at secondary school level? (ie. Did you study history teaching methodology at University/College?) Yes No
6. To what level did you study history at University/ College?
I didn't study history 2 years of history 3 years of history
1 year of history Honours in history Masters in history
7. What other subjects do you teach? _____
8. For how many years have you been teaching Gr 10 history? _____
9. Have you attended OBE training for the GET phase before? Yes No
10. Do you have a copy of the National Curriculum Statement for history at your school?
Yes No I don't know
- 10a. If yes, to what extent did you read the curriculum document (*before* coming to this workshop)?
I have read the whole document
I have browsed through the whole document
I have read only the outcomes and the content and contexts.
I have not read the document at all.
11. At the beginning of 2004, all secondary schools were supplied with a set of resource books to assist with the teaching of Africa, called the *UNESCO General History of Africa vols 1-8*.
Do you have a set of these books at your school? Yes No I don't know

- 11a. If yes, to what extent have you made use of the books?
I have found them a useful resource and used them often in my teaching
I have used them occasionally as a teaching resource.
I have browsed through them, but have not used them in my teaching
I have not read or used the books at all.
12. Will your school buy new history textbooks for the Gr 10 learners next year? Yes
No
- 12a. If yes, which book are you planning to buy? _____
13. Why do *you* think it was necessary for the history curriculum for Grade 10 – 12 to be reformed?
14. What do you understand as the purpose of teaching history at school?
15. In what ways has this workshop equipped you to understand and implement the new FET history curriculum?
16. What challenges do you see for yourself with regards to effectively implementing the new Gr10 curriculum in 2006?

If you would be willing to be interviewed about your experience of implementing the new curriculum in 2006, please could you give me your name and contact details.

Thank you very much for your time.

Appendix J

FET teacher training workshop: Chronology of presentations and tasks

Day 1	Generic introduction to the NCS
Day 2	There are 30 teachers present. 19 are black African, 3 are 'white' and 8 are 'Indian'.
Episode	Content
Ice breaker: names	Names give us an identity, and history is about identity.
Power Point Presentation 1: <i>Shifts in the FET curriculum</i> (1 hour 15 mins) 9.5%	History in context. History as a discipline has changed. A history of history as a discipline: the scientific or objective history of van Ranke, the impact of Karl Marx with a history from below and then post- modernism, where there is no one truth and sources are flawed. Focus on the FET curriculum – a move from knowing history to doing history. Reviews the Learning Outcomes, Assessment Standards and Knowledge Framework. Emphasises the way in which the curriculum states the content as questions, takes a new focus, it's not just the Industrial Revolution as has been taught before.
Group Activity 1 9.55 – 10.20 (25 mins) 3.2%	Use one Assessment Standard and plan a basic activity for learners that will enable them to achieve that AS.
Report backs on group activity 1 10.40 – 11.02 (22 mins) 2.8%	
Discussion on LO 4 Heritage 1.6% (13 mins)	Every Grade 10 learner is expected to produce a heritage assignment.
Power Point 2 slide show on monuments. 11.15 – 11.50 (35 mins) 4.5%	Focus on using monuments to war heroes etc as a way of understanding the past.
Group task 2 11.50 – 12.20 (30 mins) 3.9%	Look at the Heritage outcomes and think how you might plan a heritage assignment for your learners. There is no evaluation of this task. Facilitator ends by saying "We've opened up the topic. Learners need to get out of the classroom."
Video on marketing history within the school. 12.20 – 12.45 (25 mins) 3.2%	Discussion on marketing history within the school - the role that history teachers need to play in building the profile and prestige of the subject of history.
Group task 3 12.45 – 1.15 (30 mins) 3.8%	Come up with ideas for marketing history in your school.

Day 3	20 teachers present. In the group I'm sitting with, two of the women who were present yesterday are not here. There is a new woman who says that she is not a History teacher, but is attending on behalf of a colleague at her school.
Episode	Content
Facilitator chatting (20 mins)	General discussion on marketing history and anecdotes about how other teachers have done this.
Assessment Power Point Presentation 3 8.50 – 9.50 (1 hour) 7.6%	Facilitator goes through the slides – tables of the old and new ways of assessing, different kinds of assessment (eg baseline, formative, diagnostic, summative) Final part of presentation – that the new content would be phased in in 2006 – the four minimum sections that need to be covered are Industrial Revolution, slavery, quest for liberty and the transformation in Southern Africa.
Group task 4 9.50 – 10.00 (10 mins) 1.2%	Look at an essay topic and decide which Assessment Standards would be covered in this topic. Topic: <i>It was the economic factors that resulted in the outbreak of the French Revolution in 1789.</i>
Report back 4 10.00 – 10.07 (7 mins) 1%	A member of the group I was sitting with said it was LO 3, AS 1 “understands and converts statistical information to graphical or written information”. Strong evaluation criteria from facilitator. “this would not work with this topic – where would the statistical evidence be?”
Individual/ group task 5 10.30 – 11.00 (30 mins) 3.8%	Marking essays. There is a set of 3 essays in the workshop material and a marking rubric. Teachers must mark these individually, and then come up with a group mark for each essay.
Report back 5 11.00 – 11.28 (28 mins) 3.6%	The groups had to justify why they had allocated the marks to each essay. There were quite strong correlations between the marks allocated by each group to an essay. There are discussions about what makes a good history essay – linking sentences, linking directly to the topic.
History as enquiry Power Point Presentation 4 11.28 – 12.00 (32 mins) 4%	Going through the “History as enquiry” cycle – starts with a key question, then gather sources to answer the question, work with the sources (ie analyse, interpret, organize evidence and then synthesise) then communicate the answer (ie. Write a piece of history, have a debate, etc)
Power Point Presentation LTSMs 12.00 – 12.20 (20 mins) 2.6%	How the ‘history as enquiry cycle’ would become evident in a textbook. Shows a British textbook as an example.
FET planning Power Point Presentation 5 12.20 – 13.00 (40 mins) 5.1%	Covers a whole range of new terms: a subject framework, a work schedule for each level and then lesson plans. A different facilitator.
Group task 6 13.00 – 13.30 (30 mins) 3.9%	Fit the year’s content into year planner.

Day 4	A total of 26 teachers are present today, four of these were not present yesterday. In my group the agricultural science teacher is not present, but the two teachers who were present on Wednesday have returned.
Episode	Content
Setting up the group task 7 8.30 (30 mins) 3.9%	Today the focus is on lesson planning rather than activity planning. Facilitator allocates each group with a topic: slavery, American War of Independence, French Revolution, Mfecane. The task is: select some sources (each topic had a range of sources in the workshop booklet), think of a key question and then design 10 source-based questions, which must target the LO and AS. Finally set a 'knowledge construction' question.
Group task 7 9.00 – 10.40 (1 hour, 40 mins) 12.8%	The groups get down to the task. The group I am sitting with is allocated the Mfecane.
Report back 7 11.00 – 12.40 (1 hour, 40 mins) 12.8%	Each group reports back on their key question and source questions.
Wrapping up 12.40 (20 mins) 2.5%	The key issues are summed up.

Appendix K

Quantitative averages of teachers' pedagogic discourse per lesson, 2005 and 2006

Enthabeni 2005 Mr Mkhize	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	4	4	4	2	4	4	4
Lesson 2	4	4	4	2	4	4	4
Lesson 3	4	4	3.3	2	4	4	4
Lesson 4	4	4	3.3	2	4	4	4
AVERAGE	4	4	3.65	2	4	4	4

Enthabeni 2006 Mrs Shandu	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	4	3.8	3.2	3.6	4	4	4
Lesson 2	4	4	3	3	4	4	4
Lesson 3	4	4	4	4	4	4	4
Lesson 4	4	4	3.3	3.6	3.3	4	3
Lesson 5	4	4	4	4	4	4	4
AVERAGE	4	3.3	3.6	3.3	4	4	3.8

North Hill 2005 Mrs Naidoo	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	4	4	4	3	4	4	3
Lesson 2	4	4	4	3	4	4	3
Lesson 3	4	4	3.5	3.3	4	4	4
Lesson 4	4	4	4	4	4	4	4
Lesson 5	4	4	2.8	3.4	4	4	4
AVERAGE	4	4	3.6	3.3	4	4	3.6

North Hill 2006 Mrs Naidoo	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	3.75	3.25	2,75	3	4	4	4
Lesson 2	4	4	3	3	4	4	4
Lesson 3	4	4	3.6	3.4	4	4	4
Lesson 4	4	3.8	3.4	3.2	4	3.75	3.75
Lesson 5	4	4	3.6	3.3	4	4	4
AVERAGE	3.9	3.8	3.2	3.2	4	3.9	3.9

Lincoln 2005 Mrs Lawrence	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	3.5	3.25	3	3.5	4	3.6	3.6
Lesson 2	3.3	2.6	2.3	3.3	4	3.3	3.3
Lesson 3	3.6	3.6	3.3	3.6	3.3	3.3	2.6
Lesson 4	4	4	3.3	3.3	3.5	3.4	3.5
Lesson 5	2.8	2.8	2.7	3	4	4	4
AVERAGE	3.4	3.2	2.9	3.3	3.7	3.5	3.4

Lincoln 2006 Mrs Lawrence	Framing				Classification		
	Selec- tion	Seq	Pacing	Eval	Inter- discip	Intra- discip	Inter- discursive
Lesson 1	3.8	3.8	3.1	3.6	3.8	3.6	4
Lesson 2	4	4	3.75	4	4	2.75	3.75
Lesson 3	3.8	3.8	3.8	3.8	3.75	3.75	3.5
Lesson 4	4	3.8	3.5	4	2.6	4	2.6
Lesson 5	4	3.8	3	3	2	3	2
AVERAGE	3.9	3.8	3.4	3.7	3.2	3.4	3.1

Appendix L

Using Bloom's Revised Taxonomy to code formal assessment tests

Questions that required learners to give definitions and most multiple choice questions were coded as *Remember Factual Knowledge*.

Examples of how other questions were coded are given below.

Example 1

Learners were given a cartoon of dark-skinned child on a 'Europeans Only' beach pulling down his costume to show a policeman that he is in fact a white child. The question is:

Explain the message being sent out by the baby in Source B. (4) (North Hill test on Apartheid)

This question was coded as *Analyse Conceptual knowledge (4B)*, since it seemed that learners were required to analyse the cartoon using their knowledge about Separate Amenities legislation.

Example 2

Learners are given an excerpt of evidence presented by a witness at the inquest of one of Jack the Ripper's victims.

How reliable do you find this source as evidence in identifying the main suspect? Explain your response in a paragraph of 4 – 5 lines in length. (5)

This question was coded as *Evaluate conceptual knowledge (5B)* as learners are required to evaluate the evidence they are given by explaining how valuable the source is in identifying the main suspect.

Example 3

Imagine you were living in the Apartheid Days. Write a diary entry on how you feel about the natives Resettlement Act of 1954. (5) (North Hill test on Apartheid)

Questions that required learners to write an empathy response were coded as *Understand Conceptual Knowledge (B2)*. They were required to show understanding through a piece of writing based on their conceptual knowledge of the historical time. Other examples were that learners were required to create a letter or newspaper article or diary entry that draws on their knowledge of the links and relationships between their historical knowledge.

Appendix M

Levels of the pedagogic device and textual artefacts

Official Recontextualising Field (ORF)

- M1 *Definition and purpose of history* from the National Curriculum Statement for History Grades 10 – 12 (Department of Education, 2003)
- M2 *Ways to achieve the history learning outcomes* from the Learning Programme Guidelines for History (Department of Education, 2005)
- M3 *Example of how to develop source-based questions* from the Subject Assessment Guidelines (Department of Education, 2007)

Pedagogic Recontextualising Field (PRF)

- M4 An example of source material. Extract from the Supplementary Material given to teachers at the FET Training workshop, October 2005.
- M5 Extract from Chapter 5, 'The Industrial Revolution' from J. Bottaro, P. Visser and N. Worden (2005). *In Search of History, Grade 10 Learner's Book*. Cape Town: Oxford University Press.

Field of Reproduction

- M6 'Did the lives of ordinary working people really improve during the Victorian era?' Worksheet used in Lincoln classroom 2006.
- M7 Worksheet used in North Hill classroom 2006, during the topic of the French Revolution (source not given).
- M8 Extract from Unit 6 'European domination of the world' from Brink, E., Gibbs, K., Thotse, M.L. and Verner, J. (2005) *History for all Grade 10 Learner's Book*. Braamfontein: MacMillan South Africa. This page was used in a lesson at Enthabeni in 2006. Learners had to answer the question 'What was the effect of colonialism?'
- M9 *Question 3: The Industrial Revolution and sources* from the DoE Grade 10 History Exemplar examination paper, November 2006. The same questions and set of sources were also used in a North Hill class test.
- M10 Examples of two learners' responses to the Industrial Revolution Questions in M9.

CHAPTER 2

HISTORY

DEFINITION

History is the study of change and development in society over time and space. It also draws on archaeology, palaeontology, genetics and oral history to interrogate the past. The study of History enables us to understand and evaluate how past human action impacts on the present and influences the future.

PURPOSE

A study of History builds the capacity of people to make informed choices in order to contribute constructively to society and to advance democracy. As a vehicle of personal empowerment, History engenders in learners an understanding of human agency. This brings with it the knowledge that, as human beings, learners have choices, and that they can make the choice to change the world for the better.

A rigorous process of historical enquiry:

- encourages and assists constructive debate through careful evaluation of a broad range of evidence and diverse points of view;
- provides a critical understanding of socio-economic systems in their historical perspective and their impact on people; and
- supports the view that historical truth consists of a multiplicity of voices expressing varying and often contradictory versions of the same history.

The study of History supports democracy by:

- engendering an appreciation and an understanding of the democratic values of the Constitution;
- encouraging civic responsibility and responsible leadership;
- promoting human rights, peace, and democracy; and
- fostering an understanding of identity as a social construct, preparing future citizens for local, regional, national, continental and global citizenship.

As a vehicle for human rights, History:

- enables people to examine with greater insight and understanding the prejudices involving race, class, gender, ethnicity and xenophobia still existing in society and which must be challenged and addressed; and
- enables us to listen to formerly-subjugated voices, and focuses on the crucial role of memory in society. This comes particularly through an emphasis on oral history and an understanding of indigenous knowledge systems.

2.6 WAYS TO ACHIEVE HISTORY LEARNING OUTCOMES

2.6.1 Approach to the teaching of History

FET History promotes the following:

- **history is a process of enquiry** based on evidence from the past. This means that learners must be given opportunities to engage with authentic sources from the past.
- **knowledge in History is constructed.** The emphasis is on knowledge construction from the evidence derived from historical sources as an approach.
- **South African history within an African continental perspective is prioritised.** South Africa is part of the continent of Africa and Africa has a rich history which school texts and teaching should reflect. History seeks to foreground the wealth of contemporary research in African history, archaeology and palaeontology.

The above approach to the study of history in schools emphasises *doing history*, which entails introducing the historian's craft (how historians work) in the classroom. This approach consolidates and strengthens outcomes-based education learning and teaching methodologies. It is learner centred, integrates high skills with content and is resource based (source based).

2.6.2 The nature of History teaching and learning

The diagram that follows illustrates the enquiry process followed in order to construct historical knowledge and understanding. It also shows the way in which the Learning Outcomes of History constantly work together.

The teacher and learner together are the historians in the classroom. The teacher or the learners ask the historical questions that will focus the investigations. These should, where possible and appropriate, reflect Human Rights issues and/or Indigenous Knowledge.

The cycle of enquiry developed by the Learning Outcomes is:

Learning Outcome 1-

- posing/asking questions of the past
- collecting sources which learners interpret by extracting, organising, analysing, and evaluating relevant information in order to address the question. Relevant sources can be located either by teachers or learners, depending on the context of the enquiry.

Learning Outcome 2-

- using the conceptual framework in historical analysis and interpretation

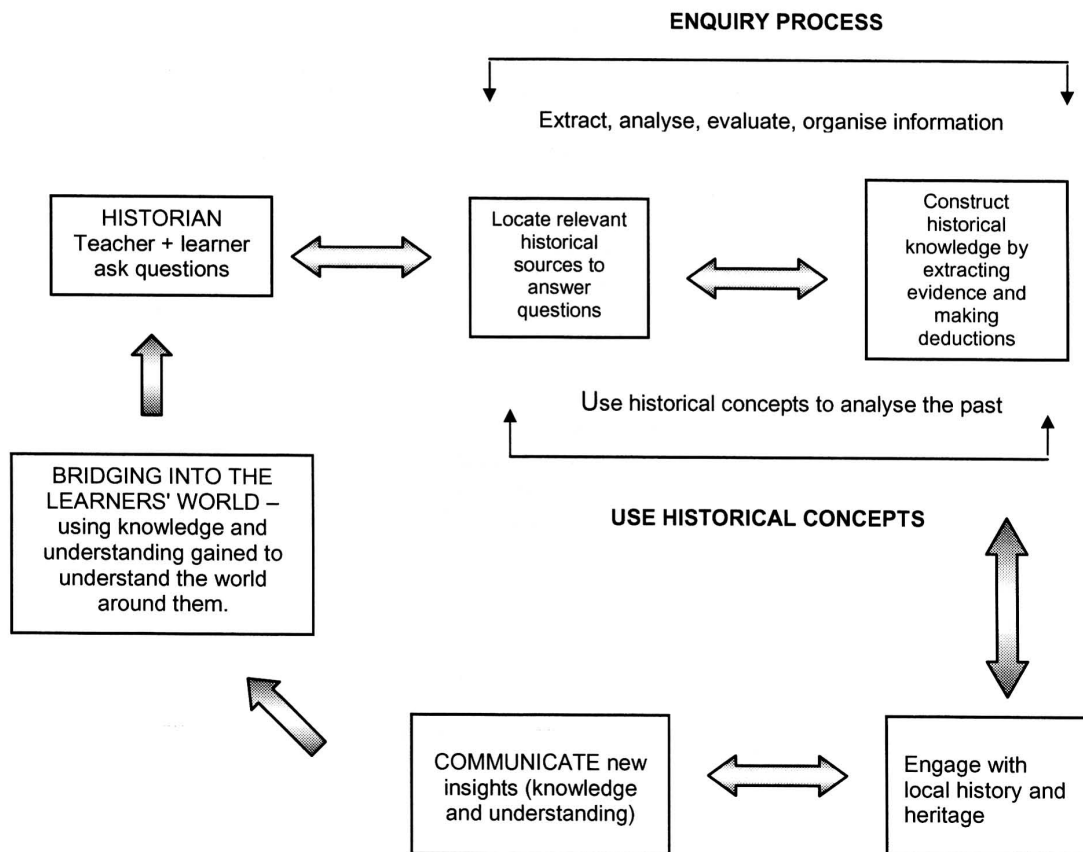
Learning Outcome 3-

- constructing an answer (piece of history) to questions raised based on evidence from the sources
- communicating findings in a logical, systematic manner.

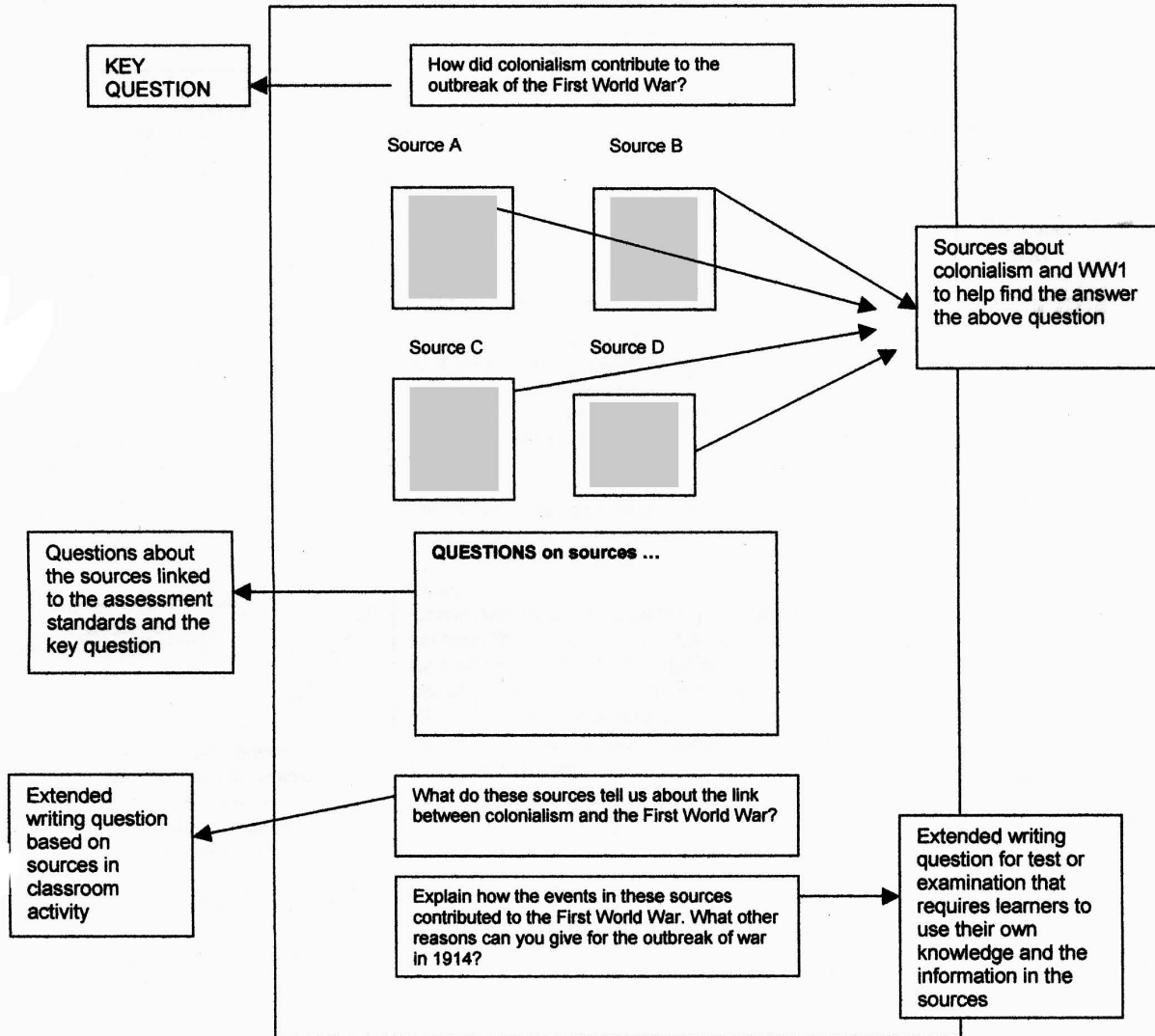
Learning Outcome 4 which focuses on issues of public history and heritage, should be incorporated into the above process whenever appropriate. The first three outcomes will also be applied to heritage investigations. The heritage outcome is particularly suited to investigations and projects, and it is also in this outcome that issues of indigenous knowledge can be explored. In each section, it is also important to help learners to see the relevance of the past in their lives and to the world today i.e. bridging into their world.

The Learning Outcomes and Assessment Standards introduce teachers and learners in South Africa to a vision of history teaching and learning in schools. The first three outcomes develop historical enquiry skills, conceptual understanding and the ability to construct knowledge based on evidence from the past. The fourth outcome engages learners with heritage issues and raises crucial questions of analysis, interpretation and presentation. This outcome must not be seen as a separate component but needs to be closely linked to the other three. The assessment standards related to these outcomes broadly include issues related to human rights and indigenous knowledge systems. The learning outcomes for History in the FET band are the same for all grades. The assessment standards show progression in the development of skills, concepts, knowledge and processes from grade to grade. They describe the expected level of performance and range of performance for each learning outcome for each grade. The performance of learners in the learning outcomes is measured against the assessment standards. Each grade builds on the competences developed in the previous grade.

Fig. 2.3: Diagram illustrating the construction of knowledge in history

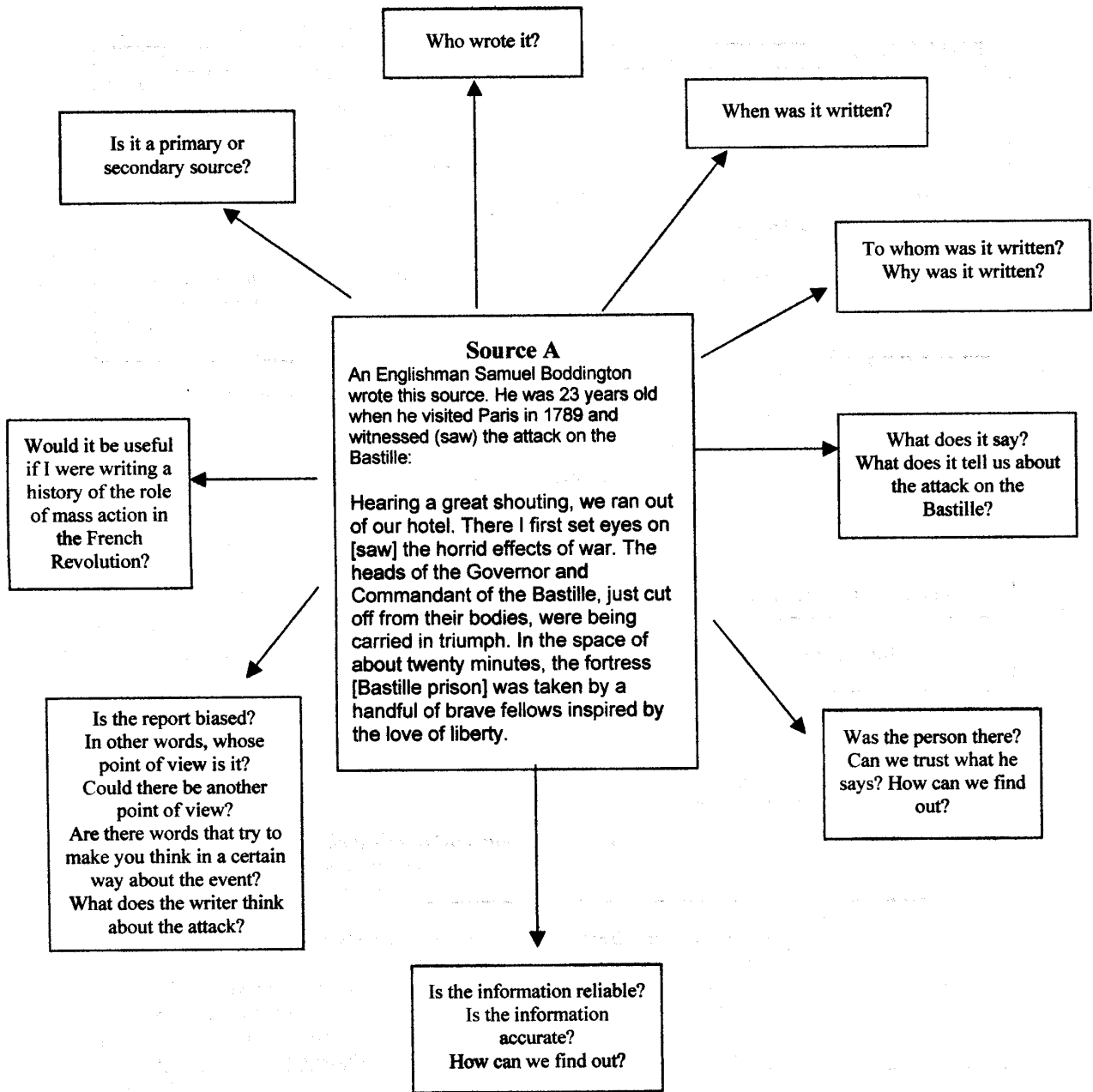


APPENDIX 2: EXAMPLE OF HOW TO DEVELOP SOURCE-BASED QUESTIONS



Note: In examination conditions there will not be time for candidates to answer two extended writing questions. In Grade 10, the extended writing question should be based on the sources and include their own historical knowledge. By Grade 12, the extended writing included in Paper 1 questions must require candidates to use their own knowledge as well as aspects of information from or about the sources.

EXAMPLES OF QUESTIONS TO ASK ABOUT HISTORICAL SOURCES



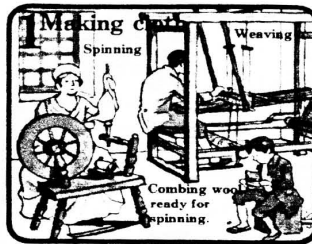
Source 1

Change in working place and style during the Industrial Revolution

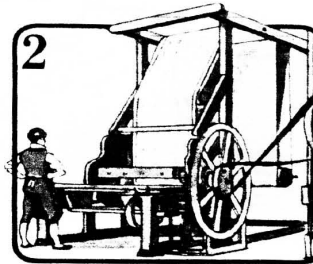
BRITAIN (THE INDUSTRIAL REVOLUTION): AD1750 to AD1850

Machines and Factories

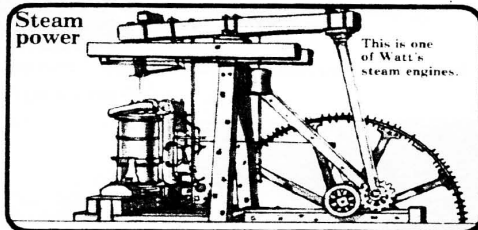
In the first half of the 18th century, most people in Britain still lived and worked in the countryside. Woollen and cotton cloth, produced in the north of England, were the chief manufactured goods. Before 1750 cloth was mainly made by hand, in people's homes. But by 1850 it was being made by machines in factories. The new factories employed lots of people and towns quickly grew up round them. These changes in working life have become known as the "Industrial Revolution".



Britain produced a great deal of woollen cloth. In the first half of the 18th century, most of it was made by villagers in their homes and sold to visiting merchants.

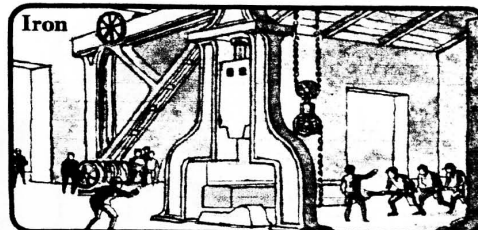


Then machines like this were invented. They helped spinners and weavers to work much faster. Later they were adapted to be driven by water, and later still by steam.



The early factories used water power to make their machines go. Various people experimented with the idea of using steam. Eventually a Scotsman

called James Watt found out how to make steam engines drive the wheels of other machines and these were soon being used in factories.



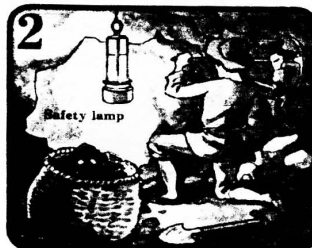
This is an iron works. Iron was needed for making the new machines, but iron-smelting needed charcoal and the wood for making this was in short supply.

Coal was no good as its fumes made the iron brittle. Then, Abraham Darby discovered coal could be turned into coke which was pure enough for making iron.

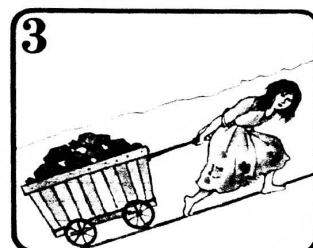


People had been using coal to heat their homes for a long time, but it had been dug only from shallow mines. Deep mines were too dangerous.

4



Several inventions made mining safer. The safety lamp cut down the danger of explosions. Steam pumps helped prevent flooding and there was also a machine which sucked out stale air.



Underground rails made it easier to haul coal to the surface from great depths, but conditions in the mines were still very bad. Small children were used to pull the heavy trucks.

Source 2

The employment of machinery was one of the greatest evils that ever befell the country. (A writer in Britain in the early 1800's)

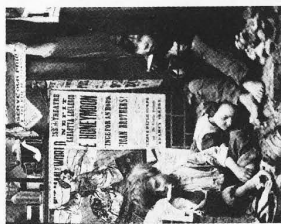
T.K.Derry and T.L. Jarman, 1970

Source 3

A trade union is an organization of workers. Workers form unions to try and improve their working and living conditions.

Making History Grade 10 p. 191

5.2 How did the Industrial Revolution change society?



▲ Poor children make their home in an alley way.

▼ **SOURCE A** This picture of London slums shows the overcrowded and polluted cities. The life expectancy of workers in many cities was about 15 years lower than that of rural workers.

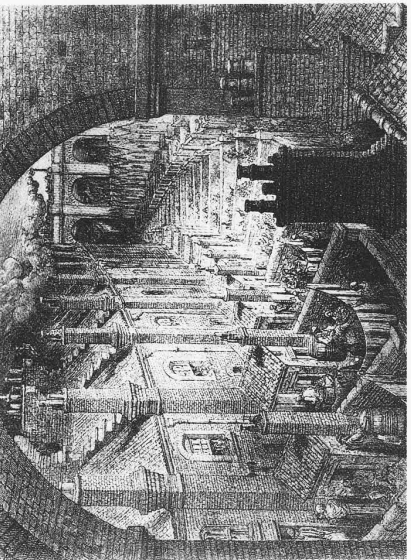


By the end of this unit you should be able to:

- examine the impact of industrialization on working and living conditions
- empathize with the experiences of working people
- understand the links between industrialization and the development of trade unions, civil movements and mass education
- use sources to examine different perspectives and to work out how reliable they are.



Population growth was one of the most dramatic changes affecting Britain during the Industrial Revolution. In just 75 years (between 1775 and 1850) the population of England and Wales grew from 7 million to 18 million. At the beginning of this period most people lived and worked in the countryside. By 1850 more than half the population lived and worked in the towns. This shift from rural to urban areas had profound effects on society. It resulted in new developments, such as trade unions, civil movements and mass education.



What was life like in the new towns?

In the rapidly growing towns, thousands of new houses were built by landlords keen to make profits. As many houses as possible were built on small pieces of land and the cheapest building materials were used. These houses were close together, damp, dark and unhealthy.

Life was difficult in the overcrowded towns. Running water, proper toilets and windows were rare; water supplies were often polluted; refuse was left to rot in streets; and the air was filled with unhealthy factory smoke. As a result, diseases spread easily. Thousands died in cholera, typhoid and other epidemics. The cities were also centres of

crime and, in times of economic depression, of unemployment. But life was not like this in all British cities. Even in the largest city, London (with a population of 2.3 million in 1851), it was possible to reach the surrounding countryside quite easily. Later, factories such as public parks, libraries or sports grounds were built. Although working and living conditions were difficult, the towns created a working class culture that gave people a sense of community and identity. In many ways, city dwellers lived freer lives than people in the countryside (who were often obliged to work at all hours and under the direct control of a landowner).

Why did workers form trade unions?

Even before the Industrial Revolution, skilled workers and craftsmen in parts of Britain had joined together to help each other. Each member paid a subscription into a fund which paid them benefits when they were sick, old or unemployed. These trade clubs, or *combinations*, were usually small and local. Some of them began to organise resistance to employers who broke agreements, and to send petitions to parliament on behalf of their members.

RULES TO BE OBSERVED By the Hands Employed in THIS MILL.

1. All the Overlookers shall be on the premises first and last.
2. Any Person coming too late shall be fined as follows:—for 5 minutes 2d, 10 minutes 4d, and 15 minutes 6d &c.
3. For any Bobbins found on the floor 1d for each Bobbin.
4. For single Drawing, Slubbing, or Roving 2d for each single end.
5. For Waste on the floor 2d.
6. For any Oil wasted or spilled on the floor 2d each offence, besides paying for the value of the Oil.
7. For any broken Bobbins, they shall be paid for according to their value, and if there is any difficulty in ascertaining the guilty party, the same shall be paid for by the whole using such Bobbins.
8. Any person neglecting to oil at the proper times shall be fined 2d.
9. Any person leaving their work and found Talking with any of the other workpeople shall be fined 2d for each offence.
10. For every Oath or insolent language, 3d for the first offence, and if repeated they shall be dismissed.
11. The Machinery shall be swept and cleaned down every meal time.
12. All persons in our employ shall serve Four Weeks' Notice before leaving their employ; but L. WHITTAKER & SONS, shall and will turn any person off without notice being given.
13. If two male persons are known to be in one Necessary together they shall be fined 3d each; and if any Man or Boy go into Women's Necessary he shall be instantly dismissed.
14. Any person wilfully or negligently breaking the Machinery, damaging the Brushes, making too much Waste, &c., they shall pay for the same to its full value.
15. Any person hanging anything on the Gas Pendants will be fined 2d.
16. The Masters would recommend that all their workpeople Wash themselves every morning, but they shall Wash themselves at least twice every week, Monday Morning and Thursday morning; and any found not washed will be fined 3d for each offence.

The Overlookers are strictly enjoined to attend to these Rules, and they will be responsible to the Masters for the Workpeople observing them.

WATER-FOOT MILL, NEAR HASLINGDEN, SEPTEMBER, 1851.

J. Head, Printer and Bookbinder, Haslingden

▲ **SOURCE B** Rules from the Water-foot Mill near Lancaster in 1851.

Did the lives of ordinary working people really improve during the Victorian era?

Student A

During the nineteenth century people were expected to work in very harsh conditions to earn a basic wage. They work in mills and down mines and many often because of the poor conditions. Some people thought this was a bad thing and they decided to pass some laws to make life better for them. Children also benefited from these new laws. People who couldn't work or who were out of work had a hard time as well. They were expected to go to workhouses. They ate very little and were treated badly, but at least they got a roof over the heads.

Finally, laws were passed to make towns cleaner. This had a very widespread effect. Despite all these laws and things, I think life was still really tuff, dont you?

Student B

Life was possibly not as bad as many historians have previously thought for people living and working in workhouses. The reports made by Poor Law commissioners show that workhouses provided health care, basic food and clothing and shelter until the occupants were able to support themselves again financially. For example, at Gressenhall workhouse in Norfolk, people in workhouses were given up to an hour for meal breaks and regular shorter breaks during the working day. Although their diet was simple, they were given meat and fish regularly. Children were also provided with a basic education. However, we have to be careful when looking at the accounts written by workhouses themselves, as often the conditions were a lot more grimmer than they would publish in official reports. It is only by comparing evidence from different sources such as commissioners reports, accounts by novelists and journalists, even songs and letters by inmates, that we can get a full picture.

Student C

In the nineteenth century working conditions for people in agriculture and in industry improved to a certain extent. Laws such as the mines act (1842) and the factory acts (1833, & 1847) were passed in order to improve working conditions. People and politicians were especially concerned about the conditions which children were working under. Before these acts were passed children were exploited as a cheap source of labour. The novelist Elizabeth Gaskell in her book, 'Mary Barton' described the horrors of working in a Manchester cotton mill. Children were expected to work from the early hours of the morning until eight o'clock at night. They had few breaks and were punished severely by overseers if they arrived late or were absent without good reason. Elizabeth Gaskell's novels had a powerful effect upon society, especially the middle-classes, who until then had little or no idea of the horrors of working life for ordinary people. Other things which helped improve the lives of working people were:

- Workhouses
- The Public Health Act
- The Great Reform Act

Activity 4.13: Individual



What does Source 4E tell us about the attitude of nobles to the financial crisis facing France?

Source 4H: This is a cartoon showing the meeting of the Notables. When asked by the president (monkey) which sauce they would like to be eaten with, their response was that they would not like to be eaten all.



How did they react to the financial crisis?

The Finance Ministers who attempted to fix the problem

Turgot introduced strict reforms:

- Did away with forced labour.
- Removed internal trade restrictions.
- Planned to tax all landowners.

His reforms caused an outcry among the nobility and the king was forced to dismiss him.

Necker

Raised huge foreign loans which plunged France into greater debt. He was also dismissed.

He was later recalled by the king.

It was his advice which led to the king summoning the Estates General.

Calonne

He advised the king to summon the Assembly of Notables (a body comprising a class of people distinguished by high birth) to consider his financial reforms.

The rejection of his proposed reforms by the nobles led to his dismissal.

Brienne

He attempted to register his reforms via the Parlement of Paris but the parlement refused to do so.

• ACTIVITY 12 •



The class will be divided into five groups representing the empires of Portugal, Spain, Holland, France and Britain. Look at the map of the world in 1750 on page 93. Each group must either trace the map or draw an enlarged copy of it onto a sheet of cardboard. Using an atlas and the information provided on the map, colour in the outline of your country's position in Europe. Then colour in your country's former colonies or trading stations in the same colour. (Your teacher will tell you what colour to use.) Neatly label the names of the modern countries coloured in on your map.

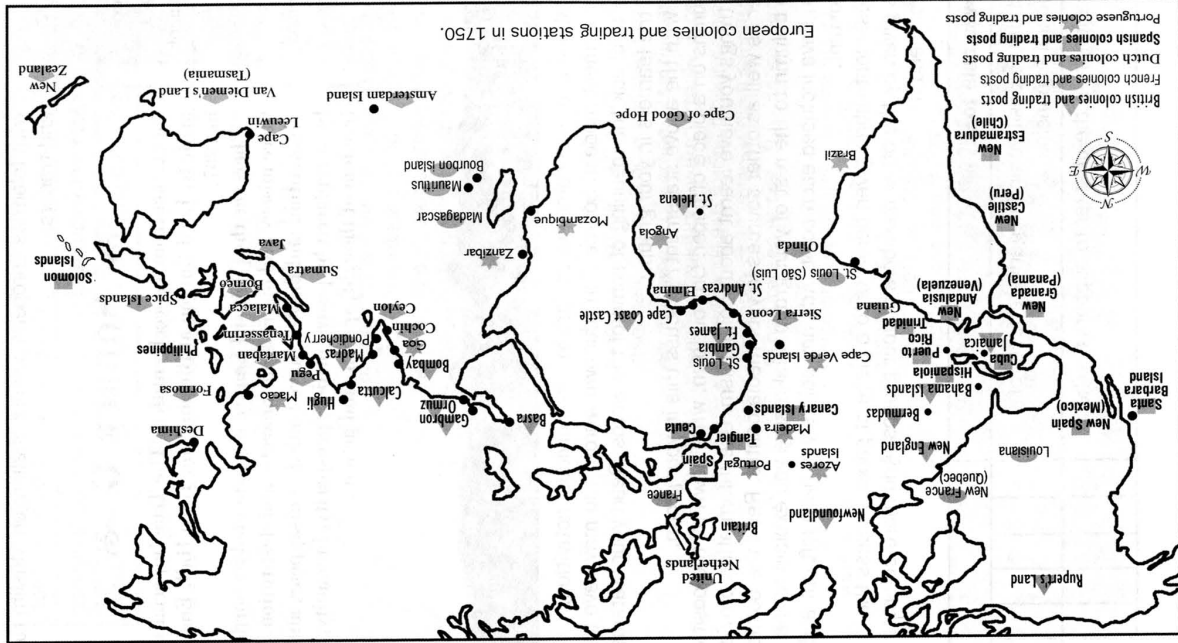
When this task is completed, pin up or paste your map onto the classroom wall. Then your group must point out to the rest of the class the former colonies of the country you represent. Indicate where your country took colonies away from other European countries.

Use this grid to assess the work of the other groups:

The group ...	No	Yes
could draw a map of the world		
could neatly colour in the outline of the country's colonial empire		
could clearly identify and label the modern countries that were former colonies of the colonial power		
could explain how the empire they represent lost land to, or gained land from, another colonial power		
worked together well as a group		

6.6 What was the effect of colonialism?

- Colonial empires became rich and powerful as their empires grew in size. However, colonies were expensive to run, especially if wars were involved. Wars were fought between rival empires who wanted the same land or to defeat rebellious indigenous inhabitants.
- Europe, in particular Britain, was able to industrialise because of raw materials obtained from colonies and because colonies provided markets for manufactured goods.
- Slavery did not start because of colonialism; slavery has always existed. However, European powers were able to exploit their colonies and increase their wealth by using slave labour or very cheap indigenous labour.



- Colonialism did not cause racism, but it helped to reinforce the belief that Europeans were the dominant race and therefore superior and that other races were subordinate and therefore inferior. On the other hand, colonialism provided opportunities for people of different races, religions and cultures to meet, live and work together. The result of this has been an exchange of ideas, technology and traditions. The spread of Christianity throughout the world through missionary activities and the expansion of European colonial empires. Church and state worked together to change the indigenous belief systems of the people they ruled. Christianity also came into conflict

QUESTION 3: THE INDUSTRIAL REVOLUTION

WHAT WERE THE CONDITIONS OF THE WORKING CLASS IN BRITAIN DURING THE INDUSTRIAL REVOLUTION?

Use sources 3A, 3B and 3C to answer the following questions:

- 3.1 Read through Source 3A.
- (a) Describe the conditions of the house in which the children lived. (2 x 1) (2)
- (b) What do you learn about the children from the line: 'Their clothes were mere bunches of rags kept together by strings'? (1 x 2) (2)
- 3.2 What evidence is there in Source 3A which indicates that the children did not receive schooling? Give TWO examples. (2 x 2) (4)
- 3.3 Comment on the appropriateness of the title 'Ignorance'. (2 x 2) (4)
- 3.4 Refer to Source 3B.
- (a) What message does this source convey? (1 x 2) (2)
- (b) Why do you think child labour was used? (1 x 2) (2)
- 3.5 Read carefully through Source 3C. This source lists the occupants of five houses in Cherry Tree Yard. Copy the table below in you answer book, choose two houses and write the information you can find in the census about the occupants under the following headings:

House address	Family structure	Occupations	Economic status

(2 x 3) (6)

- 3.6 What additional information do Sources 3A and 3B provide about family life and children that Source 3C does not provide? (2 x 2) (4)
- 3.7 Explain what these sources tell us about the control that employers had over children during the Industrial Revolution. (2 x 2) (4)

History

8
NSC

- 3.8 During the Industrial Revolution officers were appointed by the local councils to report on the living conditions of poor people in the district.

In the light of this statement, discuss the social and economic conditions in Leeds during the Industrial Revolution.

(20)

OR

- 3.9 Describe the conditions of the working class, including children, in Britain during the Industrial Revolution.

Use the relevant information in these sources, and your own knowledge to support your argument.

(20)
[50]

QUESTION 3: THE INDUSTRIAL REVOLUTION**WHAT WERE THE CONDITIONS OF THE WORKING CLASS IN BRITAIN DURING THE INDUSTRIAL REVOLUTION?****SOURCE 3A**

Angus Bethune Reach, who wrote this article, was an investigative journalist with the British newspaper, *Morning Chronicle*, in the 1840s. The case study is of Leeds, a growing industrial city in England, in 1849.

Case Study 2: Ignorance

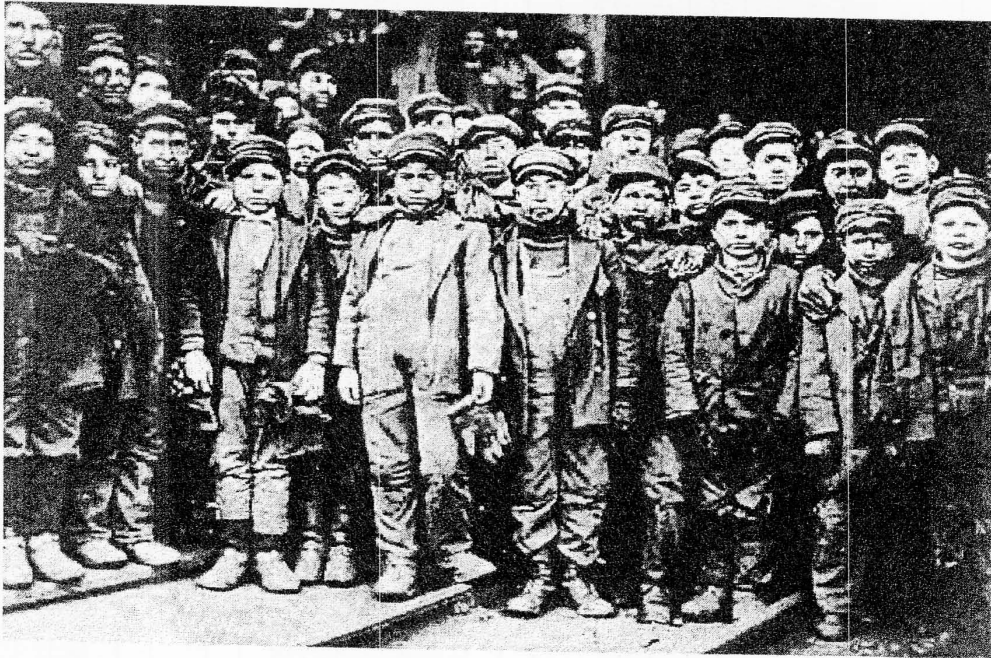
In another house, very close to the last, I found three children left alone but in idleness (with nothing to do). The place was a mess of filth; the scanty (very little) furniture broken, and flung carelessly about – the unmade bed of brown rags - cracked and handleless cups, smeared with coffee grounds, on the floor, amid unemptied slops (dirty water and other kitchen waste) and beside a large brown dish, full of fermenting dough, upon which dust and ashes were rapidly settling as it stood at the fireside. The uncleaned window and the dim light of a winter's afternoon made the place so dark that it was with difficulty I made out these details. There were here three little savages of children – their hair tangled in filthy, clotted masses hanging over their grimy (very dirty) faces. Their clothes were mere bunches of rags, kept together by strings. A wriggle of their shoulders, and they would be free from all such incumbrances (danger) in a moment.

I asked them if they ever went to school. – 'Never'. 'Can you tell your letters?' (Can you read?) – a mere solid stare of ignorance. 'How old are you?' I asked the eldest girl. 'Don't know.' 'Do you know, what is the Queen's name?' – 'No'. 'Where were you born?' – 'Don't know.' The relieving officer (official) said that he believed all the family were Irish. 'Did you ever hear of a place called Ireland?' – 'No'. 'Or of a place called England?' – 'No.' 'Or of a place called Yorkshire?' – 'No.' 'Do you know the name of this town?'

After a pause, the question was answered. The eldest girl did know she lived in Leeds; and this knowledge, with the exception of matters belonging to the daily routine of existence, seemed positively to be the only piece of information in the possession of the family...

SOURCE 3B

This photograph shows some of the child labour that was used in mines and factories during the Industrial Revolution in Britain. These were probably young boys from the mines.



SOURCE 3C

This is an extract from a census carried out in Leeds in 1851. A census is a count of all the people in a country on a certain day. On the form 'do' means 'ditto' or the same as the person above that is same name, or from the same place. 'U' means unmarried.

Street name and number	Name and surname of each Person in the house on the	Relation to head of family	Condition	Age of Male	Female	Rank, Profession, or Occupation	Where Born
7 Cherry Tree Yard	Patrick O'Donnell	Head	Married	24	23	Hardware Hawker [sells goods]	Ireland
	Bridget do	Wife	do				do
	John do	Son		6 months			Yorkshire, Leeds
	Mary Jackson	Mother-in-law	Widow		49	Midwife	Ireland
	George do	Brother-in-law	U	14	50	Flax Dresser [works with flax making linen cloth]	do
	Bridget Larkin	Lodger	Widow		23	Beggar	do
	Ann do	do	U			do	do
	Michael do	do	U	14		Flax Dresser	do
	Joshua Heselwood	Head	Married	77		Pauper [very poor, getting some money from the parish] - Farm Labourer	Yorkshire, Morley
	Jane do	Wife	do		76	do	do Newton upon Cuse
	William Grayson	Son-in-law	do	27		General Labourer	do Leeds.
	Hannah do	Daughter	do		25	Card Spinner [prepares cotton for spinning]	do do
10 Cherry Tree Yard	John Ackroyd	Head	do	36	35	Shoemaker	do Haworth
	Margaret do	Wife	do				do Olley
	John do	Son		9		Scholar	do Bradford
	Mary Ann do	Daughter			7	do	Durham Darlington
	Thomas do	Son		5		do	Yorkshire Bradford
	Hannah do	Daughter			3	do	Durham, South Shields
14 Cherry Tree Yard	Agnes Connor	Head	Widow		60	Charwoman	Scotland
	Ellen do	Daughter	U		30	Flax Spinner	Cumberland Wrigton
	Edward do	Son	U	26		Engine Tenter [works with machines for stretching cloth]	Yorkshire Leeds
	James do	Son	U	20		Cloth Dresser [prepares material]	do do
18 Cherry Tree Yard	John do	Son	U	16		do do	do do
	Charles Pritchard	Head	Married	50	40	Pauper Dyer [dyes cloth]	Ireland
	Elizabeth do	Wife	do				do do
	John do	Son	U	23		Bricklayer Labourer	do do

13/09/2016

Secondary School

September Controlled Test

Surname: _____

Name: _____

Grade: 10D

History

$$30 + 18 = \frac{48}{50} \quad 96\%$$

1.1. a) The house was untidy and dirty. ~~The~~ home was not cleaned thus resulting in an unhygienic and unhealthy environment. (2)

b) The family was poor and the children were uncared for as their parents had to work // (2)

1.2 "I asked them if they ever went to school - Never" // (2)

"Can you tell your letters? (Can you read) - a mere solid stare of ignorance" // (2)

1.3 It is appropriate as the article speaks of ignorant people. The children in the article are uneducated and don't know the essential things in life, and are ignorant. (4)

1.4 a) It says that children had to work and had to live in terrible conditions. This picture shows what the people of Britain went through. // (2)

b) It was used as a means of survival. Children have to work as adults get paid too less and could not support their families. // (2)

2018 = $\frac{38}{50}$ = 76%

SECONDARY SCHOOL

September Controlled Test

Surname :

Reg No. : 24

Name :

Grade : 10⁰

HISTORY

QUESTION ONE

a) The place was a mess of filth; the scanty ~~every little~~ ⁽³⁾ furniture broken, and flung carelessly about - the unmade bed of brown rags cracked and handleless cups, smeared with coffee grounds, on the floor, amid unemptied slops (dirty water and other kitchen waste) and besides a large brown dish full of fermenting dough, upon which the dust and ashes were rapidly settling as it stood at the fireplace.

b) I think it means that they ~~clothes~~ ⁽²⁾ were old, torn and dirty which made it seem as though they were rags kept together ^{by} as string.

2 B The officer asked the children if they have ~~ever~~ attended school and said never ~~to~~ and when I asked if they knew their letters they said No they said no to every questions they were asked and only knew the place they lived in nothing else these ~~childrens~~ were not well informed. ⁽⁴⁾

3 The childrens stared of ignorance meaning they ~~looked at~~ ⁽²⁾ him as though he was made, and wondered what he was talking about since they knew nothing ⁽²⁾