

# RECOGNISING THE ACADEMIC AND POLITICAL PURPOSES EMBEDDED IN HISTORY TEXTBOOK ASSESSMENT TASKS

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## ***Abstract***

*This paper explores the nature of history as a school-based discipline and how history is recontextualised in the South African History Curriculum and Assessment Policy Statement (CAPS) and Grade 10 history textbooks, with a particular focus on what the assessment activities and questions require of learners. The conceptual tools used in this document analysis were inspired by Morgan and Henning (2013) and came from Wertsch (2002), Anderson (2005) and Krathwohl (2002). The findings indicate that within the 'doing school history' construct, there is both an academic and a political dimension. These two projects may appear to be at odds with one another, but we argue that the study of history is strengthened when both are given their due respect.*

**Keywords:** Knowing history; Doing history; History textbook assessment tasks; Source-based tasks; Academic project; Political project; Collective memory; Historical thinking.

## **Introduction**

Paxton (1999) states that learners are often constrained in their understanding of history by the parameters of assignments or assessment tasks embedded in history textbooks. This paper explores how the assessment tasks and answer guidelines in Grade 10 history textbooks enable and constrain learners' access to understanding the discipline of history. To expose the issues, the literature review explores two sets of distinctions – between learning the “facts of history” compared to the “unique skills of history” (Osborne, 2004) on the one hand, and between the “academic” and “political / citizenship” projects embedded in school history on the other (Wertsch, 2002). The data presented

shows that both general academic and uniquely historical skills are developed through the assessment activities that students are expected to complete and moves on to analyse the weighting given to the academic and political projects respectively. In the discussion, we reflect on the tensions generated by the need for the tasks in history textbooks to fulfil such different demands. We conclude by making a case for balancing the academic and the political / citizenship projects, so that both can be strong.

### **Literature review: Conflicting purposes for school history in the field of recontextualisation**

Disciplinary knowledge is generated in what Bernstein (2002) calls “the field of production” at universities and research institutes. Before it is taught in schools, which make up “the field of reproduction”, the knowledge undergoes a process of transformation in “the field of recontextualization”. The field of recontextualisation consists of politicians, education policy-makers, curriculum developers, publishers, textbook writers, assessment processes, etc., whose responsibility it is to reorganise disciplinary knowledge into school curricula and textbooks for teaching purposes.

The content, skills and political agenda presented in curricula need to be exemplified in textbooks (Osborne, 2004:28). Most teachers and learners assume that textbooks authentically recontextualise that which is in the curriculum, and many believe uncritically in the worth of textbooks as helpful foundations for teaching and learning (Osborne, 2004:28). Textbooks clearly serve a central role in the history classroom, whether they validly reflect the paradigm of history as stated in the curriculum or not (Paxton, 1999:327). In the South African educational context this is particularly true “where many teachers [and learners] have no access to any other media or subject knowledge” (Morgan & Henning, 2011:169). Quoted in Morgan and Henning (2011) the South African Minister of Education in 2009 stated that, “history textbooks cannot but remain central to the cause of an improved history education”. Therefore, any study of South African history textbooks needs to investigate in what ways the textbooks create opportunities for learners to know and do history and whether the nature of the political project supports the academic project.

### ***Differing academic perspectives on school history***

In the field of production there is an ongoing debate about the nature of historical writing. Traditionally, positivists believed that the more historical facts collected, the more real a picture of what happened in the past could be presented. They assumed that facts need to be learned and that they stand apart from the historian and speak for themselves to objectively portray the past. In reaction, empirical-reconstructionists like Carr (1961) argued that history is an empirical-analytical undertaking, with historians as selectors and interpreters of historical facts to build an understanding of the past. In contrast, post-modernists insist that history is a literary artefact (Munslow, 2011), i.e. a complex narrative discourse, moulded by the rhetoric, metaphors and ideological strategies of explanation employed by the historian. As such, “... history is as much invented as it is found” (Munslow, 2011:9). While the field of production has generally rejected the positivist tradition, the debate between history as an empirical reconstruction vs. history as a literary artefact has continued.

In the field of recontextualisation the debate has taken a slightly different form. The “knowing history” approach has maintained a presence in curricula and textbooks, while simultaneously both empirical-reconstructionist and post-modernist approaches have foregrounded and influenced a “doing history” approach. Bertram (2008) contrasts the focus on knowing history as a chronologically ordered narrative of past events which pupils needed to internalise (2008:156), with the focus on doing history, which sees history as a vehicle for the teaching of critical literacy and developing the skills of historical enquiry (2008:157).

The doing history approach emphasises constructivist modes of engagement with the past, with a focus on understanding perspective and engaging with certain historical skills (Bertram, 2008:156-157). Doing history should bring students to so-called historical ways of thinking that include critical reading and interpretation of source material, the identification of bias and the practice of inquiry skills (Bertram, 2008:157). Osborne (2004) identifies unique historical skills that are foregrounded in the doing history approach, such as: “...the ability to work with historical data, to interpret and evaluate primary and secondary sources, to analyse historical arguments and narratives, to evaluate the credibility of data, to assess historical significance, to empathise with people in the past, to understand the ways in which the past differs from the present, to use historical knowledge to explore contemporary problems,

and the like” (Osborne, 2004:5).

These unique skills are also described by Seixas (1999) and Barton and Levstick (2003). They emphasise how important it is for learners to understand how history is constructed. This is achieved through historical investigations that stress both primary and secondary source analysis, point out the relationships between historical evidence and constructed historical accounts, present an understanding of multiple perspectives that are often divergent in nature, and enable an appreciation of how people in the past held differing outlooks on events than we have today (Barton & Levstick, 2003:359).

Doing school history should not mean a rejection of the need to know historical knowledge, chronology and explanation (Bertram, 2008). Seixas (1999), drawing on Shulman (1987), describes a symbiotic relationship between content and skills. It is an ability to work with historical content and skills that forms the core of what it means to do history and makes up its academic project.

### *Differing political perspectives on school history*

In addition, the field of recontextualisation is concerned with a debate about which political perspective on history should be emphasised. In the South African context, Morgan (2010) emphasises how curriculum policy places a dual purpose on school history: an academic project promoting the skills of historical enquiry, as well as a political project of citizenship education that unlocks the potential of learners to influence the societies in which they live. Writing in a Canadian context, Osborne (2004:7) stresses the underlying nationalistic goals of school history curricula that strive to instil in learners a sense of national identity, while simultaneously encouraging, often through debate, an appreciation of the multi-cultural nature of society. The importance of citizenship education as a purpose of school history is also highlighted by the American scholar Paxton (1999), who argues that the field of recontextualisation imposes a political agenda on the teaching of school history (1999:325). Thornton and Barton (2010:2472) show how school history curricula have been a target of politicians and other pressure groups who seek to revise curricula to support certain political projects of the day. These political imperatives are then transferred onto textbook writers and publishers. For Paxton (1999:325), the danger is that the academic purpose of the discipline of history and history textbooks can take a back seat to a history

designed to transmit ideas related to a political agenda, be it patriotism, the benefits of democracy, or more exclusionist goals.

### ***The current South African History Curriculum***

The FET (Further Education and Training) History CAPS (Curriculum and Assessment Policy Statement) (2011:8) explicitly mentions both the political and the academic projects. The political project emphasises citizenship within a democracy that upholds the values of the constitution, respects the perspectives of a broad spectrum of society, encourages civic and environmental responsibility, promotes human rights and peace, and prepares young people for local, regional, national, continental and global responsibility. The academic project consists of eight skills of history that emphasise history as a process of enquiry. They are: understanding a range of sources, extracting and interpreting information, evaluating the usefulness and reliability of sources, recognising more than one perspective, explaining why different interpretations exist, participating in constructive and focused debates, organising evidence to substantiate arguments, and engaging critically with issues of heritage (2011:8-9). The academic project thus requires learners to strive for an understanding of content knowledge and skills. Next is an explanation of key historical concepts that learners must understand: historical sources and evidence, multi-perspectivity, cause and effect, change and continuity, and time and chronology (2011:10), which also fit in with the academic project.

Later in the document (2011:33) a table is provided to highlight the cognitive levels and abilities that need to be covered during formal source-based assessments. These cognitive levels emphasise that all assessment tasks should assess both “doing” and “knowing” history (2011:32), so that learners can display their ability to select, arrange and connect evidence to solve historical problems. These are:

**Table 1: Cognitive levels of source-based assessment questions (History CAPS, 2011:33)**

Cognitive Levels	Source-based assessment questions and tasks
LEVEL 1	<ul style="list-style-type: none"> <li>• Extract evidence from sources</li> </ul>
LEVEL 2	<ul style="list-style-type: none"> <li>• Explain historical concepts</li> <li>• Straightforward interpretation of the sources</li> <li>• What is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source?</li> <li>• Compare information in sources</li> </ul>
LEVEL 3	<ul style="list-style-type: none"> <li>• Interpret and evaluate information and data from sources</li> <li>• Engage with questions of bias, reliability and usefulness of sources</li> <li>• Compare and contrast interpretations and perspectives within sources and by authors of sources</li> </ul>

CAPS thus emphasises history as a study of processes of change and development over time, to be conducted in a “disciplined” (2011:8) way because an understanding and appreciation of history can only be developed through a process of enquiry using the skills of history, coupled with an understanding of historical concepts, and the knowledge of how to use historical sources of evidence. In contrast to Curriculum 2005, the History CAPS has sought to re-impose the disciplinary nature of history as a subject within schools through a re-emphasis on content knowledge within the “doing history” approach. Yet the History CAPS makes little effort to show how the political project and the academic project are integrated. Each aspect of doing school history is neatly listed and compartmentalised, but the details of the integration and where to place the emphasis, is relegated to the textbook writers. By offering no criteria or examples of what it might mean to “engage critically with issues of heritage” or “engage with questions of bias, reliability and usefulness of sources”, it provides little guidance regarding, for example, what is considered to be a reliable or unreliable source, a biased or a well-reasoned source, or a valid or invalid interpretation of sources.

***The distinction offered by Wertsch***

Wertsch (2002) offers a useful distinction for understanding that the perceived clash between political and academic projects need not be inevitable and that there are criteria for what is an appropriate political perspective. He achieves this through an analysis of modes of historical thinking.

**Table 2: Modes of historical thinking (Wertsch, 2002:4)**

<b>Modes of Historical Thinking (Wertsch 2002)</b>	
<b>Collective memory</b>	<b>History</b>
“Subjective”	“Objective”
Single committed perspective Reflects a particular group’s social framework Unself-conscious Impatient with ambiguity about motives and the interpretation of events	Distanced from any particular perspective Reflects no particular social framework Critical, reflective stance Recognises ambiguity
Focus on stable, unchanging group essence	Focus on transformation
Denial of “pastness of events” Links the past with the present Ahistorical, anti-historical	Focus on historicity Differentiates past from the present Views past events as taking place “then and not now”
Commemorative voice Museum as a temple Unquestionable heroic narratives	Historical voice Museum as a forum Disagreement, change, and controversy as part of on-going historical interpretation

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

On the other hand, texts that promote historical thinking are “objective”, i.e. historical thinking acknowledges a multitude of perspectives, not just one subjective “reality” (Wertsch, 2002:e-book ref.635). This historical voice clearly differentiates between the past and present, and sees historical thought as characterised by disagreement, change and controversy (Wertsch, 2002:e-book ref.649). Wertsch’s “history” category emphasises multi-perspectivity and aligns strongly with the academic project of doing history. It can also align with the political project of the South African history curricula of the past decade, as Bertram (2008:173) points out: the FET History National Curriculum Statement (NCS) provided history with the political

project of promoting non-discrimination and encouraging learners to debate and grapple with a broad range of social and environmental issues.

Wertsch (2002) makes it possible to see how different modes of historical thinking stand in a different relationship to the academic project. When textbooks promote a collective memory perspective, the required academic skills are limited to rote learning about the past from a prescribed perspective that contains heroic or commemorative narratives, and there is no need to understand what forces influence change and continuity over time, nor to deal with ambiguity, nor to consciously interpret events. In that case, the political project works against the academic project of reasoned argument in a society of multiple perspectives. Yet when textbooks promote historical thinking, the ability of a learner to understand multi-perspectivity as a concept and to recognise more than one perspective is an important step towards developing the good citizenship characteristic of respecting the perspectives of a broad spectrum of society. Learning to differentiate between what happened in the past and what are the possibilities in the present for the future, or how to reason a particular interpretation of events while acknowledging the presence of alternative interpretations, requires the higher level cognitive skills as described in Table 6 below. When school history is planned and enacted from historical thinking, it can be a vehicle both for the promotion of human rights and democracy, and for the development of key academic skills (Morgan, 2010:302). In this way, the academic and political projects can be successfully and meaningfully integrated to achieve the goals of school history.

### **Methodology: Constructing a conceptual lens for analysis**

In this section we briefly present the data sources, and then provide detail on the conceptual lens through which we analysed the assessment tasks. Thirdly, we show how the conceptual lens was made operational in order to extrapolate the key findings related to the academic and political projects of the doing school history construct.

#### ***Data sources***

We conducted a document analysis of the CAPS history curriculum and three of the four nationally prescribed history textbooks for Grade 10. The fourth was unavailable in bookshops at the time of the research.

**Table 3: Sources of data for the study**

<b>History CAPS Document, Grade 10, 2011</b> (Department of Basic Education)
<b><i>In Search of History, Grade 10.</i></b> J Bottaro, P Visser, N Worden. 2011. Oxford University Press + <b>Teacher's Guide</b> (same authors).
<b><i>Focus History, Grade 10.</i></b> B Johanneson, M Fernandez, B Roberts, M Jacobs, Y Seleti. 2011. Maskew Miller Longman + <b>Teacher Guide's</b> (same authors).
<b><i>Viva History Textbook, Grade 10.</i></b> KL Angier, JT Hobbs, EA Horner, RL Mowatt, G Natrass, JA Wallace. 2011. Vivlia Publishers and Booksellers + <b>Teacher Guide</b> (same authors).

We narrowed the content focus to chapters on *European expansion and conquest in the 15<sup>th</sup> to 18<sup>th</sup> centuries*. This chapter was chosen as an example of a strong version of both the academic and political projects: academically, it relies on the analysis of a wide range of source documents, and politically, it upturns a perspective on colonisation that was predominant prior to democracy in South Africa. Yet it is a small sample – so the findings cannot be used to generalise across other history textbooks by the same publishers or even across other topic areas within the sampled textbooks (Pingel, 1999).

The table below indicates the number of pages the *European expansion* chapters occupy in each textbook relative to the other content topics.

**Table 4: Number of pages for the *European Expansion* chapters**

GRADE 10	Overview of History topics (CAPS, 2011:12)	Oxford	Focus	Viva
Topic no.	Topic Title	Pgs. per topic	Pgs. per topic	Pgs. per topic
1	The world around 1600	26	24	42
2	Expansion and conquest during the 15th -18th centuries	27	33	56
3	The French Revolution	34	47	46
4	Transformations in southern Africa after 1750	28	40	65
5	Colonial Expansion after 1750	23	47	43
6	The South African War and Union	32	43	65

According to the statistics presented in the table above, for both *Focus History Grade 10* and *Oxford History Grade 10* the “Early European Expansion and Colonisation” chapters are at the lower end of page numbers, while for *Viva History Grade 10* it is one of the longer chapters. This could provide us with an indication of the relative importance ascribed to the chapter in the eyes of the different textbook publishers.

The next table indicates the number of activities and individual questions analysed. Each activity was made up of a number of individual questions.

**Table 5: Activities and questions per *European expansion and conquest* chapter in each textbook**

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

The tasks analysed were predominantly source-based and were placed throughout the chapters to provide regular assessment opportunities for learners.

### ***Conceptual lens for analysis***

The analytical lens was provided by Morgan and Henning's (2013) five-dimensional tool for analysing history textbooks: making own/personal historical knowledge (A), learning empathy (B), positioning a textual community (C), fashioning stories (D), and how form, space, design and composition of the textbook orientate the reader (E). As this study specifically analysed how the historical knowledge and skills required by the textbook assessment tasks and accompanying answers in the Teacher Guides mediated the academic and political projects, we used only dimensions A and C. Dimension A (Morgan & Henning, 2013:53) is concerned with how texts mediate (and in this case, whether assessment tasks require) analytical skills that allow learners to 'own' and produce historical knowledge (rather than simple rote learning), and how they increase the capacity of learners to use these established skills, i.e. the academic project. Dimension C (Morgan & Henning, 2013:56) focuses on textbooks as agents of social action that deliberately create uses for the past in the present i.e. the political project. It assumes that textbook authors write from a certain ideological disposition, which positions teachers and learners in a certain way, and Dimension C highlights the need to uncover what this disposition is. This is important because, as Loewen (2007) points out, "even if they do not learn much history from their textbooks, students are affected by the book's slant" (2007:344).

Additional textbook assessment task analysis tools were required to create a finer grading of Morgan and Henning's dimensions. For Dimension A, we drew on Bloom's Revised Taxonomy (2005) in conjunction with the History CAPS cognitive levels for assessment and key historical concepts (Grade 10

History CAPS, pp. 10 and 33). The assumption was that if tasks required learners to answer analytical, synthesising and creating questions, learners were more likely to arrive at a skill level which enabled them to “own” their understanding of history. For Dimension C, we followed Morgan and Henning by drawing on Wertsch’s (2002) Table of Collective Memory and History, in conjunction with the descriptions in the History CAPS that espouse the political project.

### *The academic project*

Morgan and Henning’s Dimension A was operationalised by coding the historical conceptual knowledge focus of each assessment task heading, as well as the cognitive skill level of each question in each assessment activity. We decided to work with both the CAPS cognitive level descriptors and the Revised Bloom’s Taxonomy, as jointly they provided a more nuanced tool for analysis. This was done across each of the three Grade 10 *European Expansion* chapters.

**Table 6: Correlating the levels of cognitive skills required by the CAPS and the Revised Bloom’s Taxonomy (Krathwohl, 2002; Anderson, 2005) to use for coding the assessment tasks in the Grade 10 *European Expansion* chapters**

CAPS Cognitive Levels	CAPS Cognitive level descriptors for source-based assessment questions and tasks (p. 33)	Revised Bloom’s Taxonomy levels	CAPS Weighting (Grade 10)
LEVEL 1 (L1)	<ul style="list-style-type: none"> <li>Extract evidence from sources</li> </ul>	<b>Level 1 (Remember)</b> Recognising, Recalling	40%
LEVEL 2 (L2)	<ul style="list-style-type: none"> <li>Explain historical concepts</li> <li>Straightforward interpretation of the sources</li> <li>What is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source?</li> <li>Compare information in sources</li> </ul>	<b>Level 2 (Understand)</b> Interpret, highlight, classify, summarise, imply, compare, explain  <b>Level 3 (Apply)</b> Executing, Implement	40%

<p><b>LEVEL 3 (L3)</b></p>	<ul style="list-style-type: none"> <li>• Interpret and evaluate information and data from sources</li> <li>• Engage with questions of bias, reliability and usefulness of sources</li> <li>• Compare and contrast interpretations and perspectives within sources and by authors of sources</li> </ul>	<p><b>Level 4 (Analyse)</b> Differentiate, organise, attribute</p> <p><b>Level 5 (Evaluate)</b> Check, critique</p> <p><b>Level 6 (Create)</b> Generate, plan, produce</p>	<p>20%</p>
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Using the table above, we coded the cognitive skill required for each assessment activity by allocating each question to a level. It is interesting to note that while the *creation* of “an original, coherent and balanced piece of historical writing” (Department of Basic Education, 2011:9) is demanded of learners in the eight skills of history (a skill echoed by other theorists of the *doing history* approach), this skill does not appear in any of the three cognitive levels for formal assessment outlined on page 33 of the History CAPS (2011) document. This is unusual, because source-based tasks (which most of the activities were) generally require learners to create concise, substantiated arguments, particularly when prompted by questions that ask for an evaluation of issues raised in a source or an evaluation of the usefulness or reliability of the source itself. It appears that the CAPS cognitive levels were constructed in conjunction with the original Bloom’s Taxonomy; hence there is no specific mention of learners needing to use evidence to generate and argue their own point of view. However, our comparison in Table 6 above shows that if learners use CAPS level 3 skills to create an answer that requires them to argue a point based on evidence provided, it means they will also be working at Revised Bloom’s level 6.

Within the Revised Bloom’s Taxonomy, Krathwohl (2002) also highlights knowledge dimensions evident in subject disciplines. However, we did not use the knowledge dimensions for analysis, as historical knowledge is primarily concerned with factual and conceptual knowledge, and these are often used in an integrated manner. It is therefore not valuable to distinguish between them as far as assessment activities are concerned. Yet, what is of value as far as history assessment tasks are concerned, are the historical concepts as developed by historians and outlined by the CAPS (2011:10). This involved specifying the historical conceptual focus of each assessment activity heading, to determine which concepts were promoted by the textbooks in the *European Expansion* chapters and how these aligned with the key historical concepts specified by CAPS.

Here is an example of how we coded assessment task headings in order to determine the historical conceptual knowledge focus.

**Table 7: An example of coding activity headings**

Activity	Assessment activity heading	Historical concept	Explanation
<i>Focus History:</i> Activity 8, p. 55	Extracting and interpreting information about the impact of colonisation on indigenous societies	Effect / Consequence	Emphasis on key concept of historical change or consequences caused by certain actions in history

### *The Political Project*

Morgan and Henning's Dimension C is concerned with how textbook authors see their audience, i.e. how they expect their readers to respond to what is presented as the purpose and nature of school history. When history curricula or textbook authors view the past as something to be used for specific purposes in the present, be it to re-inforce contemporary power relations in society or to reflect more 'acceptable' historiographies, the implication is that they view their readers as uncritical thinkers ripe for ideological manipulation, with the consequence that the intellectual value of history is undermined. When history curricula or textbook authors view history as a means for portraying the complexities of multiple perspectives, disagreement, change, controversy and power relations over time, the implication is that they view their readers as being able to become critical thinkers with an ability to question and a respect for alternative perspectives. Wertsch's (2002) distinction between Collective Memory and History provided a useful tool of analysis to operationalise Morgan and Henning's Dimension C, so we used Table 2 as presented above.

For Dimension C, it was insufficient to look at the assessment tasks in the textbooks for learners; we also needed to analyse the answer guidelines provided in the teacher guides, as well as the general texts and sources attached to activities in the learner books. It was here that we were better able to see where textbook authors mainly sought to embed and transmit, implicitly or explicitly, a particular political message through a pre-determined dominant historical narrative.

We classified questions, assessment tasks and accompanying answer guidelines as having a strong political use of history (Wertsch's "collective memory" category) whenever there was prevalence of subjectivity, or impatience with ambiguity in perspective, or a clear attempt to conflate the past with the

present. Dominance of these characteristics could indicate a textbook and teacher guide that is a tool to commemorate the suffering of a particular group. The political stance was categorised as weak (aligned to Wertsch’s “history” category) whenever there was an effort to recognise ambiguity in a perspective, or a clear differentiation between the past and the present. Prevalence of these characteristics could indicate a learner book or teacher guide that is a forum for contestation of historical issues and perspectives.

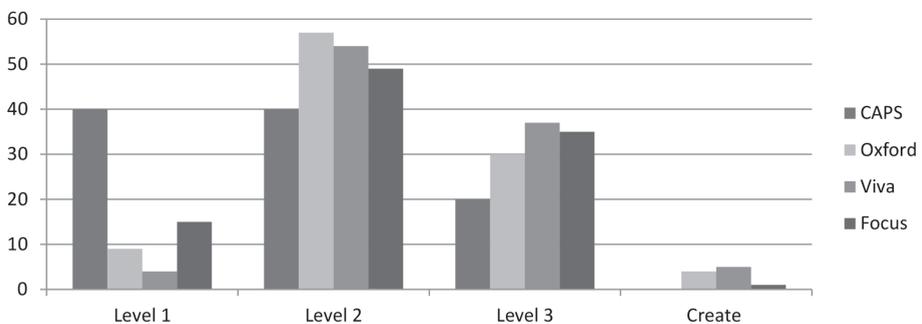
### Data presentation

Here we present how the academic and political projects are portrayed in the assessment tasks of the *European Expansion* chapters, and in the corresponding answers in the teacher guides.

#### *The academic project as expressed in cognitive levels*

The textbook analysis revealed a similar pattern across the three chapters regarding the spread of cognitive levels (see Image 1).

Image 1: Percentage of questions per textbook chapter that corresponded to Grade 10 History CAPS cognitive levels



The assessment tasks in the *European Expansion* chapters primarily assessed CAPS level 2 cognitive skills of understanding and application. A substantial number also focussed on CAPS level 3 analysis and evaluation type questions. The least focus was on skills at opposite ends of the hierarchy, i.e. the skills of remembering and extraction, and the ability of learners to create and own their knowledge of history. Yet, compared to the curriculum, all three textbooks had a greater emphasis on Level 3 skills (analyse, evaluate) than suggested by

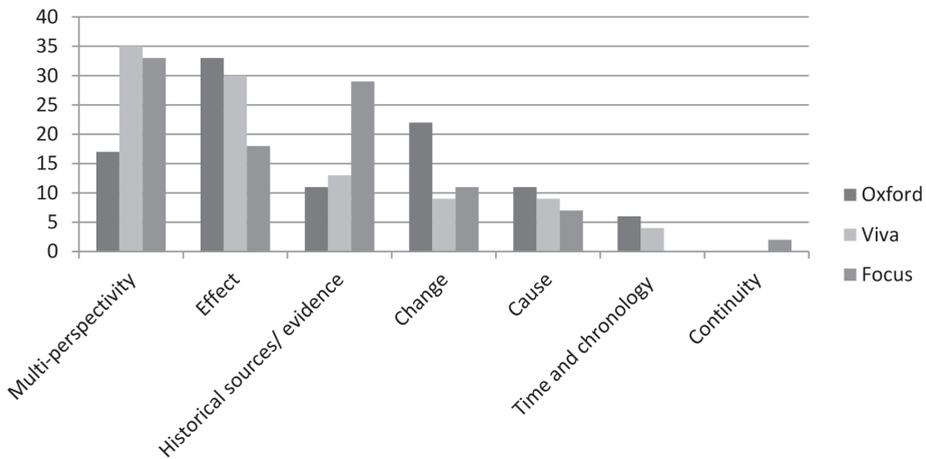
CAPS and in addition, included “create”, which CAPS had not. In addition, focus on lower-order cognitive skills was at Level 2 (comprehend), rather than at Level 1 (remember/extract). Yet, even though the cognitive level spread in the textbook assessment tasks suggested more academic rigour than that proposed by CAPS, there was still a greater emphasis overall on levels 1 and 2 skills (over 60% of activity tasks).

It can be argued that skills like comprehension and application (level 2) are “generic” academic skills. Osborne (2004:5) defines as “generic” academic skills those that involve extracting information, remembering, understanding and application, because they are shared with other subjects. Yet while these skills are “generic”, they are nonetheless important in history as they are concerned with knowing the facts. These “generic skills” dominated across all three textbooks as well as CAPS. Osborne (2004) also states that the discipline of history has its own particular skills. These skills may become academically “generic”, but they are uniquely developed by history, such as the ability to analyse texts and pictures from the past or to evaluate the worth of sources of evidence, through questions like, “to what extent is this source reliable in teaching us about...?” These “unique historical skills” are required by the “doing history” approach. So, in order to encompass the entire academic project of school history, both the skills of knowing and doing history need to be assessed.

### ***The academic project as expressed in conceptual knowledge***

CAPS prescribes five key historical conceptual knowledge foci: historical sources and evidence, multi-perspectivity, cause and effect, change and continuity, time and chronology (2007:10). The assessment tasks in the textbook chapters clearly attempted to cover these forms of conceptual knowledge and encapsulated them in the assessment task headings.

Image 2: Percentage of assessment task headings across all three textbook chapters that focussed on key historical concepts



Analysing the assessment tasks in relation to the CAPS key historical concepts, it emerged that all three textbooks emphasised the two conceptual knowledge foci of multi-perspectivity and effect / consequence. The frequency of these concepts is significant. Understanding multi-perspectivity is fundamental to what historians do (Barton & Levstick, 2003). An emphasis on multi-perspectivity links well with the CAPS Level 3 cognitive skills that require learners to demonstrate an ability to compare and contrast interpretations and perspectives within sources. It also links to Wertsch's idea of a historical mode of thinking that requires a critical, reflective stance by the learner. Understanding effect is particularly necessary for chapters that deal with the impact of conquest on indigenous peoples. Little emphasis was placed on chronology, which we ascribe to CAPS prescribing a broad chronology across the three years of the FET phase, but not within a topic.

### *The political project*

Alongside the conceptual skills required for extracting and interpreting historical knowledge, the History CAPS for FET emphasises citizenship education by referring to how the curriculum has an important role in realising the Constitution's purpose of healing past divisions, establishing a democratic society and building a united South Africa (2011:8), as well as correcting educational imbalances (2011:4). The curriculum mentions the need for

education for human rights, inclusivity, environmental and social justice, sensitivity to issues of diversity, poverty, inequality, race, gender, language, age and disability, as well as the importance of indigenous knowledge systems (2011:5). These issues need to be taught in ways that reflect the perspectives of a broad social spectrum, promote human rights and challenge prejudices (2011:8). The political project in the History CAPS is thus strong.

The political / citizenship project showed up in the textbooks through the:

- Construction of questions and answer guidelines that explicitly used the past to develop an understanding of the present.
- Use of empathy questions to develop learner sensitivity to issues of diversity of perspective, and by extension, to promote the democratic value of tolerance of differing competing viewpoints.
- The presence of activities that highlighted the role of diverse groups in society; as well as the selection of sources that promoted an understanding of the diversity of role-players in historical events.
- The presence of activities / questions that promoted democratic values in general.

The coding focused on the answer guidelines provided in the Teacher Guides. These answer guidelines shape the teachers' responses and marks for learner answers. We categorised the answer guidelines according to Wertsch's categories. Here are four examples:

**Example 1: Classified as “collective memory”: Impatience with ambiguity**

Question	Answer guideline on p. 42 of Teacher Guide	Wertsch category
<p><i>Focus History, Grade 10</i>  <b>Activity 2, p. 45, Question 2.1.</b></p> <p>“Look at the painting in Source B (see below). How would you describe the way in which Columbus and the Spanish are drawn?”</p>	<p>Powerful heroes bringing the Christian message.</p>	<p>Collective memory</p>

The reason for this choice was the impatience with ambiguity evident in the answer. The simplistic answer guideline provides little scope for varied points of view. The picture contains detail that could allow learners to express a variety of opinions on how the Spanish are portrayed. The answer guideline is

impatient with ambiguity in its suggestion that there is only one right answer. Also, no substantiation of opinion is required by the answer guideline. This runs counter to the construct of doing school history.

**Example 2: Classified as “collective memory”: Emphasis on anti-colonial narrative**

Question	Answer guideline on p. 45 of Teacher Guide	Wertsch category
<p><i>Focus History Grade 10, Activity 4, question, 1.2, p. 48.</i></p> <p>What does the picture show? What does it tell us about the past?</p>	<p>The picture shows Spanish conquistadors hunting the indigenous population for sport; beating, raping, torturing, killing, and then using the bodies as food for their hunting dogs. The picture shows how the Spanish regarded the Native American population.</p>	<p>Collective memory</p>

The source document was a picture drawn by Theodorus De Bry in 1590, based on first-hand stories told to him by returning European explorers. The picture was reproduced in a modern newsletter called *The Indian Times*, which campaigns for the rights of the few Native Americans left today. In the context of the historical narrative of anti-colonialism in the chapter, this answer emphasises the extreme negativity of Spanish rule and resorts to generalisation (“the Spanish...the Native American...”), which creates a simplistic understanding of relations between coloniser and colonised. There is evidence of a particular narrative that plays a role in commemorating the suffering of indigenous peoples.

**Example 3: Classified as “history”: Complexity of several interlocking causes**

Question	Answer guideline on p. 22 of Teacher Guide	Wertsch category
<p><i>Viva History Grade 10, Activity 2.4, Question 5, p. 74.</i></p> <p>Write a paragraph of approximately 10-15 lines using the information in the section ‘The siege of Tenochtitlan’ explaining why Cortes and the Spanish were able to defeat the Aztecs.</p>	<p>The paragraph must be written in full sentences and include the following information from the learner book. Possible reasons:</p> <ul style="list-style-type: none"> <li>Aztec mythology</li> <li>Aztec superstitions</li> <li>Indigenous allies for Spanish</li> <li>Timing of the Spanish attack</li> <li>Superior Spanish weaponry</li> <li>Impact of disease</li> <li>Spanish siege tactics</li> </ul> <p>Accept any other relevant answer.</p>	<p>History</p>

A detailed answer is provided which acknowledges the complexity in interpretations regarding the defeat of the Aztecs. The answer presents factors that apportion causes to the Spanish and to the Aztecs. It also includes a caveat instructing the teacher to allow learners to write outside of what is specified in the answer. Thus there is an acknowledgement of the ambiguous nature of historical thinking and an attempt to break away from a simplistic narrative.

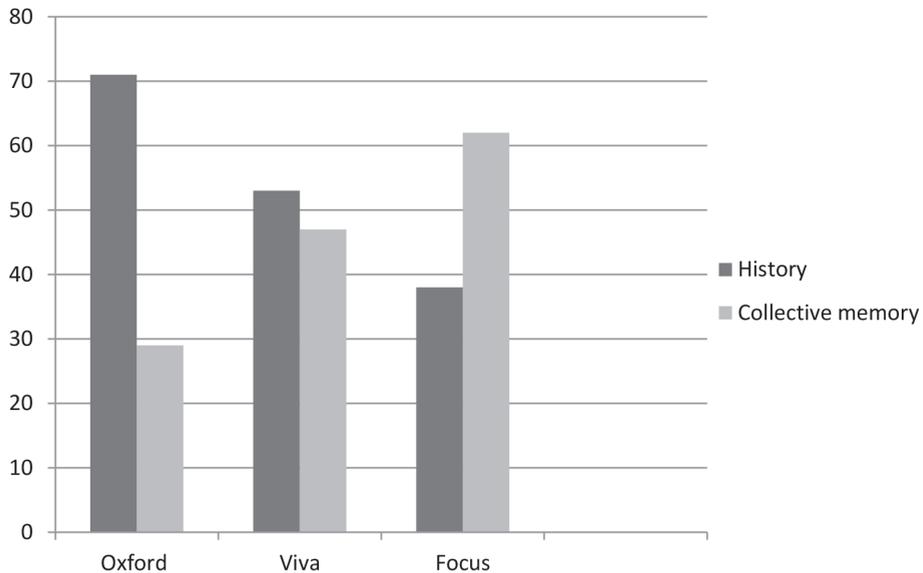
**Example 4: Classified as “history”: Acknowledgment of multiple arguments regarding European motives for colonisation**

Question	Answer guideline	Wertsch category
<p><i>Oxford History</i> <i>Grade 10, Activity 1,</i> <b>Question 1, p. 39.</b></p> <p>Identify the different arguments historians have given about the reasons for European expansion.</p>	<p><b>P. 29 of Teacher Guide.</b></p> <p>The different arguments that historians have given for European expansion are:</p> <ul style="list-style-type: none"> <li>• European culture and religion were superior and therefore they had the God-given right to spread Christianity across the world.</li> <li>• When the Ottoman empire blocked overland trade routes from Asia, the Europeans had to find another way to Asia. It was an economic motive that started their voyages.</li> <li>• Compared to the powerful empires in the East, Europe was poor and desperate. It needed to find new sources of wealth.</li> <li>• As a result of improvements in maritime (naval/sea) technology, Europeans began to explore the oceans.</li> <li>• After the new ideas of the Renaissance (for example that the world was round), courageous Europeans wanted to know more about the world.</li> </ul>	<p>History</p>

The answer guide provides a variety of arguments suggesting a need to understand the complexity involved in thinking about historical processes. The arguments provided also acknowledge the multi-disciplinary nature of history as they suggest political, economic, anthropological or technological interpretations. Thus, the answer does not seek to foreground any particular argument, and echoes the objectivity of Wertsch’s history thinking.

When all the answer guidelines in the Teacher Guides had been coded, the following pattern of frequency emerged across the three textbook chapter answer guidelines:

Figure 3: A comparison of the prevalence (in percentages) of Wertsch's categories across all three textbook chapter answer guidelines



The distribution of answer guidelines is significant, as textbook chapters can only have a limited number of assessment activities, and the types of answers expected, and thus the cognitive skills developed when producing these answers, can have a profound ideological impact. The Teacher Guides for *Oxford* and *Viva* contained a noticeably greater prevalence of Wertsch's history category than did the *Focus* Teacher Guide. The quality of the answer guidelines also differed. In the *Oxford* and *Viva* Teacher Guides, more effort was made to provide answer guidelines that demonstrated development of thought through the expression of opinion and the provision of substantiation. Yet many of the *Focus* answer guidelines were skeletal and prescriptive in nature, and did not require substantiation of opinions.

## Discussion

### *Does the spread of cognitive levels demanded by the assessment tasks aid or hinder the development of historical thinking?*

The distribution of cognitive skill levels of the textbook tasks lies predominantly at Levels 1 and 2. More “generic” academic skills (like comprehension) rather than specifically historical skills dominated across all three textbooks

and CAPS. Osborne (2004:5) makes a convincing argument for “unique historical skills” required by the “doing history” approach. Although he agrees that history shares ‘generic’ academic skills, such as extracting information, remembering, understanding and application, with other subjects, he stresses the skills particular to history, such as the ability to analyse texts and pictures from the past or to evaluate the worth of sources of evidence. Could it be argued that all three textbook chapters actually undermine the development of historical thinking through their predominant focus on “generic” skills? We think not. Textbooks need to account for the differing academic abilities of learners by providing “easier” questions to scaffold the development of their historical skills. Teaching historical skills requires a systematically arranged hierarchy and movement back and forth between different levels of questions. An overwhelming focus on Level 3 skills and the skill of creation<sup>1</sup> could disrupt learning and put school history out of reach of most learners. Also, by not neglecting the need for learners to “know” history (Bertram, 2008), the textbooks’ emphasis on Level 1 and 2 skills provides the foundations for learners to “do” history.<sup>2</sup>

The analysis also showed that the History CAPS key skills for assessment for grades 10, 11 and 12 do not prescribe asking open-ended questions and creating original, coherent pieces of historical knowledge, which are skills seen as vital by doing history theorists. Teachers may come to the conclusion that these skills are not required in the doing school history construct. This may be a case of CAPS inadvertently constraining teachers’ and learners’ understanding of history (Paxton, 1999) and creating a limited understanding of history as a discipline of enquiry. The few textbook assessment tasks that encourage asking open-ended questions or the creation of historical knowledge (4% in Oxford, 5% in Viva, 1% in Focus) play a vital role in repairing this flaw in the construct of history portrayed in the History CAPS. In light of this, we argue that because the levels of cognitive demand and the historical skills assessed in the textbooks go beyond what is demanded by CAPS, they go some way towards aiding historical thinking.

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1 It appears that CAPS is not asking for learners to “create”. However, although CAPS does not require learners to create historical knowledge by finding and analysing new sources, it does require learners to create essays that offer clear conceptual explanations of historical events.

2 This claim is based on findings from one chapter and cannot be made for the whole of the textbooks, as the pattern might have changed had we analysed all the chapters across each textbook. Therefore, the generalizability of this trend beyond the chapters under investigation is not possible.

### ***The relationship between assessment questions and answer guidelines***

The assessment tasks predominantly covered four historical concepts: multi-perspectivity, bias, reliability of sources, and effect or consequence. Appropriate to the content focus on *European expansion and conquest in the 15<sup>th</sup> to 18<sup>th</sup> centuries*, about 30% of the assessment tasks (17% in Oxford, 35% in Viva, 33% in Focus) required an answer using multi-perspectivity. This fits well with the doing history approach portrayed in the CAPS.

In terms of the academic project, it was interesting to note an occasional disconnect between questions and answer guidelines. Particularly in the *Focus* textbook, which has 33% of chapter questions related to multi-perspectivity, the answer guidelines generally consisted of one-liners that did not explain the situation. In example 1 above, the answer guideline reneges on the responsibility to explain the multi-perspectivity embedded in the picture by not showing how learners can recognise and explain the perspective in the picture nor justifying why this picture is understood very differently in the present than it was in the past. In this way, such one-dimensional answer guidelines undermine the development of reasoned argument and debate in the classroom, thus inhibiting both the academic and the citizenship projects. Fortunately, the Teacher Guides by *Oxford* (example 4) and *Viva* (example 3) were better in this respect.

### ***Modes of historical thinking***

Wertsch's (2002) distinction between "collective memory" and "history" enables an evaluation of whether history textbooks and the CAPS encourage debate or commemoration. The political citizenship project in CAPS promotes democracy and diversity, which aligns with the Wertsch "history" category, particularly in light of the doing history approach that emphasises multi-perspectivity. Yet the lack of explicit instruction in CAPS on how to integrate the political and academic project may undermine this. CAPS is subject to interpretation by textbook writers and teachers, so the type and interpretation by these agents could see a history emerge that promotes the production of "collective memory". We argue that this in fact has happened within the textbook chapter assessment tasks under review.

In all three textbook chapters' assessment tasks, an anti-colonial narrative was emphasised, with little effort made to expose learners to other perspectives. However, the Oxford and Viva chapters contained more empathy activities,

which allowed some opportunities for learners to develop an understanding of the “other side” (e.g. Oxford textbook, Activity 2, p. 57, question 6). In the chapters under investigation, the dominance of a particular narrative suggests that these chapters veer towards being temples for the commemoration of the suffering of indigenous peoples, and therefore promote “collective memory” thinking. A more authentic commitment to multi-perspectivity, and the history mode of historical thinking, would be to debate across perspectives, rather than within a single imposed one. That would help to develop learners’ respect for diversity of opinion and to strengthen their ability to explain, justify, have empathy with and challenge alternative perspectives – abilities which are cornerstones of democratic citizenship education.

Morgan and Henning (2011) found a similar trend in Grade 11 NCS History textbooks, which began with a stated position of seeing learners as active participants in knowledge construction, yet the content delivery in the textbooks did not support this position. Learners were not taught how to entertain a different line of thinking, and so critical thinking became a “mere pretence” (Morgan & Henning, 2011:182). The emphasis on a single historical perspective, coupled with one-dimensional answer guidelines (particularly in *Focus*) could have negative implications for the development of skills and values central to history as it is prescribed in the CAPS.

## Conclusion

This paper has explored the nature of history as a school-based discipline and how history is recontextualised in the South African History CAPS and Grade 10 history textbooks, with a particular focus on what is required of learners by the assessment activities and questions. Three interesting findings emerged. Firstly, that all three textbooks went beyond what was demanded by CAPS with regard to levels of cognitive demand in the assessment questions. Secondly, that the quality of answers in the Teachers’ Guides differs widely, and depending on how they are written, these can support or undermine the academic project, especially for higher cognitive level questions. Thirdly, with regard to the two modes of historical thinking within the political dimension, it appears that the emphasis on a particular narrative across all three textbook chapter assessment tasks suggests an over-arching promotion of “collective memory” thinking, even if some individual textbook tasks do assess multi-perspectivity and therefore promote Wertsch’s “historical” thinking. This

finding suggests a tension or misalignment between the political project in CAPS that promotes multi-perspectivity through a focus on democracy and diversity, and how it is recontextualised in the textbooks. Addressing this tension should be a key aim of curriculum and textbook writers given that respect for democracy and the thoughts and rights of others is a key political goal of the CAPS.

We conclude by arguing that in South Africa, both the academic and the citizenship projects of history need to be strong. Learners need to develop the generic and unique skills offered by history so as to become able to understand and analyse the complexities of how the past shapes, but does not determine, the present. Learners also need to develop the skills of empathy – the ability to simultaneously understand several perspectives while maintaining a position - which are required for being a citizen in a multi-cultural society. The history curriculum, textbooks, teaching and assessment tasks need to encapsulate both academic rigour and empathetic multi-perspectivity – they cannot afford to undermine either. If textbook writers aligned more closely with Wertsch's "history" category, which proposes respect for different perspectives and a culture of debate, it would simultaneously strengthen both the academic and the political projects of school history in South Africa.

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