

**An Investigation of Progression in Historical
Thinking in South African History Textbooks**

BY

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Degree of Doctor of Philosophy (History Education)**

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DEDICATION

To my late dad, Mr. M. Bharath, and my sister Linda.

ABSTRACT

In South Africa, where access to classroom materials is limited, the history textbook remains a powerful tool. This research deals with the extent that a range of graded Curriculum and Assessment Policy Statement (CAPS)-compliant history textbooks reflects ‘progression in historical thinking’. *The National Curriculum Statement Grades R–12, Curriculum and Assessment Policy Statement (CAPS), Social Sciences*, (Department of Basic Education, 2011) is based on the principles of social transformation, active and critical thinking, high knowledge and high skill, as well as progression. A sample of seven history textbooks, one each per grade from Grade 3 to Grade 9 is analysed. The study is located within the interpretive paradigm, using the methodology of content analysis. Purposive sampling was directed by the placement of these books on the Department Catalogue, and their popularity and accessibility. The common thread that was analysed through the seven grades unfolded in the story “About me” and “The history of South Africa” from its early inhabitants to democracy. One chapter per textbook was analysed.

The conceptual frame is provided by the content and process dimensions of historical knowledge. These are two complementary, intertwined strands that are necessary for induction into the discipline. ‘Progression’ is not a movement on a linear scale of reasoning from content to process knowledge, but a simultaneous advancement *within each* domain of knowledge. Seixas (2006) unpacks progression in ‘historical thinking’ with six structural benchmarks which are: to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take historical perspectives and understand the moral dimension of historical interpretations.

A combination of theories from history education (Lee & Ashby, Lévesque, Seixas, Shemilt and Bertram), the sociology of knowledge (Bernstein and Maton), Systematic Functional Linguistics (Coffin and Martin) and psychology (Bloom) construct a wide network of analytic tools. Bernstein was critical for describing knowledge structures

and the pedagogic device, while Maton's concept of semantic gravity was used to describe shifts in context dependence from contextualised to decontextualised knowledge. Maton's concept of semantic density was also used to describe condensation of meaning in texts. Lee and Ashby, Lévesque, Seixas and Shemilt were useful in providing the key descriptions of historical concepts; and Coffin and Martin were included to make sense of the language and genre which pervades textbooks. Finally, Bloom was added to describe cognitive advancement in the textbooks.

A combination of both qualitative and quantitative methods used in the study found progression in both the substantive and procedural dimensions in varying degrees. Progression was also influenced by different principles. Findings suggest a trajectory in the substantive knowledge from 'common sense to uncommon sense', from the learner's immediate context to those far removed from their experiences, from simple to more complex concepts and from contextualised knowledge to decontextualized knowledge. Advancement was observed in the cognitive demand, the skills, the density of semantic terms, and in the increase of and use of historical sources. The principle of chronology frames the history in Grades 6, 7, 8 and 9, which is absent from earlier grades. The number of events, and specific and generalised participants under study also increases. Temporal and spatial advancement is accompanied by language shifts from informal and everyday, to terms that are more complex and 'academic'. Genres progress from the recording, to the explaining, and then to the interpretation genre. Writing and reading demands progress from practical, simple tasks to complex, written accounts, also demonstrating nonlinear, conceptual advancement in second-order principles of 'continuity and change', 'cause and effect' and 'historical significance'. Grade 9 presents the greatest number and interrogation of sources initiating the multi-perspective approach, which is expected earlier in the curriculum. This is unfortunate, given that only about 20% of learners go on to select history in Grade 10.

Key Words: progression, historical thinking, content analysis, substantive knowledge, procedural knowledge, history textbooks.

LIST OF ACRONYMS

AD	Anno Domini
ANC	African National Congress
APO	African Political Organisation
BCE	Before Common Era
BICS	Basic Interpersonal Communication Skills
C2005	Curriculum 2005
CALPS	Cognitive Academic Language Proficiency Skills
CAPS	Curriculum and Assessment Policy Statement
CDA	Critical Discourse Analysis
CE	Common Era
CHATA	Concepts of History and Teaching Approaches
COSATU	Congress of South African Trade Unions
CSHC	University of British Columbia's Centre for the Study of Historical Consciousness
CUNY	City University of New York
DEIC	Dutch East India Company
DfES	Department of Education and Science
DoE	Department of Education
ETEC	Educational Technology
FET	Further Education and Training
FOSATU	Federation of South African Trade Unions
GET	General Education Training
IEC	Independent Electoral Committee
IFP	Inkatha Freedom Party
LTSM	Learning and Teaching Support Material

MEC	Minister of the Executive Council
NCS	National Curriculum Statement
PAC	Pan Africanist Congress
SA	South Africa
SACP	South African Communist Party
SADTU	South African Democratic Teachers Union
SANNC	South African Native National Congress
SASM	South African Students' Movement
SASO	South African Students' Organisation
SCAA	School's Curriculum and Assessment Authority
SCHP	Schools Council History Project
SFL	Systematic Functional Linguistics
TIC	Transvaal Indian Congress
UDF	United Democratic Front
UK	United Kingdom
UKZN	University of KwaZulu-Natal
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USA	United States of America
USSR	Union of Soviet Socialist Republics
VOC	Vereenigde Oostindische Compagnie

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CHAPTER 1

INTRODUCTION TO THESIS

1.1 Introduction

The function of this introductory chapter is to outline the background and the context of the study and to clarify its position in the field of history education and the sociology of knowledge. The rationale and motivation explains why the study is engaged with in the chosen field. The focus and the purpose of the study gives insight into what the phenomenon is, which direction I proceed in and what the parameters of the research are. The key research questions illustrate what is being investigated, and then in the research design and methodology, the process of how I am going to investigate the phenomenon is described, so as to map which route I follow to answer these questions. An outline or overview of the thesis is finally presented to show how the components of the thesis are structured together to form the whole. The conclusion summarises the various steps undertaken in the study.

1.2 Background and contextualisation

The context for the study is post-apartheid South Africa and the object under study is a sample of history textbooks that carry the current history curriculum into the classroom. The history curriculum is drawn from the *National Curriculum Statement Grades R–12, Curriculum and Assessment Policy Statement (CAPS), Social Sciences*, (Department of Basic Education, 2011b,c). Post-apartheid South African textbooks have become increasingly scrutinised for various reasons. Featuring prominently among these are those that are concerned over the shape of the new history and the representation of race, gender and power, while others deal with how textbooks vary in their approaches to a democratic national history. Many evaluate how the curriculum of apartheid has evolved into that which replaced it, proceeding to describe the shape of change and revolution in the new ideas of history represented in the new curricula. These tendencies are anticipated, since South Africa's past was fraught with tensions of race rivalry and representational issues, so 'what' history is deemed to be important in a country is invariably tied to those 'who' are in power. Crawford (2003, p. 5) elucidates that, "Embedded in textbooks are narratives and stories that nation states choose to tell about themselves", and that the use of

textbooks is associated with “ideology, politics and values” which “function at different levels of power, status and influence”. Researchers from various fields, including history, have had some pertinent rationale for comments and suggestions regarding the content or presentation of knowledge, given the number of curriculum shifts that span over two decades. Debates continue to rage over the shape of knowledge: what content and time periods should be studied, which methods to use and for what purpose, and how it fits in with the vision of creating a unified history for South Africa’s diverse population. The international vision of teaching citizenship in history textbooks has perhaps set national initiatives on similar paths.

Earlier, Kros and Greybe (1997, p. 13) argued that in a post-apartheid South Africa, “History had to justify its place in an under-resourced pressurised curriculum” (cited in Samarbaksh-Liberge, 2002). They claimed that South African history continued to be experienced as abrasive and damaging for most pupils, and that the big question about what history could offer beyond the usual bland platitudes had not been addressed. Simultaneously, they conceded that there were very different concerns that required address such as what South African history was about. Concerns then shifted towards “identity, national reconstruction, reconciliation, as well as those pertaining to pupil’s cognitive growth” (*ibid*).

Later, Bertram (2011, p. 3) argued that the quality of formal schooling in South Africa over the past fifteen years has not improved despite the various curriculum shifts, text policies and huge investment in teacher development workshops. She highlights how South African learners underachieve on national and international learner tests, drawing from Fleisch (2007), and identifies a set of reasons tied to the macro-societal level where poverty, malnutrition, unemployment and high HIV/AIDS rates have a high correlation with poor learner achievement. Added to this, the material and social conditions in which many teachers work do not support quality learning. The passage of time has done very little to alter learner achievement. At the classroom level, Hoadley (2007) argues that many teachers do not induct their learners systematically into school knowledge. By implication, the role of the textbook in systematically inducting learners into history knowledge is an equally pivotal area of concern. The role of the textbook becomes difficult to imagine, given the scenario described by the researchers.

A brief overview of the various curriculum shifts follows in Table 1.1.

Table 1.1 Post-apartheid curriculum shifts

Year	Curriculum Shift	Focus and textbook policy
1997	Outcomes-based education (OBE) in the form of C2005. (Competence Curriculum with strong focus on generic skills (outcomes))	<ul style="list-style-type: none"> - Clear outcomes - Lack of knowledge stipulation/content - Strong integration - Proper and comprehensive use of textbooks is discouraged and undermined
2000	Review of OBE First curriculum revision: <i>Revised National Curriculum Statement Grades R–9 and the National Curriculum Statement Grades 10–12 (2002)</i>	
2009	Revision of the Revised National Curriculum Statement (2002) and National Curriculum Statement Grades 10–12	<ul style="list-style-type: none"> - Some content returns - Outcomes renamed Assessment Standards - Textbooks and reading reintroduced
2011	<p><i>Two National Curriculum Statements for Grades R–9 and Grades 10–12 respectively are combined into a single document called National Curriculum Statement Grades R–12</i></p> <p>The National Curriculum Statement Grades R–12 includes the Curriculum and Assessment Policy Statements (CAPS) for all approved subjects</p>	<ul style="list-style-type: none"> - Clear content focus - Removal of outcomes - Clear specification of what is to be taught on a term-by-term basis - Policy includes one textbook per learner per subject - Clear policy on selection of texts from a National Catalogue, retrieval and finance

Outcomes-based education largely diluted the need for textbooks. However, the re-established importance and purpose of the textbook in the South African history classroom, post-Curriculum 2005 (C2005), directs our attention to ‘what’ history is going to be learned and ‘how’ learners are going to be advanced through the school in a disciplinary sense. The disciplinary endeavour is explicitly elucidated in the curriculum documents.

Since “school textbooks are the dominant definition of the curriculum in schools” (Crawford, 2003, p. 3), they provide salient material for analysis. Crawford (2003) describes how what is in the textbook may not necessarily be learnt or taught, and that texts are subject to a multiplicity of readings by different people with the material having the potential to be different to what the author intended. Material in the

textbook can therefore be accepted, re-structured or rejected. With the extensive background of South African curriculum reform in a post-apartheid era, textbook research is a particularly rich and fertile area to engage with. Research has shown that textbooks continue to exert a powerful influence in history teaching. In fact, “both local and international research has shown that the textbook is the most effective tool to ensure consistency, coverage, appropriate pacing and better quality instruction in a curriculum” (Department of Education, 2000, p. 9).

The process of history curriculum reform, accompanying each of the shifts mentioned above, has created the present CAPS history curriculum. Formulated out of new policies and directions, these history textbooks are the foci of the study. The new CAPS curriculum places strong emphasis on the history textbook, stipulating that each child should have access to one in the classroom. It seems obligatory that their content be examined and analysed, not only to view the kind of history the learner engages with, but also to evaluate its form, structure, consistency and all of the other features that give them local and international status.

While the historical and structural development of the textbook will be explored in greater detail in the literature study, this introduction seeks to understand how the phenomenon of progression is embedded in these texts. Progression, in historical thinking, is the advancement of historical knowledge. This knowledge comprises a specialist structure and a particular sequence. The investigation aims to interrogate the disciplinary or specialist structure, and any sequence that may arise, by using a network of various concepts that support progression.

To understand the present shape of the South African history curriculum and its reflection in school textbooks, various factors have to be considered. It requires an extended view of the requirements of the field of the academic discipline of history and how it has changed from Memory-History to Disciplinary-History.¹ It also involves an understanding of the era of apartheid, its role in particularising Afrikaner history and heroes, the post-apartheid era, and the impact of democracy and its heroes on textbooks. This transition has impacted on school history, which is also expected to

¹Lévesque (2008) suggests that Memory-History is a ‘factual tradition’ commemorating memory and heritage. History is known by ‘remembering’ it. Disciplinary-History, being the true nature of the subject, involves domain specific skills, mastering both concepts and knowledge of history by ‘doing’ it.

retain the core traditions and procedures of the discipline. The history that arrives in the history textbook, has been designed, authored and published to meet specific cultural, economic, ideological and social demands, as well as shift government priorities. It is clear that while the character and form of history has altered substantially, the central convention of studying the past remains resolute.

The common vision of both the Department of Education and history educators was discussed at a colloquium held at Sastri College, Durban, South Africa, in October 2015. The Department of Education (Province of KwaZulu-Natal) and the Umlazi District came together to focus on the centrality of history as a subject in the curriculum of South African schools.² There were recommendations that history be made into a compulsory subject for Grades 10–12.³ Presently, it is compulsory for the Foundation Phase, Intermediate and Senior Phases, but not for the FET Phase (Grades 10–12). At the curriculum, attention was drawn to the particular analytical skills that history teaches that other subjects do not. There was consensus that history was a subject that developed the learners' national identity, the moral dimension, and reading and writing skills, preparing them as an educated electorate. Recent xenophobic attacks in South Africa, the removal of important statues and figures of colonial history and the lack of knowledge among the youth in South Africa opened a discussion on the need to re-evaluate the history curriculum and to re-write it. The discussion involved the constraints and the opportunities regarding the incorporation of history as a mandatory subject in the school curriculum. The colloquium also included discussion on the education and training of a new cadre of history teachers and the curriculum framework for a new history for South African schools. There was also a focus on history as a medium for teaching life-long skills, as enshrined in the Constitution, as well as being an underpinning subject for the transformation of school education.

Noting these considerations, I present in the literature review a detailed discussion of the curriculum changes and its effects on history textbooks. I also consider the extensive role of the textbook, evaluating its trajectory from its inception in the

² A district is an education site or geographic area within a province which has been demarcated by the MEC (Minister of the Executive Council) for Education of the province for the purposes of effective management and service delivery.

³ A Ministerial Task Team (2015) has been appointed by the Minister of Basic Education, Angie Motshekga, to oversee the implementation of compulsory history in the FET schools, Grades 10–12.

earliest times to the present form. I note key eras and changes in the South African curriculum, while elaborating extensively on the internal constructions of the textbook that may advance or constrain learning, if the textbook is used as a main teaching and learning resource.

1.3 Rationale and motivation of study

The academic rationale for this study was influenced by my Master's degree in 2009, *A study of knowledge representations in grade 6 History textbooks before and after 1994* (Bertram & Bharath, 2011; Bharath, 2009). I found that with various curriculum shifts, different forms of history were conceptualised. The textbooks created with each shift reflected these views of history and were certainly worth examining. I encountered some post-apartheid history textbooks that represented everyday knowledge that could be found in the life orientation subject textbooks and in those of other subjects. The earliest curriculum shift, post-apartheid, affected the content to such an extent that the study of the past became seriously obscured. I learned that the discipline of history required both substantive (content) and procedural (skills) knowledge to be advanced, as they are compulsory, complementary and inter-twined strands that make up history knowledge. My study illuminated how these knowledge types varied across the textbooks and that there was very real danger of the everyday discourse overwhelming or dwarfing the substantive and procedural dimensions. I argued for the advancement of disciplinary knowledge, incorporating both dimensions (substantive and procedural) of knowledge, with the recognition that everyday knowledge played a role in its delivery. I explained how history's substantive knowledge in newer textbooks had lost some of its content and had become 'watered-down' by its integration with everyday knowledge. However, in these textbooks the importance of the everyday discourse in delivering strongly abstract, dense and complex content was not engaged with. I had also made certain recommendations and avenues for future research, with the overarching objective directed towards the improvement of the textbook. Textbooks were fascinating to me and remained central to my interest. Further engagement with text analyses, thus, grew out of the recommendations of my initial study. The alteration to the form and shape of history in textbooks intrigued me, creating new angles and debates to think about. However, my interest was firmly rooted in the field of textbook research. The new quest

became one of understanding how knowledge, particularly disciplinary knowledge, developed in both the substantive and procedural dimensions across grades in the school history curriculum. Since textbooks brought the curriculum into the classroom, I thought it was an appropriate start from which to view this understanding. While following the journey of the two key knowledge dimensions, it was equally possible to view how the everyday discourse featured along this learning continuum and what role it played in respect to the other key dimensions.

Cooper (1991, p. 14) states that, “if young children are to begin to understand, in an increasingly complex way, the thinking processes which lie at the heart of historical understanding, teachers need to explore the methods by which this may be achieved”. I am such a teacher.

As a full-time educator and part-time researcher, my interaction with various stakeholders within education commenced some twenty-six years ago when I started teaching. I also pursued an Honours degree in history after majoring in it and I have taught the subject for over twenty years. Over this period, I realised the immense impact a textbook can have on a learner. I presently teach both history and geography in the Intermediate and Senior Phases, while working closely with textbooks and curriculum documents of history, and so I am also aware of the ways in which teachers, chiefly history teachers, can use these textbooks. As a teacher, dealing with these textbooks daily means that I am an ‘insider’ of sorts. Over time, I began to experience the effects of the textbooks and my internal conflict as an educator of history began to fester as this ‘insider’ view was promulgated. I began to develop a sense of what textbooks are, how they came to be in the classroom, what their purpose is and how they function in the classroom as a representative of the curriculum. I also began to realise that the textbook contents are significant for teachers of history, as they feature the content of history lessons. Each curriculum shift meant new content or differently structured and focused content. Policy documents do not provide all the content for a history lesson, they merely list topics and time frames. Textbooks are manufactured for a particular curriculum by various publishers and are labelled according to the curriculum to which they are aligned. There are other resources like the Internet, but this is a large space with vast material and teachers are still required to make selections and decisions on viability. Teachers would also need to consider the perspective of the author and the nature of the material. It seems easier to access a

textbook that is already curriculum-compliant and suitable for classroom use than to begin searching and researching a new topic. Those textbooks that are curriculum-compliant and have gone through significant screening by a team of experts are placed on a catalogue constructed by the Department of Education. The approval and screening process ensures that textbooks are of quality and accurate, and teacher selections are guided by this understanding.

My experience with the numerous curriculum shifts has been frustrating and exhausting, as the history textbook sheds its skin, appearance, content and packaging each time. Harnett's (2003, p. 29) contention that textbooks represent the changing discourse about the nature and content of the history curriculum in terms of historical knowledge and understanding, resonates strongly with my own view. As a social sciences educator, my lesson structure, content and methodology has had to be substantially adapted to align with new curriculum policy. The textbook provided some relief with regard to sourcing material for my lessons. However, as I interacted with various textbooks over the years, I found that there is still much work to do.

The South African Minister of Basic Education, Angela Motshekga, has erstwhile labelled the CAPS curriculum as the 'final' curriculum, thereby restricting and conserving advancement on the form and nature of the curriculum. There are few countries in the world that can boast a 'final' curriculum, as there is always space for improvement and research, especially since it is the educators in schools who actually drive the curriculum in the classroom. They are able to see the flaws in it and can make recommendations. There are aspects of CAPS that appear clear and ordered on paper, within its policy packaging, but which are consistently problematic in practice. There are fundamental concerns with regard to assessment in CAPS, which require address. Questions on matters of the curriculum are important to ask; investigations are critical too for the evaluation of the status quo, or we cannot strive to improve standards and obtain better practices. Research must therefore be on going to find the 'ultimate' curriculum, which we know is impossible. The implication of a 'final' curriculum challenges future development. This view is resonated in Wheelahan's (2010, p. 67–68) contention of an ontological commitment underpinning any curriculum, which represents our best undertaking of what the world is like. Any kind of future alternative may only be possible, if we can change what we currently do or that we can acknowledge the possibility of an alternative.

An educator-researcher perspective, thus, informs my rationale. The shape and structure of history knowledge within the subject of history is central to my interest. I have found that the structure of history knowledge has not been fully engaged with in the South African context. Perhaps the content of history and its pacing has become more clearly demarcated in the newer CAPS curriculum documents, but study of the form of historical knowledge, in a disciplinary sense, has not received much engagement. My disciplinary lens has focused on the journey to understand the progression of historical thinking across different phases of the school curriculum. Given the fact that historical thinking is so scantily considered and sometimes equated to historical literacy, and at other times linked with historiography, the research questions began to take shape.

From the host of scholarship it became clear that, like science, which has very clear parameters, school history, which is recontextualised in the school textbook, has its own disciplinary parameters. There is argument that science has a more structured framework than history and also can be said to ‘progress’ in very specific ways. It is also argued that history is more interdisciplinary, as it is embedded in the social sciences subject together with the subject of geography. A growing influence from an alternate perspective informed my own research space and knowledge making endeavours. The voluminous literature available demonstrated an overwhelming, yet powerful discourse on ideological and related issues in history, and I felt compelled to bypass these debates and instead engage with the theme of progression in historical thinking. I did not want to scratch the surface, but wanted to propel the study deep down into different layers that spoke to me about the phenomenon of progression in historical thinking, borrowing from the history of education, cognitive studies, sociology of education and SFL (Systematic Functional Linguistics). While these are different disciplines of study they, however, work in tandem to describe the phenomenon.

My study focuses on how the academic discipline of history becomes recontextualised in school history. Stengel (1997) makes a conceptual distinction between an ‘academic discipline’ and a ‘school subject’, arguing that these are contestable curricular concepts. In this study, I draw on the distinctions of Deng (2012, p. 40), who argues that a school subject refers to an area of learning within the school curriculum that constitutes an institutionally defined field of knowledge and practice

for learning and teaching. He contrasts this with a description of an academic discipline as a field of learning affiliated with an academic department within a university, formulated for the advancement of research and scholarship and the professional training of researchers, academics, and specialists (*ibid*). School history textbooks form part of this recontextualised field. Muller (2007, p. 80) argues that, “If recontextualisation totally severs any relation [between the parent knowledge structure and the recontextualized school subject], then how is specialised knowledge ever produced?”. This is a fair question directed at the different way the specialist or historian does history and the way the school teaches it. The form of history is thus altered and is described as recontextualised in school textbooks for the learner.

My study focuses on textbooks used in the Foundation, Intermediate and Early Secondary Phases of the school curriculum and how they show progression. After considering the role of the textbook and an under-developed construct of progression, I formulated the research questions to direct the investigation in an effort to map out what the phenomenon signifies for me. This would also signal to other researchers what progression in textbooks could mean, how it maps out in the various textbooks under study and what the research findings could imply for school history. These findings could mean different things to different stakeholders. The form of knowledge in history textbooks is always important to the system of education, the curriculum developers, textbook writers, publishers, teachers and students using the textbook, as well as parents who are concerned about what their children are reading. That the textbooks are high quality and present learners with important key information in an effective way, will also generate sustained interest in the subject and enable significant retention and learning, is paramount in the minds of all.

While discussing the significance of doctoral education in South Africa against the background of a national initiative to boost the South Africa’s competitiveness within a global knowledge economy, Jansen (2011) argues that many studies make little impact in the world of scholarship because they lack significance. I believe that my study contributes to knowledge making, as it delves into a concept that, to date, has been to a large extent suggestive rather than deeply explanatory by investigation. Here, I have extended and augmented many of the suggestions around the concept of historical thinking and brought them together to generate a deeper understanding. Therefore, unlike the ‘drones’ to which Jansen (2011) refers, who simply want to

deliver a standard academic project, I have attempted to be ‘ambitious’ and in Jansen’s words (2011, p. 139–140), I ‘spotted my gap’ and ‘claimed it’.

The rationale for this study was also presented at the 2014 conference on international textbooks in Braunschweig, Germany, at the Georg Eckert Institute. Here, I met with many fascinating doctoral students from around the world and worked in the extensive library, housing rich literature on history textbooks. It was apparent that research could be undertaken in history in various topics that bridge a multitude of perspectives. Divergent methodological and conceptual tools could be designed, accessed and utilised. For me, it seemed clear that research into progression in historical thinking was fairly new territory with regard to its appearance and monitoring in textbooks.

1.4 Focus and purpose

In the foregoing sections, I clarified how the background and context of South African history motivated me towards the field of textbook research. I also explained my stance as a teacher and researcher, which allowed me an ‘insider perspective’ as I experienced curriculum reform by practising it. I worked closely with the textbooks in each curriculum on a daily basis. This afforded me the opportunity to ‘know’ textbooks intimately and establish a relationship with them, as I depended on them to guide my teaching and my learners as they learned the history I taught. I do not say that I taught all of the history in the textbooks I used, as it appeared in the textbook. I do, however, say my teaching material was drawn from them. I did, and continue to, teach selectively what I could, according to the time stipulations. Presently, many history teachers frown at the content of the CAPS history curriculum, arguing that it is too vast. Content is clearly stipulated and the hours allocated for each topic are also advised. Amid the expected project work and assignments the teacher supervises during lesson time, there exists further tasks, to dispense, explain and assess the tasks according to prescriptive criteria in specially designed rubrics, as well as do formal assessments in the form of tests and examinations. Teachers are also expected to moderate and remediate the tasks while recording all the learner’s marks, reporting to each learner on their progress, as well as identifying those learners with special needs and dove-tailing lesson programmes for their specific levels. It is, therefore, not surprising that teachers are finding it increasingly difficult to teach the content within

the time stipulated. As such, they are becoming more reliant on the textbook to direct content coverage and classroom activity.

With the ‘new’ history being written post-apartheid, many of the old heroes from the Afrikaner version of history disappeared, only to be replaced by ‘newer’ heroes of democracy. Teachers can then teach selectively, choosing to cover some topics intensively while skimming the surface of others, all within the stipulated time. This can lead to fragmentary and superficial teaching and understanding. History is a subject in which the same story can be told from a multitude of perspectives and, therefore, while some can tell the story in an abridged version of two pages, others can write a full thesis of the same story. Novice teachers may neglect the disciplinary infusion of history and teach a topic with a single source in order to cover the content timeously, to the detriment of the learner historian.

I am purposefully raising the debates about textbook content and coverage, the changing shape of history and the differences of opinion over ‘what’ and ‘whose’ history gets told. My intention is to highlight the common debates and to focus the study onto what has not received due attention. I define the disciplinary shape of history, as it advances through the Foundation, Intermediate and Senior Phases⁴ of the school history curriculum, as my key area of concern. This focus is to understand how the phenomenon of historical thinking progresses across these phases of the school curriculum, considering the complementary strands or dimensions of the substantive (first-order concepts) and the procedural (second-order concepts). It is argued that historical thinking represents the second-order concepts that advance as a learner moves into higher grades. Disciplinary history also involves learners engaging in historical inquiry, which means that learners analyse source material as evidence in the construction of historical interpretation (Whitehouse, 2015). Historical inquiry allows the agency in learners to understand the past by evaluating sources, their value and role in representing the perspectives of people in the past. Without wearing the shoes of the people in the past, disciplinary rigour allows for the construction of a perspective on these people of history. Disciplinary heuristics, according to VanSledright (2004), involves interpretation and synthesis of sources, displaying the kind of rigour expected. However, the disciplinary elements of thinking historically of

⁴ Foundation Phase (Grades R–3), Intermediate Phase (Grades 4–6) and Senior Phase (Grades 7–9).

experts in history are advanced and complex and may not be the same in school history. The specialised procedures employed by historians are therefore recontextualised in school history. This study also focuses on how the sampled textbooks incorporate sources through the different phases in the South African curriculum, so as to describe trends in the observations, and so point to the nature and appearance of disciplinary practice in textbooks.

The present study undertakes to investigate the phenomenon in a sample of CAPS-compliant⁵ textbooks, each representing a grade from three phases of the school curriculum. If textbooks are the closest form of the history curriculum in the classroom, as described above, then it is important to view how this nuanced type of historical thinking is incorporated in textbooks. How, indeed, do the substantive and procedural dimensions advance through the grade continuum? What are the key signals of advancement? In what ways do they differ? How can they be described and quantified? How are sources used in textbooks? Are they incorporating the necessary disciplinary rigour? There is a significant lack of attention to these necessary questions, and so they provide the impetus for my study, carving my own research space. These are not easy questions to answer and since there were no prior studies to emulate, I delved into various fields to engage with their debates and understandings of progression and utilise their ideas for my study. A combination of theories from history education, the sociology of education, psychology of education and SFL (Systematic Functional Linguistics) were researched, and utilised with particular interest and attention on language as the mediator of progression in school history.

1.5 Key research questions

The critical question of this research is:

- To what extent do a range of graded CAPS compliant history textbooks reflect progression in historical thinking through different phases in school history?

Further sub-questions, defining the parameters of the research are:

⁵ Approved textbooks that are aligned with the Curriculum and Assessment Policy and are listed on the National LTSM (Learner and Teacher Support Materials) catalogue.

- What kinds of substantive and procedural concepts of knowledge are foregrounded in a range of current history textbooks?
- How do these texts represent shifts or progression in these disciplinary concepts over three phases in the South African history curriculum?

1.6 Research design and methodology

In Chapter Four I first describe the epistemological and ontological location of my study, which indicates my view of how knowledge and reality is constructed. Such a positioning would exemplify the methodology of choice and the route I take to answer my research questions. Mertens (2005) maintains that research paradigms are not about methods, but are about a researcher's belief systems and how these affect their research designs. Guba and Lincoln (1994, p. 105) indicate that, "the belief system or world-view guides the investigator, not only in the choice of method but in ontologically and epistemologically (the branch of philosophy that deals with knowledge) fundamental ways".

Two views of knowledge, the constructionist relativism and positivist absolutism present two extreme paradoxes. The constructionist approach denies that the concept of truth has any real objectivity. In constructionism, objective knowledge is impossible and it is not recognised that any knowledge can be absolute, in the positivist sense (Moore, 2004, p.148). Conversely, positivist absolutism recognises truth and its objectivity. Exemplified by science, knowledge in positivism is objective and its objectivity depends on it not being social. A third position with regard to the way knowledge is viewed is critical realism. According to Moore (2004, p. 149), critical realism treats knowledge as social and "seeks the conditions for truth not in abstract forms of logic but in material conditions under which it is produced". Realism presents a position that endorses that the way in which we go about producing knowledge has been proved more reliable than others. My study is located in the field of the sociology of education, as it aims to produce knowledge by examining existing knowledge structures and analysing how they progress in school history textbooks. Social constructivist theories involve active construction of meaning by learners, where knowledge is context dependent, socially mediated and situated in the 'real-world' of the learner (Wheelahan, 2010, p. 5) at the expense of the disciplinary knowledge. Social realism argues that all knowledge is socially

produced by the community of knowledge producers, and that there is an objective world, one that exists independently of our social constructions (*ibid.* p. 8). One cannot study knowledge and its structure in the curriculum or the textbook unless one has an understanding of the theory of its nature.

In my chapter on research methodology, I give a detailed account of how I conducted the analysis of the content of a sample of textbooks. I describe the method of sampling and aggregation of content into chapters, and the convergence of tools from various theorists. Diagrams of the various steps of the analysis are presented at the start of each chapter to explicate the analytic process. I also describe the external language that will be used to code knowledge in the textbooks. The results of the analysis will provide many opportunities for discussion, as the elaborate methodology embraces multi-pronged tools, each with a different purpose. They operate in tandem and incrementally to tell the full story. The methodology is linked to the structure of the thesis, as different chapters present parts of the analysis and components of the thesis.

1.7 Outline of thesis

In this section, I provide a summation of the study by describing its structural components. The overview of the chapters in the thesis accentuates the structural order and purpose. A total of nine chapters construct the thesis. The first of these presents an introduction to the study. In the introduction, I have foregrounded the role of the history textbook in a post-apartheid context. Current CAPS-compliant textbooks are analysed so as to understand how they develop historical thinking. A brief reference is extended to the ideological and political changes in South Africa that altered, not only the academic shape of the discipline, but also the character of history as a school subject.

A rationale for the study is presented, drawing from a personal, national and international perspective. I also clarify my intention to integrate different disciplines to answer the research questions. The critical and sub-questions defining the parameters of the research are elucidated. Finally, the chapter is concluded with a description of my epistemological and ontological position that directs my choice of research design and methodology.

In Chapter Two, in-depth coverage of recent scholarship in the realm of history education and textbook studies is presented. I also review the literature available on theories associated with progression. Essential concepts drawn out of this exercise inform the conceptual and theoretical framework that follows in Chapter Three. The literature review is structured into two parts. The first concerns the role and wide use of textbooks, while the second part discusses the concepts and elements at work in the textbook (internal constructions). Textbook analysis as a method is also evaluated and the complex process of how textbooks are listed on a National Catalogue and then selected by teachers in South African schools is described. An in-depth discussion of the general changes in education in South Africa is completed with the purpose of describing the renewed shape, aim and objective of history as a discipline and as a school subject. The second part of the literature review examines the cognitive structures in textbooks, the genres presented in text, the specific concepts that are taught, the degree of nominalisation in texts, as well as the reading and writing opportunities that influence history learning, and so, progression.

Chapter Three presents a unified conceptual and theoretical framework for the investigation of progression. It describes how various theories can be merged to illuminate the phenomenon. The intersecting theories from different disciplines construct an elaborate theoretical field. A bank of concepts and a language of description operationalised by the study is built from the ideas of key scholars such as Bernstein, Maton, Lee and Ashby, Coffin, Martin, Lévesque and Bertram, so as to proceed with a content analysis of a sample of seven history textbooks, ranging across the Foundation, Intermediate and Senior Phases of the South African history school curriculum.

In Chapter Four, the research design and methodology is described. The choice of methodology is determined by the researcher's ontological and epistemological position. My position is described and clarified. The fact that the data is already in the public domain meant that data was not going to be 'collected', but that it was going to be 'generated' from the textbooks. Tools were going to be selected, designed and modified for the purpose of the analysis. That data was already in the public domain also meant there were fewer ethical considerations. The mixed-mode analytical method comprising of both a qualitative and quantitative dimension is described with a plethora of examples. The sampling method is described, leading to a clarification of

the research design and paradigm. The analysis is shown to be completed in three levels, each with different objectives and tools that are later merged to build an understanding of progression.

The complex route taken by the analysis needed structure, assembly and coherence. I therefore designated a chapter for each level of analysis. Organising the chapters as I did was useful for the order and logical arrangement of the thesis. Level One (Chapter Five) involves a qualitative analysis; Level Two (Chapter Six) constitutes analysis of genre types, nominalisation, skills and concepts to be acquired, reading and writing production, and finally; Level Three comprises a series of three steps: Step One deals with the 'Institutionalisation of information' in text after the segments are identified and coded; Step Two, also using the tools of 'Institutionalisation', deals with 'Historical source inquiry' to analyse how textbooks use their sources. While they both involve institutionalisation, there was a rationale for separating the two. One of the key second-order historical concepts involves using source as evidence to construct arguments, and conducting an inquiry into sources was a calculated strategy to generate data; and Step Three deals with the 'Cognitive demand' of the tasks. The findings and discussion of Level Two and Level Three is presented at the end of the chapters. These levels and steps are presented diagrammatically at the start of each chapter for ease of reference. The recording tools that are used in each level and step are described and included in the Appendices of the thesis.

Chapter Five introduces the preliminary level of the analysis that deals with a qualitative, overall look at the data appearance and presentation. The chapter presents the 'visual' stage, where observations are recorded and particular categories identified. This preparatory phase culminated in a decision on how to proceed with later analysis. The process by which the textbooks were mined to extract information and classified into the categories or themes of 'Time and Space', 'Concept Extraction' (new ideas or content-related words), and 'Second-order Conceptual Prompts' is explained. Theoretical links are also included to explain which theory is suitable for inclusion in the designated level of the analysis and why it was useful. The introductory page of each textbook chapter is scanned and presented at the commencement of each analysis to provide a visual presentation or appearance of the knowledge content. Thereafter, a descriptive journey is undertaken into each of the

texts to analyse its contents. Discussion of the data takes place concurrently, as data were observed and recorded, almost like field notes.

Chapter Six deals with the second level of analysis, interrogating the text or genre structure, nominalisation, specific concepts taught and the kind of reading and writing learners are required to engage with. Theoretical links to Coffin (2006 a, b, c), Martin (2007) and Schleppegrell (2012) are drawn. The influence and relevance of SFL to the study is discussed. The purpose of the chapter is to note how the various categories of data shift in each textbook, and for this, well crafted tools were necessary. The links with theorists provide a conceptual toolkit and a language of description that would assist in drawing conceptual maps. A mind-mapping technique is applied across all textbooks and the categories from the conceptual maps are reflected in tables, affording textured descriptions of data. All maps and tables are included in the thesis. A discussion of the findings is presented at the end of the chapter.

Chapter Seven presents the third and most intensive level of all the stages in the analyses. Level Three occurs in three steps. Step One sets out to investigate institutionalisation of texts by coding and analysing segments of the texts according to a coding key. Using the language of description of Bertram (2012), the results are recorded and represented in tables for discussion. Step Two deals with an inquiry into historical sources, once again linking with theory to understand how textbooks deal with sources and how this advances the notion of progression in historical thinking across the grade continuum. The purpose of engaging with these sources indicates what types of sources are used, whether the sources are used in specialised or generic ways and this gives clarity to the notion of progression. It also provides insight into how these textbooks engage with disciplinary history, where sources are used as evidence. This is viewed through the graded textbooks under study.

While Chapter Five, Six and Seven all present in-depth discussion of findings, the purpose of Chapter Eight is to bring the components into an integrated whole. This chapter shows how the parts of the thesis work in tandem to answer the research questions incrementally. It returns to the categories of each level of analysis and discusses how they contribute to the building of an understanding of progression. All the categories are listed, and their purpose and results charted.

Chapter Nine concludes the thesis with some of my personal reflections and concluding remarks on the analysis, the methodology and the overall relevance of the study in South Africa. The rationale for using textbooks as objects of analyses is illuminated. Textbooks ought to be receiving due consideration, as they remain core teaching and learning tools in the history classroom. This final chapter echoes the importance of the history textbook and reveals why it is a timely study, considering the political undercurrents driving for history to be a compulsory subject at school.

1.8 Conclusion

Traditionally, the introduction of a thesis provides a summation of details deemed essential for the understanding of the topic. Here, the phenomenon of progression in historical thinking is introduced, so as to lay the foundation for ‘what’ the study is about. I have described the aims, purpose and focus of the study. ‘How’ the study intends to answer those questions is exemplified in the research design and methodology. An outline of the thesis operates, finally, to show how the parts of the thesis come together to explain the structure of the investigation. The following chapter deals with existing global, ‘cutting edge’ literature on and around the topic of the investigation, as well as providing an in-depth survey of dominant theories and concepts that engage the field of knowledge progression.

CHAPTER 2

LITERATURE REVIEW

2.1 Introduction

A literature review is described by Mouton (2001, p. 87) as the “exhaustive encapsulation of existing and credible and recent scholarship on the research problem”. A researcher draws knowledge of authoritative scholarly theories and conceptualisation of issues from the broad base of accumulated scholarship. The evidence informs the researcher of what instruments were used, to what effect and what was found empirically. Thus the researcher gains valuable insights into the empirical findings in the field of study and recognises instrumentation that has proved to be valid and reliable.

This chapter aims to capture the essence of such scholarships described by Mouton (2001). In order to understand progression in school history textbooks, I reviewed literature in various fields, commencing with history as a discipline in order to describe its present shape and purpose and its form as a school subject in a curriculum, and how it is taught with regard to the use of the textbook in South Africa and elsewhere. I further examined predominantly national and international textbook research studies that could add value and understanding to the key objective of this study. Studies in SFL and history education were also consulted for their relevance to the phenomenon. While the review presents an examination of existing educational research, it also identifies gaps and silences on issues that relate to the critical questions of the research. Studies that have used content analysis as their methodology of analysis were also critiqued, while also reflecting on different kinds of instruments other textbooks studies have engaged. Emerging from the literature are countless studies in the realm of history education and textbook analysis and, therefore, choices had to be made to constrain the review to pivotal national and international studies that relate specifically to the theme under study.

For purposes of easy reference, I divided the review into three sections, each engaging with different themes. The first section engages with literature on textbooks generally, their conception and their background as a teaching and learning resource, while also

examining its global impact and role. It also deals with how textbooks have been analysed and what the foci of those analyses were. In order to elucidate the present shape and form of the South African textbook, it was necessary to engage with the nature and purpose of history, South African curriculum reform and the key changes in history, to describe the new shape of the South African history curriculum and its textbooks. These matters are engaged with in the second section of this chapter. The third section of the review deals with conceptual issues of progression in the textbooks, the cognitive structure of the textbook, as well as how learners' reading and writing can be impacted by this structure or genre of the textbook.

2.2 The textbook

2.2.1 Defining a textbook

Goslin (2015), in the research project for Educational Technology (ETEC 540), defines textbooks as printed artefacts for each year of study with facts and ideas around a certain subject, made by a corporation to follow a set standard curriculum for a school system or larger organisation (citing from *Encyclopaedia of Education*, 2008). Goslin adds that while the presentations of textbooks have altered over the years, its objective of building a platform of knowledge has not. Morgan (2011, p. 12) states that, "textbooks represent a sample of a body of knowledge, which can be understood to pass on a socio-cultural inheritance, coded in language, as they record the education system's epistemological position in a 'slice in time' with a prevailing mind set in it." According to Husbands (1996, pp. 88–89), "the principal tools we have to develop our pupils' understanding and awareness are words: their words, our words and words of actors in the past as they are presented to us in documents, or as textbooks". Textbooks, therefore, are powerful tools, bringing into the classroom the curriculum of the time. As a tool of teaching and learning, textbooks are used by both teachers and learners to acquire subject knowledge and to direct classroom and homework activities.

2.2.2 The history of the textbook

The earliest textbooks, maintains Goslin (2015), had been printed on clay tablets, scrolls and papyrus. As early as the 16th century textbooks were available in Latin, the common language of schooling. They were used in Greece, Rome, China, India,

Egypt and other early societies. Ellsworth, Hedley and Barrata (1994, *ibid*), argue that Aristotle had created textbooks for educational purposes such as instruction. Bierman (2006) cited by Goslin (2015), argues that textbooks were used as a static means to teach the curriculum in the 19th and 20th centuries. However, current trends in pedagogy show that methods of instruction have become more balanced and include other educational media. Supplementary materials include audio and visual files, the Internet, work books, graphics, exercise books and computer access materials (Goslin, 2015). This list includes online electronic and PDF books. It seems that while there are many others available materials, research in wealthy nations has shown that the vast majority of teachers still continue to rely heavily on the textbook as their core teaching resource (*Encyclopedia of Education*, 2008, cited in Goslin, 2015).

2.2.3 The role of history textbooks

There is international acknowledgment among scholars that textbooks are significant in delivering organised knowledge which society has marked as truthful and legitimate (Dean, Hartman & Katzen, 1983; Sleeter & Grant, 1991; Apple, 2000; McKinney, 2005; Green & Naidoo, 2008; Chisholm, 2013). LaSpina (1981, p. 1) maintains that, "History textbooks seem to occupy a place in education that is similar to traditional religious sacred books, transmitting our past and cultural heritage". This view is reinforced by the *Report on History and Archaeology* (2000, p. 13), which propounds that "The place of the History textbook cannot but remain central to the cause of an improved History education". Chisholm (2013, p. 9) elucidates that, "the importance of textbooks and their role in ensuring quality of learning for all has been long recognised in the international context". A textbook serves as the cheap, accessible and portable accessory for the teacher of history and is a valuable resource in the classroom regardless of approaches used. Teachers implementing a new curriculum may be unsure about their own knowledge and may utilise textbooks even though they are inadequate. Some have utilised the textbook without referring to their curriculum documents, as they are aware that textbooks follow the curriculum closely. As some textbooks are manufactured with a learner's book and a teacher's guide, much of the teacher's work with regard to lesson planning and assessment has been covered by the textbook. Consequently, many teachers utilise the textbooks for information around content and pedagogy. This would save them time on lesson planning and the search for resources would be minimised, as textbooks have been

advanced in form and content by technology to create colourful and sophisticated presentations of the past.

A survey conducted by the Association of American Publishers and National Education Association (1996) showed that 70% of teachers who responded used textbooks weekly and most used them every day. Moulton's (1997) large scale research project in various countries like the Philippines (Heyneman & Jamison, 1984), Uganda (Heynemann & Jamison, 1980), Nicaragua (Jamison et al., 1981), Thailand (Lockheed, 1986), Nigeria and Swaziland (Lockheed & Komenan, 1989) concluded that students do better on tests when textbooks are in the classroom. Evidence in the United States showed that some teachers relied too heavily on textbook use as compared to countries like Botswana, Chile and Ghana, where the use was minimal. Woodward and Elliot (1990, p. 8) concluded that teachers' dependence on textbooks arose because they were less experienced, their subject matter expertise was weak, and some teachers and administrators believed that textbooks held content expertise and authority; expectations by parents; cultural support for their use; seemingly high-quality design; and apparent congruence with curricula.

In South African classrooms, the place of a history textbook is critical, as many teachers do not have access to other forms of media or even subject knowledge (Bloch, 2009). In fact, some of the teachers required to teach the subject of history have no training in history or history content knowledge and, as a result, have to access other means to obtain content. Whereas, specialist history teachers understand the discipline and its unique methodology. It is, therefore, difficult to envisage how a novice to the subject might inject the necessary skills that are required to teach history. Textbooks are required to cover prescribed content and to cater for different cognitive levels by the presentation of learner activities, and they also sequence and pace learners according to the time stipulated on the department's policy document. As such, they could be a valuable instrument for any educator that is required to teach history. This view is endorsed by the Minister of Basic Education, Angela Motshekga, who maintains that a textbook is the most "effective tool to ensure consistency, coverage, appropriate pacing and better quality in terms of instruction and content" (Motshekga, 2009, p. 1). Presently, textbooks are purchased in bulk for use by learners, as policy dictates that each child should have a textbook in the subject.

2.2.4 The history textbook as a source of information and a historical source

Many hold the view that a single textbook is insufficient as a learner or teacher resource (Morrel, 1990; Chisholm, 2008; Mathews, Moodley, Rheeder & Wilkinson, 1992). Mathews et al. (1992) assert that textbooks should form the framework on which a lesson is constructed and should not be the vehicle to transmit historical knowledge. They argue against the textbook being the only resource in the classroom, stating that many texts can serve as sources which could offer divergent and contrasting interpretations to the same event. In this sense, learners will be ‘doing’ history like a historian. Various critical interpretations can be formulated from the perspectives of diverse books. The focus of history is to encourage learners to be critical thinkers, and when textbooks are used to develop learner awareness of different views, they become sensitised to the methodology of the historian. Tosh (2006, p. ix) contends that historical knowledge is conditioned by the character of the sources and the methods of the historians who work on them, arguing that rigorous critical method is the hallmark of the modern academic historian.

According to Tosh (2006, p. 58), a historical source “encompasses every kind of evidence human beings have left of their past activities—the written word and the spoken words, the shape of the landscape and the material artefact, the fine arts as well as photography and film”. Tosh, therefore, argues that the modern discipline of history consequently rests not on what has been handed down by earlier historians, but on constant and precise critical reassessment of the original sources. External criticism is directed at establishing a document’s authenticity, who the author is, the place of publication and the date of writing. Internal criticism is levelled at the content of the document, which needs examination for consistency (*ibid*).

Textbooks are designed to incorporate a number of different activities which can be homework exercises, case studies, projects, assignments, reading or independent study. However, when these activities from various books challenge learners by presenting a wide variety of perspectives, learners are motivated to consult and analyse them for authenticity, developing analytic skills and making interpretations which, in turn, generate greater understanding of how history is constructed. Traditionally, history textbooks were associated with the presentation of large

numbers of facts that had to be absorbed. Visually stimulating material such as colourful graphs, tables and word banks and cartoons were largely absent from these textbooks. My earlier study of Bharath (2009), on the presentation of knowledge of ‘old’ and ‘new’ textbooks, shows visuals of the ‘old’ textbooks which indicate portrait-like pictures of statesmen, supported by a large amount of facts. Presently, pictures, cartoons, maps, photographs, diagrams and documents are some of the lively, stimulating and inter-active materials that are used to engage the learner in a re-defined or ‘reconceptualised’ discipline. History as a discipline and as a subject in a school, essentially has the common goal of harnessing specialised skills of interpretation, deduction, evaluation and synthesis in a learner. Engaging with evidence in sources allows the learner to acquire understanding of the concepts of time, space and position in relation to the past. Learners are thus geared with critical development skills to benefit them in any profession they choose.

A consideration for the study of history textbooks in the primary school is advanced by Harnett (2003), who claims that there is limited research in this arena, drawing from a study by Blake et al. (2003), which explores language in primary history textbooks and discusses the importance of selecting texts to aid children’s explanatory understandings in history. Harnett (2003) argues that while the links between literacy and history are acknowledged within *History and the use of language* (Schools Curriculum and Assessment Authority, 1997) (SCAA), there is concern over these links dwarfing good history teaching, citing Blyth’s (1998) reminder that literacy is a tool, not a master for history. In addition, it is argued that the focus on literacy is weakening the distinct subject boundaries of history. The SCAA’s (1997) report that many children’s history books only touch briefly on particular events or features, and note that detailed narrative accounts of events are rare and that lack of detail reduces children’s opportunities for making considered judgements about the past. There is also concern over the neglect of documentary sources. The provenance of sources is not always acknowledged and the report of the SCAA notes difficulties of interpreting sources with the limited background information which some texts present. Certain schools in the UK are progressive, as Key Stage 1⁶ children are presented with twelve stories with a word limit of three hundred and fifty words, told by a range of different

⁶ Key Stage 1 is the legal term for the two years of schooling in England and Wales where pupils between 5 and 7, might attend first or primary school. This is normally known as Year 1 and Year 2.

authors and illustrated by different artists, using a range of strategies, including use of direct speech, text repetition and pictorial clues to enable young children to derive meaning from the text. The stories cover a range of historical periods, including true stories about famous people and fictionalised accounts of people and children from the past. Women and children are represented in the titles and some account of cultural diversity is given with the inclusion of Tutankhamen. Alongside the stories, five topic books introduce children to ways of life of the past, since the Second World War, using simple text, original photographs and artists' illustrations.

In South Africa a learner can only get what the school can afford to buy. The luxurious packs described by Harnett (2003) are beneficial to learners in the UK, but they are much more fortunate than our learners in the public schools who are entitled to one textbook in the social sciences, covering both history and geography. Schools have to purchase textbooks for other subjects, so this calls for much streamlining in their finances. There is a lot of weight placed on the selected text for a particular subject, which may be all that a learner can access for the study of history in a year. This is why analysing texts would show what and how content is represented. One could argue that compared to the texts in the UK, the single text for South African history and geography is not enough to provide all the information necessary for a particular grade. The restriction to versatile content raises questions on how detailed the historical accounts are and whether they actually are sufficient for children to make considered judgements about the past. In poorly resourced South African classrooms, a lack of access to a wide variety of history texts compromises the quality of learning. The point of disciplinary history is to allow various sources and evidence to direct discussion and, even with schools facing financial restrictions, the effect of a single textbook must surely be questioned. For this reason, one of the recommendations growing out of KwaZulu-Natal's colloquium (2015) on the centrality of history in South African schools involved the inclusion of a novel in history to supplement the textbooks currently in use.

Analytical history is perhaps a new way of referring to the change in history by the manner in which textbooks can be used as sources. In South Africa these changes were already noted when Chisholm (1981) claimed that pupils could be taught to inculcate critical attitudes by introducing them to techniques that would help them identify bias and propaganda in texts. Chisholm (1981) argued that textbooks could

distort whole sections of history, but that history teachers should allow learners to discover this by themselves. Pupils should be guided on how to ‘reconstruct’ history by analysing evidence or historical documents in specialised ways that involved a mode of questioning that related to the identity of the individuals who wrote the document, what their intended or unintended motives were and which factors affected their opinions.

2.2.5 The effects of curriculum changes in history on textbooks

Changes in the history curriculum have resulted in changes in textbooks, their methods and approach, as well their style. Textbooks have been adapted to academic historiographical changes and for their utilisation in schools. This is done because there is consensus that textbooks form essential teaching and learning support material. Before the 1900s, it appears that textbooks were the academic curriculum. Questions are also raised on whether textbooks lead or reflect the curriculum because they are designed to follow the curriculum closely. In the 1970s and 1980s, studies undertaken on the instructional quality of books in America show textbooks to be wanting in their instructing rhetoric, organisation and design (Elliot & Woodward, 1990).

In the United States, editors Elliot and Woodward (1990) characterised the textbooks as an enduring and influential part of schooling. Having originated in the United Kingdom and the United States of America, ‘alternate’ views of history teaching contributed to a shift in methodology and the approach to the teaching of history and representation in South African textbooks. In the present era of textbook reform, this resource is increasingly scrutinised, as it is a key factor in improving educational quality. In the United States, as well as elsewhere, there are questions on how textbooks are published and marketed, what factors influence their selection, how they are used, what quality they offer, and very importantly, what their future is in the light of a burgeoning technology that affects a myriad of instructional materials. Since 1970, these questions have gained significant ground, as textbook research and as a conventional scholarly endeavour (Elliot & Woodward, 1990). Textbooks are critiqued for their representation of content, their use by teachers and students, and their value as teaching and learning aids, as well as for their social and cultural biases. The industry that produces them has been accused of mediocre workmanship (*ibid*).

Analysing workmanship, with the objective of transformation and reform, is part of the much desired textbook research.

The post-modern era has bequeathed the textbook an alternate style, with visual and textual presentation giving a sense of realism to it. Past portrayals in black and white or grey and white featured in a period which was constrained by lack of innovation and technology. Rob Witting (cited in LaSpina, 1981, p. 60) describes traditional social studies books as “dry, sanitised and uninteresting, the dullest of presentations”, and construes the images as “add-ons, always squared-up (boxed), poorly positioned on the page, and usually very muddy, poor (quality) production”. ‘New texts’, it is argued, are larger, better illustrated, and seem appropriate to students and teachers, as they articulate new design principles. The competitive marketplace has thus become a challenge to publishers, as they strive to ensure that their product conforms to current and transformational views.

In addition, Godlewski (cited in LaSpina, 1981, p. 63) attributes the alternate ‘style’ of presentation to a notion of ‘literacy’ that is tied to discursive processing of information. The textbook author, thus, serves as an ‘architect’ so that pages of the textbook are structured to represent pre-decided percentage ratios of visuals to text. This is in keeping with LaSpina’s argument that the two components of the new textbook design, namely the visual and instructional, must prioritise the aesthetic visual dimension over the instructional, as a standard multilayered page convention requires that there is white space with different forms of text, diagrams and photographs. However, the organisation is sequenced so that the eye moves through the visual space to read and absorb. Karen Wixson (cited in LaSpina, 1981, p. 100) adds that instructional design of the text is a model of the thinking process where there is a logical flow of information or coherence (causes and consequences, background, event). The new textbook, with its engaging and structured presentation, becomes a powerful tool to facilitate comprehension, reading and retention, and perhaps progression. In order to ensure that the development of expertise is not compromised, Winch (2013, p. 128) argues that different types of knowledge should be presented in a sequence that matches not just the needs of the subjects, but also that of the student. Beckett (2004) indicates that the acquisition of concepts is shown through the learner’s ability to employ those concepts through the use of the

appropriate linguistic expression for those concepts (cited in Winch, 2013, p. 132). This can be seen in the language of the textbook, the written tasks/exercises that appear in the textbook, and those that are produced by the learner orally or in writing.

2.2.6 Textbook studies in a South African context

Several studies have shown that for decades South African textbooks were entrenched with racism, sexism, stereotypes and historical inaccuracies (Auerbach, 1965; Du Preez, 1983; Esterhuysen, 1986; Sieborger, 1992; Bundy, 1993 as cited in Engelbrecht, 2005). Sieborger and Reid discuss findings of the 1994 Workshop on School History Textbook Writing in their article entitled *Textbooks and the School History Curriculum* (1995). Sieborger and Reid (1995) describe the challenges facing history as a school subject when they investigate the identity that textbooks promote. Engelbrecht (2004) discusses representation in a particular Afrikaner textbook series *Ruimland*. In Engelbrecht's later work (2008), she examines the impact of role reversal in representation practices in history textbooks after apartheid. Her research on textbooks in South Africa focuses on aspects like 'ideology', 'representation', 'Eurocentricity' and 'apartheid prejudices'.

Likewise, McKinney (2005, p. xi) considers aspects such as gender, class and disability in her analysis of how current textbooks reproduce and reinforce a non-apartheid "vision of a non-racist, non-sexist, equitable society". Existing research in the realm of knowledge representation in a South African context is limited. The local textbook audit by Kros (2002) involves a content analysis of Grade 12 history textbooks published in the late 1980s, revealing a clear apartheid bias. The audit showed that there were good textbooks available that made their historiographical and values framework explicit, encouraged thinking skills and avoided one-dimensional thinking, but that they were in the minority and difficult to access in the rural areas. Chisholm's (1981) study on ideology in history textbooks argued that pupils should be taught how to recognise bias and propaganda by inculcating a critical attitude to all material given to them.

Morgan (2011, p. 4) describes her textbook study as her "own hybrid of hermeneutic analysis, discourse analysis, visual analysis, question (pedagogic) analysis, critical analysis, and semiotic analysis", undertaken to decode the strategy of textbook

constructors. Her South African literature review showed study engagement with race, gender, bias and ideology and on the politics of curriculum transformation rather than theoretical and methodological problems of analysis. Amongst those she reviewed, were those focusing on old history textbooks which perpetuated segregationist ideals (Dean, Hartman & Katzen, 1983; Auerbach, 1965), those featuring a disappearance of White Afrikaner history from textbooks (Pretorius, 2007; Visser, 2007; van Eeden, 2008) and those featuring white and black role reversal, showing the Afrikaner Nationalist being replaced by the African Nationalist (Engelbrecht, 2008).

While Bertram and Bharath (2011) interrogate history textbooks for disciplinary content, their study focus is on knowledge structures and how new history textbooks present everyday knowledge and procedural knowledge. They argue that some of the textbooks designed for the curriculum at the time of their investigation were limited in their representation of content, showing a prioritising of everyday content. Waller (2009) applied Fairclough's analytic instrument to determine that a range of Grade 10 South African textbooks were a far cry from international versions of historical literacy, historical literacy being the sum of a number of factors which contribute to the mastery of the discipline.

The bank of studies in South African textbook research is thus engaged in themes that focus on areas such as prejudice and writing a new history for South Africa (Bam & Visser, 1996), concept representation (Matoti, 1990; Ranchod, 2001), national narratives (Von Eden, 2008; 2010), ideology and citizenship (Chisholm, 1981; 2008), indigenous representation (Mazel & Stewart, 1987), xenophobia (McKnight, 2008; Duponchel, 2013), diversity (McKinney, 2005), gender and representation of women (Nene, 2014; Schoeman, 2009), methodological issues (Morgan, 2013), historiography (von den Stein, 1997; Bundy, 1993), history and morality/empathy (Von Borries, 1994), democracy and the representation of Mandela (Mashiya, 2000; Van Niekerk, 2014), heritage (Fru, 2012; Fru, Wasserman & Maposa, 2013), holocaust depiction in history textbooks (Koekemoer, 2012), cultural identity (Kwang-Su, 1999), race (Morgan, 2010; Engelbrecht, 2005, 2008; da Cruz, 2005; Dean & Hartman, 1983), nation building and values (Ndlovu, 2009), curriculum and knowledge (Bertram, 2009; Bharath, 2009, Bertram & Bharath, 2011; Firth, 2013), historical consciousness (Kwang-Su, 1999; Van Jaarsveld, 1989; Mazabow, 2003;

Van Beek, 2001) and historical literacy (Waller, 2009; Maposa & Wasserman, 2009; Wasserman, 2008).

The studies mentioned above are focussed on history and its textbooks in South Africa, but their domains and objectives are clearly different from the present study. Perhaps this is because it is difficult to define 'progression' for a subject like history. Bertram's (2012) development of the 'historical gaze' opens up ideas on disciplinary history, and her later paper on how school history curricula map disciplinary progression (Bertram, 2014) describes progression in both substantive and procedural history knowledge in four high school history curriculum documents. Here, she argues that there are four recontextualising principles which inform the selection and the pacing of history knowledge in these curriculum documents, and these are: space; chronology; the nature of the substantive concepts which progress from generic concepts, to unique historical concepts, to universal concepts; and, finally, the extent to which curricula chose to develop procedural knowledge in the discipline (p. 1). She further contends that it is not clear how disciplinary procedural knowledge finds progression in the four curricula. She purports that research has been done on progression in historical thinking in classrooms, but that this is not reflected in the curriculum documents, which do not map progression in procedural knowledge clearly. Green and Naidoo's (2008) focus on progression, is in the area of science, which differs markedly from history.

South Africa's vast experience and history of apartheid has left an indelible mark on its future education. While the damage can never be eradicated and its history can never be undone, its history can be told from a multitude of perspectives in order to create a balanced view of the past. That is then the task of present and future historians. Erstwhile, there are other stories to tell, and for me, the 'story' of history and progression is one I strive to tell. It is an interesting avenue of study that opens up discussions and debate on the newly named CAPS history curriculum and how progression in historical thinking is reflected in textbooks.

2.2.7 Textbook studies in the international context

A plethora of international studies were accessed to determine the trend of research in the different contexts and to carve a niche for the present one. The Georg Eckert

Institute for International Textbook Research in Braunschweig, Germany, proved to be an excellent bank for international studies, as well as for those of its own country. It was here that a multitude of studies emanating from Germany and other European countries, non-European countries such as the USA, Canada, China, Hong Kong, Taiwan and Australia was accessed. The common directions or themes arising from the analysis of history textbooks in these different contexts ranged from a focus on images of Europe in secondary school history textbooks in the People's Republic of China (Yang Yan, 2014), to the depiction of Germany in its own history (Bethge, 2014). There was also a focus on teaching practices, using printed textbooks in Argentinian elementary schools (Romero, 2014), as well as research on historiographical work in Chilean textbooks (Minte, 2014). Textbook representations of political division featured in contemporary Greek history textbooks (Bilginer, 2013), and a study of textbooks in Malta (Vella, 2010) focused on how historical thinking skills and the evidential method were incorporated into a textbook. Christopher (2012) analysed discursive strategies in Lithuanian textbooks to make sense of post-communism, while issues of myth and nationalism were highlighted by Schnirelinan (2010) in Central Asia and the Caucasus. In Armenia, Zolyan and Zakaray (2010) dealt with the image of the self, the other and the enemy. Similarly, Schlissler (2006) tackled the challenges and new perspectives for history teaching in Europe. A content analysis of Spanish textbooks through first year secondary school (Holley-Kline, 2013) focused on reductionist views of history presented with new texts omitting important details in history like time, periods and concepts. The abovementioned studies are among those currently on the pages of *Eckert Beiträge*, which presents international published articles, many of which are two-way blind reviewed (both author and reviewer identity is unknown).

According to LaSpina (1981, p. 1), the passage of time and newer versions of curricula have demonstrated a trend towards greater inclusivity (multicultural approach, ethnic and racial recognition). They argue that transformation has resulted in further changes towards a national identity or traditional citizenship away from this multicultural diversity approach. Löfström (2009) recognises that while issues of factual precision and balanced textbook content is relevant, there has been too much focus on these areas when there are other questions and perspectives. Professional historians and history teachers seek different answers from different questions. There

are innumerable angles and perspectives to the concept of textbook research. Historians seek to investigate knowledge content for balance and accuracy by delving into the representation of accurate historiography, cognitive level of learners, among other things.

A line of research that followed alternate trends was the investigation into the Dutch and American method of teaching history. According to Havekes et al. (2009), the Dutch method of teaching seemed to accord with Wineburg's (1991) method of source analysis. Dutch students were taught to acquire the "heuristics of a historian (sourcing, corroboration and contextualisation)" (Havekes, 2009, p. 2). While Dutch learners learnt 'tricks' of sourcing, they lacked the understanding of historical meta-concepts like time, change, cause, evidence and account. Dutch students, at that time, also did not learn historical facts and chronology. American learners, by contrast, acquired a lot of facts, but were not able to use the ways of a historian when analysing sources (Wineburg, 1991). Thus, in the nineties, criticism levelled at Dutch history teaching focusing on skill, resulted in the curriculum being changed. Dutch curriculum change in 2007 resulted in the removal of the thematic narratives focusing on skills, and concentrated instead on a chronological frame of reference consisting of 49 characteristic developments of ten eras going back to pre-history. Although this curriculum is still in its infancy, Havekes (2009) argues that there is strong indication that the new curriculum leads to a better chronological understanding and more knowledge of historical facts by students.

2.2.8 Methods of textbook analysis

Different methods of textbook analysis are being conducted around the world. Different people are directed by their personal interests on what will materialise as a focus of their analyses. Historians are concerned about the content of history. Different perspectives of similar content can result. Stoffels' (2007) survey of international and national literature reveals a lack of research on the practice of designing and producing textbooks. Many studies of textbooks tend to highlight social aspects like race and gender, indicating that they are using methodologies of content analysis, but the tool which is used to complete the actual analysis is not sufficiently explored. In fact, Nicholls (2003, p. 11) suggests that methods for textbook research are underdeveloped. He argues that while the Georg Eckert Institute in Germany and

Michael Apple in the USA have done significant work to develop the field, considerable studies have arisen, but without much engagement with the methodological field.

Pingel (1999) and Stradling (2001) indicate that too little work has been done on textbook research as a methodology (cited by Nicholls, 2003). It is indeed an area that must be developed, considering the significant role of textbooks in classrooms. Developments on generic method for textbook research have been qualified as a “gaping hole in the field”. Detailed guidelines need to be set out on how to construct methodological instruments for analysing texts. Generally, analysers list appropriate questions which are used as criteria for analysis. There is no common set of criteria to analyse textbooks, although there have been some with generic methods for analysing that involve broad or universal criteria which can be used across different subjects or fields of study.

Saele (2009) argues that textbook analysis in Norway, though a scarce field, produced analyses which mostly portray conflicts and antagonisms, the primary purpose being to detect political bias. Saele (2009) discusses how a scientific article published in 1982 is still used as a theoretical framework for studies today in spite of extensive historical didactic development in Norway. Considering this inadequate, Saele (2009) suggests an alternative approach that erases the factor of bias and personal judgement, while promoting an interpretation of history books by analysis, independent of their historical, political and cultural contexts within which they work. Similarly, Haydn (2009, p. 4) recommends further research on ideological and political facets of history textbooks as well as exploration of what might be termed pragmatic, functional and pedagogical aspects of textbook use.

Content analysis can be undertaken in various ways. Vinterek (2009) suggests that both visual and textual content of textbooks be analysed to determine whether they meet the requirement of teachers and whether they support what “school and politics intend to mediate”. Apple (2000) also argues that multiple and contradictory meanings are accessible from a singular analysis and that the text needs to be deeply 'mined' for meanings at three levels: Surface (style, organisation, content, questions, illustrations and types of history); Account (Reliability, balance); and Polemic

(inferring author's personal values) (Edwards, 2008). I argue that there is another level below the surface, where there is a world of data that needs to be recognised, excavated and analysed, as it constitutes the 'shape' or 'form' of knowledge. Christie and Martin (2007, p. 4) suggest that, "What was needed was the development of a theory that would deal with the structuring of knowledge itself". Bernstein (2001) refers to this as the underlying principles that characterise knowledge structures. Bernstein's theorisation of knowledge will be addressed later in Chapter 3 explaining the Theoretical and Conceptual Framework of the study.

In South Africa a similar situation arises around the analysis of textbook content, where there are various ways in which analysis of texts can be undertaken. Individual choices are dependent on the phenomenon being analysed. Weinbrenner (1992) argues that there is no "theory of the textbook" upon which to construct a methodology of analysis. As a result, Morgan (2011) argues for an interdisciplinary approach to textbook analysis, because of the void in text analysis methodology. She developed a tool to add to the methodology for inquiry into textbooks which, she purports, can be used in other subjects. Along alternate lines, Maposa (2014) uses Fairclough's methodology of critical discourse analysis (CDA) to analyse four contemporary South African textbooks created for the National Curriculum Statement (NCS), with the intention of understanding the nature of African consciousness constructed in them. He argues that CDA is not originally linked with textbook analysis, but that there are an increasing number of studies that are using CDA (p. 14). He argues that CDA methodologies focus on language (Johnsen, 2001; Peräkylä, 2005) and context (Crawford, 2000; Naseem, 2008) rather than content analysis, as it has a weak theoretical grounding. Waller (2009) also uses Fairclough's analytic instrument to determine how historical literacy manifests itself in South African history textbooks. Likewise, Koekemoer (2012) indicates, in her study of the dominant discourses in Grade 9 South African history textbooks, that narrative inquiry is a branch of Fairclough's (1995) three dimensions of discourse (CDA). The choice of the methodology is thus dependent on the objective of the study. For instance, CDA traditionally "studies the way social power, dominance, and inequality are enacted, reproduced, and resisted by text and talk in the social and political context" (van Dijk, 2001, p. 352). Similarly, other studies may choose alternative methodologies, guided by their purpose and intent.

2.2.9 The selection and promotion of textbooks at schools

Textbooks in South Africa are produced out of a complex interaction between the National Curriculum, Provincial Education Departments and textbook authors, publishers and evaluation committees (Stoffels, 2007). Stoffels (2007) uses Bowe, Ball and Gold's (1992) notion that educational policy is constructed and reconstructed within three contexts, namely the context of influence, textbook production and classroom practice. The state directs much of the textbook production process, while creating policies that have to be adhered to by publishing houses. The state, influenced by its own ideology, decides what knowledge is to be included in textbooks. The publishing houses work on the guidelines given by the state on curriculum coverage. The textbooks produced must comply with the ideology and knowledge prescribed by the state in order for their textbooks to be approved for use in schools. In order to make an income from their authorship, textbook authors, informed by their publishers, also comply with state prescriptions. In order for their books to be recommended by the selection committee, it becomes imperative for the textbook to cover the curriculum closely.

In South Africa, textbooks first have to appear on the Department Catalogue for Learner and Teacher Support Material in the respective Band, that is, the GET or FET Band, as each of the bands has their own catalogue. The appearance on the catalogue means that they satisfy the requirements of the curriculum in use and individual teachers or schools make their selections from the numerous publishers appearing in the list of books. The textbook and publishing industry has thus become very competitive, as many of them are actually on the catalogue. Teachers have to view the textbooks before they make a purchase. Publishers strategically provide free or promotional samples of textbooks at workshops, school staffroom displays and teacher meetings to advertise and promote their books. Teachers are not pressurised by the Department of Education to use any one of the listed textbooks. Nor are curriculum advisors required to recommend any specific text to teachers. However, at a recent CAPS language workshop, the subject advisor brought along the entire package put together by a single publisher (a learner's copy, a teacher's guide and the associated reader). The subject advisor insisted she was not promoting the publisher, but that was the only publisher which provided her with a sample. She then went on to

say it was ‘very good’. Many of the teachers present at the workshop came out in strong support of this publisher and acknowledged that they were also using those books in their classrooms. There are thus ways in which publishers advertise their textbooks, even to the extent of calling at schools, arranging book displays and surreptitiously utilising the services of subject advisors and managers at schools. Over the years, certain publishers have built up a reputation with educators and it is that which generally guides the selection process.

It is understood that textbooks present different interpretations and the curriculum is designed to consider all interpretations of history. For this reason, no single book can be recommended as a prescribed book. Teachers will evaluate and select books according to their needs. Usually, they select according to how adequately the text covers the curriculum and whether exercises are learner centred and activity based. Even though textbooks are bought for learners and teachers to use, it should not be the only resource that can build a framework for the lesson. In fact, teachers should be accessing a variety of sources or textbooks so that different interpretations can be studied and evaluated. The fact that a book is new and is labelled as representative of the new curriculum by prominent publishers does not imply that the content of the textbook adequately represents the requirements or principles of that curriculum. It is crucial to view how textbooks achieve this balance, while concurrently addressing issues of chronology, progression and historical thinking. The textbooks should be examined to ascertain the extent to which they follow curriculum specifications, recommendations and guidelines.

2.3 The shape of history and South African curriculum reform

2.3.1 The nature and purpose of history

The complexity surrounding the nature and purpose of history concerns theorising the ‘truth’ about the past. According to Mathews, Moodley, Rheeder and Wilkinson (1992, p. 3), history is derived from a Greek word ‘*historia*’ meaning ‘enquiry’ — a search for the truth. That it was possible to arrive at the ‘historical truth’ by examining the evidence of the past, was the belief of nineteenth century historians. History was the study of the past ‘as it was’. This traditional view of history is the idealised ‘objective’ model, which contrasts with the late 20th century ‘relativist’ outlook where

‘fact’ and ‘objectivity’ are challenged. Marxism, inter-disciplinary connections, feminism and post-colonialism undermined this traditional view. The realisation that objectivity in history may not be possible has given way to a more current, tentative formula of knowledge, replacing earlier certainties.

The validity of ‘truth certainties’ is questioned by postmodernist theories and they hold the view that there is no single position from which the study of the past can be told (Southgate, 1996, p. 7). History, according to Southgate (1996) becomes no more than a tentative hypothesis underpinned by a specific purpose. A historian describing an event may foreground certain details he considers relevant, while other details become part of the background. A scientist can repeat experiments and gain a higher objectivity, whereas historians cannot predict with any certainty. History, by its very nature, is therefore different from science. The epistemology of a subject like history can, therefore, be understood in two different ways: one way is to recognise it as ‘fairly objective’, and the other is to recognise its ‘constructed’ or ‘subjective’ nature. It might seem contradictory that history can be viewed as ‘objective’ on the one hand and then ‘constructed’ on the other. Kissack (1997, p. 214) states that “Knowledge itself is conventionally associated with truth and objectivity”, but in transmitting the history of South Africa’s controversial past to learners, certain presentations of the past can be disqualified from the status of objective truth. Many books can be written about the ‘objective, truth about South Africa’s past’, but there are many versions of this ‘truth’ and the controversies about the historical truth in terms of facts and evidence (Kissack, 1997, p. 215). It is possible to formulate interpretations and conclude arguments by understanding the complex human element in history. Historians can, therefore, interpret the same evidence in different ways and conclude their arguments differently. Bias, prejudice and different beliefs may produce different interpretations of the same past. The craft of the historian is to excavate below the surface of the events they are investigating and establish more about the ‘why’ of the event (Mathews et al. 1992). The existence of historical evidence adds to the ‘objective’ understanding, as the historian is obligated to record events in an accurate manner (Kissack, 1997, p. 216). Assessment and synthesis of a variety of sources or evidence about historical events may assist in the construction of a viable and ‘objective’ story that itself will assist learners towards developing a wide view of the past. The discipline of history itself allows learners to use these various accounts

of the ‘truth’ towards recognising the past. Even the inaccurate or biased versions cannot be discounted, as they present a perspective and learners should be able to use their analytical skills to identify the inaccuracies or bias in the light of other evidence. The nature of the discipline is foregrounded as learners contest the ‘objectivity’ of the versions presented.

Originating in the United Kingdom and the United States of America, ‘alternate’ views of history teaching contributed to a shift in methodology and the approach to the teaching of history in South Africa. Martha Howell, in *History writing from the Margins in CUNY Panel’s History* (1997), indicates how a new scholarship on gender, race, ethnicity and class, affected history, providing for the rights of racial and ethnic minorities and workers. A new paradigm was incorporated by the variables of the discipline of history. Such an expansive paradigm shift has not been restricted to content, but in fact involved historiography, the actual practice and teaching of the discipline itself.

In the post-modern context, history students are taught to question and criticise. Bertram (2008b, p. 256), drawing from Husbands, Pendry and Kitson (2003), identifies this approach to the teaching of history as ‘alternate’ which she contrasts with the ‘older’ or ‘great tradition’. The ‘great tradition’ involved history being seen as a narrative where facts were chronologically presented and history was ‘what happened’. While the traditional approach emphasized the ‘knowing’ of history, the ‘alternate tradition’ concerned the ‘doing’ of history. In Britain, the 1970’s constructivist model of history presented the discipline as inclusive of a variety of groups of people in world history, centring on historical skills. Learners were taught to embrace historical ways of thinking; sources had to be used in specialised ways so as to develop learner skills of inquiry and critical thinking (Bertram, 2008b). Within this approach, relevant, topical and even controversial issues could be used as historical content by the teacher to initiate debate and foster critical thinking. In my opinion, the ‘new’ definition of history as a “reconstruction of past events, through a dialogue between surviving evidence about the past and existing analytical, theoretical and political concerns in the present” (Mallon in Leinhardt, Beck, & Stainton, 1994) best represents the reconceptualisation of history and the new route that history teaching has taken (Bharath, 2009).

Many problems associated with the teaching of history have been attributed to the misconceptions of its true nature. Before 1960, when history was traditionally viewed as a subject that prioritised facts, both the United Kingdom and South Africa followed the chronological approach to the teaching of history. Facts were highlighted by prominent historians and were recorded in print. The shift occurred from the content-based approach to a methodology which reveres skills, concepts and attitude formation. “It has been asserted by critics of the skills-based approach that at primary school level, pupils learn more about history if a chronological approach is adopted” (Mathews et al., 1992, p. 20). It is, however, doubtful whether chronology as a concept is developed by studying historical periods in chronological order. Lévesque (2008, p. 78) argues that without a strong sense of chronology of when events took place and in what order, it is impossible for students to explain historical causality.

The structure of the discipline of history or the nature of historical knowledge is said to be composed of two intertwined strands, which are the process and content dimensions (Dean, 2004). Dean (2004) cites Schwab’s distinction of ‘substantive’ and ‘procedural’ history; ‘procedural’ being the ‘know how’, the methodology of historians, which are the procedures for conducting historical investigations; and ‘substantive’ being the ‘know that’, statements of fact or concepts of history constructed by historians in their investigations. Bertram (2008c) contends that learners have to acquire both substantive and procedural knowledge, as they represent fundamental and interlinked aspects of history, in order to be appropriately inducted into the discipline of history. In his study, Martin (2012, p. 8) distinguishes between **procedural and substantive concepts**, dismantling the latter into two identifiable typologies. I have merged his ideas and tabularised these in Table 2.1.

Table 2.1 Substantive and procedural concepts (condensed from Martin, 2012, p. 8)

Substantive concepts	Procedural concepts
<p>Substantive concepts refer to subject matter and content knowledge of history i.e. key terms, names, events etc.</p> <ul style="list-style-type: none"> - They help identify, locate and organise historical substantive content, making the historical phenomena meaningful and intelligible. - Historically substantive concepts focus on the content knowledge of history: the significant historical phenomena, its protagonists and themes. - They can be categorised as unique, organisational or thematic or inclusive concepts. 	<p>Procedural concepts are specific methods and procedures that give disciplinary structure.</p> <ul style="list-style-type: none"> - They allow students to construct historical knowledge by employing ‘historical thinking’ concepts in communicating historical understanding of history as a discipline or form of knowledge. - They are specific methods used by historians to investigate and describe historical processes and periods. - They are relational to the substantive as they explain ideas and active conceptual tools that provide understanding required in the ‘doing’ of historical inquiry that enables historical construction. - These are meta-concepts which can be used to analyse historical significance, evidence, cause and consequence, continuity and change, historical perspectives. - These procedural concepts enable students to move beyond lower order thinking of ‘identify and describe’ to engaging learners in higher order thinking skills such as ‘analyse, synthesize, evaluate and create’ knowledge. - These concepts are foundational to historical thinking and reasoning.

Martin (2012) then teases out the substantive dimension into three different types, namely, Unique Concepts, Organisational Concepts and Thematic Concepts which together constitute the shape of the substantive knowledge in history. I have tabularised these distinctions in Table 2.2 to show the conceptual mapping of these Substantive Concepts (Martin, 2012).

Table 2.2 Conceptual mapping of Substantive Concepts (Martin, 2012)

Unique Concepts	Organisational Concepts	Thematic or Inclusive Concepts
<p>The unique concepts applied singularly to specific people, places and events and apply to one specific historical phenomenon, e.g. Adolf Hitler, Nazi, Battle of Waterloo, World War 1.</p> <p>- These are terms that derive from specific contexts and provide the ‘building blocks’ that students utilise in a specific historical inquiry to identify, describe, explain and illustrate understanding.</p>	<p>The organisational concepts group a series of historical phenomena into periods that have intrinsic relationships and their grouping elaborates their historical meaning.</p> <p>- Organisational concepts describe and group these connected and coherent historical phenomena under a shared concept. For example, the Industrial Revolution or Renaissance or Cold War are organisational concepts which tell us something about the context of the past and how historians have thought and written about them over time.</p> <p>- These concepts are determined by conditions: they must be grounded in evidence and not arbitrarily chosen and must illuminate the facts.</p>	<p>The thematic or inclusive concepts span and transcend different periods and time which can collect ideas that can be applied in multiple historical contexts, e.g. revolution, war, depression, freedom and rights, monarch, communism etc.</p> <p>- These concepts are not context bound like unique and organisational concepts.</p> <p>- Students utilise these concepts in a range of historical inquiries that require application of analytic and evaluative heuristics, for example, student understanding of the word ‘slavery’ requires an understanding of procedural concepts of continuity and change. Slavery from early civilisation to 19th century U.S.A draws upon changing chronological, spatial and social frames that have influenced our understanding of this term.</p>

The meta-concepts described by Martin (2012) in the Procedural concepts column of Table 2.1 bears a strong resemblance to the procedural benchmarks presented by Seixas (2006) below. Seixas (2006) declined to define historical thinking, rather seeing it as a process of ‘progression’ and unpacking the term historical thinking with six structural and procedural benchmarks (Martin, 2012. p. 20):

- **Establish historical significance:** This requires students to establish what is historically significant based on two criteria: events that have resulted in change and those that are revealing about enduring or emerging issues in history and contemporary life.
- **Use primary source evidence:** This requires students to construct knowledge about the past by finding, selecting, interpreting, and contextualising primary sources, not only in terms of information, but sources must also be read to determine their authorship, purpose, context and reliability to construct an original account of an historical event.
- **Identify continuity and change:** This provides the means to organise the complexity of historical phenomena by identifying and explaining the processes and rate of historical change and make judgements about continuity.
- **Analyse cause and consequence:** This requires analysis of the agency that individuals and groups have in promoting, shaping and resisting change over long and short periods of time and multiple influences that create change, and their intended consequences.
- **Take historical perspectives:** This entails understanding the different political, social, economic and cultural contexts that shaped people’s lives and their actions, but without students’ imposition of presentism on historical phenomena.

- **Understand the moral dimension of historical interpretation:** This provides the opportunity to learn from the past and provides insight into moral issues that affect implicitly and explicitly the present by attempting to understand perspectives and contexts of historical agents.

Thus, both the substantive and procedural knowledge are fundamental in the understanding of the nature of historical knowledge. It stands to reason that any attempt to gauge progression in historical thinking would mean analysing and interrogating both types of knowledge.

2.3.2 Describing the key changes in school history

In the early 1990s British education saw a drastic change from Memory-History to Disciplinary-History and, thus, influenced scholars to focus on historical thinking. This movement was fuelled by a highly influential history project established in the 1970s, the Schools' Council History Project (SHP). It was based on studies of students' understanding of causation, change, evidence and empathy. The SHP examined the important role of these concepts in students' progression in learning and practising the discipline. To reach the desired level of 'sophisticated historical thinking', the key elements in the structure of historical enquiry (significance, epistemology and evidence, continuity and change, progress and decline, empathy and moral judgement and historical agency) must be understood (Lévesque, 2008, p. 32).

In England, the key concepts of the National Curriculum for history are time, chronology, evidence, importance, causation, change and continuity, empathy, interpretation and enquiry (Lévesque, 2008). Although the United States does *not* have the exact notion of procedural concepts for its history curriculum, the National Standards for history do provide a list of five related historical-thinking skills as arising in the actual practice of the discipline. These are chronological thinking, historical comprehension, historical analysis and interpretation, historical research capability, historical-issue analysis and decision making. Within the United States' National Standards, Barton and Levstik claim that students learning history are expected to identify, analyse, respond morally and exhibit/display (Lévesque, 2008, p. 34). Other scholars in Australia, France and Germany have followed England and the United States by developing history programmes along similar lines.

2.3.3 The aims of history education

Traditionally the focus of history education has been on content and learning history by the memorisation of facts. Presently, the learning process is configured to include reasoning, as learners interact with various facts and stories about the past. An extensive review of empirical literature on student thinking and reasoning about history, conducted by Van Drie and Von Boxtel (2008, p. 88), yields an extended definition about the relationship between historical reasoning, historical literacy and historical consciousness. They argue that “Although it is now generally agreed that learning history implies more than learning facts about the past, different terms are used to describe the aim of history education, for instance, historical literacy (e.g. Lee, 2004, 2007; Perfetti et al., 1995; Roderigo, 1994), historical thinking (e.g. Husbands, 1996; Schreiber et al., 2006; Seixas, 1993; Spoehr and Spoehr, 1994; VanSledright & Frankes, 2000; Wineburg, 2001), historical consciousness (e.g. Goegebeur et al., 1999; Jeismann, 1997; Von Borries, 1997), and historical reasoning (e.g. Kuhri et al., 1994; Leinhardt et al. 1994)”. Some authors relate historical thinking and reasoning to historical consciousness or literacy. Perfetti et al. (1995), for example, state that historical literacy involves learning historical events (a story) combined with the use of articulate reasoning (*ibid*).

2.3.4 The shape of the history curriculum and its textbooks in the years of apartheid

During the late 1950s, up to the early 1980s and 1990s, pedagogy and textbooks in South Africa reflected principles of the Christian National Education. Dean, Hartmann and Katzen (1983) purport that earlier interpretations of history presented South African history from a White point of view. They argue that “until fairly recently, a historical paradigm, which makes the assumption that [the] history of South Africa began with White settlement, held undisputed sway” (p. 17). In the nineteenth century and early twentieth century, history was presented from a British point of view and other White groups, like the Afrikaners were downplayed.

The end of the nineteenth century saw the rise of political Afrikaner consciousness. Afrikaner interpretation of history stressed the role of Afrikaner heroes and events such as the Great Trek and the Anglo-Boer War. Ndlovu (1993, p. 18–19) argued that the content and form of assessment was dominated by apartheid ideology and that

even producers of textbooks were dominated by Afrikaner Nationalist supporters, producing books that supported this ideology. According to Chisholm (2008), textbooks played a critical role in legitimating and promoting apartheid. Textbooks were prescribed for schools and they were not allowed to choose their books, but had to indicate the number of books required. This prevented other textbooks from being utilised as prescribed books in schools, including those that represented alternate methodologies. Essentially, the curriculum during the apartheid years reflected history as a compulsory school subject from standards 2–7 (now called Grades 4–9). It was an optional subject from standards 8–10 (now called Grades 10–12). The content was divided between general and South African history. The general history was Eurocentric and contained very little history on Africa. Content comprised facts that had to be memorised and reproduced for testing purposes. The focus here was on substantive concepts (content) and not procedural concepts (skills) (Bharath, 2009).

The shift towards a skills-based approach to the teaching of history in South Africa was influenced by a progressive movement in Britain in 1974. Identified as the Schools' Council Project, this movement aimed to reconsider the nature and relevance of history, effectively replacing the chronological and factual approach to the teaching of history with a skills-based one. This movement away from the sterile content-based approach to a skills-based methodology in the 1970s officially reached the South African curriculum after democracy was achieved in 1994. The 'new' trends did not reach all South African schools immediately. Bertram (2008b, p. 157) contends that the 'alternative' approach to history was "adopted in South Africa in some independent schools and some House of Assembly and House of Delegates schools in the early 1980s, particularly in the Transvaal, Natal and Cape". Morrel (1990) argues that a new series of textbooks called *History Alive*, written in 1987, included more source-based activities than other content-heavy books did at that time. These were the revisionist, progressive authors and publishers in South Africa who were already using content and skills to develop the learner. This is an indication that some South African authors were already conforming to global trends in history teaching. The textbooks were not used by all schools and did not receive enough publicity or attention with regard to the pace that they were already setting in the field of history (Bharath, 2009).

An understanding of the significant ‘old’ history curriculum of the apartheid era is vital, as it provides reasons why so many textbook research studies emanating from the last few years have resulted in coverage of issues such as bias, gender, class, gender-stereotypes, apartheid, Eurocentricity and Africanisation (Twala, 2003; Schoeman, 2009; Morgan & Henning, 2011). It also creates a platform for comparison with present history curriculum structures. The comparison is not the only object of research, but in the content of the new history, we can view what history and whose history we are currently studying, based on selections of curriculum planners and designers.

2.3.5 The new direction of the history curriculum in South Africa

In South Africa, the impact of educational and curriculum changes has resulted in the alteration of the shape and features of the discipline of history. In line with policy, curriculum content was revised, racial and incorrect content were removed and textbooks were also revised to embrace the transition to a skills-based framework (Beets & le Grange, 2008, p. 69). The ‘new’ history encouraged students to consider the nature of historical evidence and then construct narratives from various forms of evidence. History then becomes a continual process of argument, where there are no answers, but good coherent arguments (Wilson, 1999). In order to develop historical understanding, learners need knowledge of ‘how’ historical accounts are constructed.

2.3.5.1 General educational changes in South Africa

Before 1990, South African curriculum policy was characterised as “racist, Eurocentric, sexist, authoritarian, prescriptive and discriminatory” (Jansen, 1999b). Since April 1994, the national Department of Education has introduced a number of educational policies that aim at transforming education in South Africa (Hoadley & Jansen, 2002). In 1997 the outcomes-based education, called Curriculum 2005 (shortened to C2005), was introduced to overcome the curricular divisions of the past by foregrounding outcomes and allowing teachers to select their own content. Implementation was very variable, and prompted a curriculum review in 2000. This led to the first curriculum revision: the *Revised National Curriculum Statement Grades R–9* and the *National Curriculum Statement Grades 10–12* (2002). This curriculum provided more structure and proposed content for teachers.

Ongoing implementation challenges resulted in another review in 2009 and the *Revised National Curriculum Statement Grades R–9* (2002) and the *National Curriculum Statement Grades 10–12* were revised to produce the CAPS⁷ document. Since 2012, the two National Curriculum Statements for Grades R–9 and Grades 10–12 respectively have been combined in a single document and are simply known as the *National Curriculum Statement Grades R–12*. Motsheka purports in the CAPS document (2011), that the *National Curriculum Statement for Grades R–12* not only builds on the previous curriculum, but also updates it and aims to provide clearer specification of what is to be taught and learnt on a term by term basis: “*The National Curriculum Statement Grades R–12* represents a policy statement for learning and teaching in South African schools and comprises of the following:

- Curriculum and Assessment Policy Statements (CAPS) for all approved subjects listed in this document.
- National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R–12; and
- National Protocol for Assessment Grades R–12.” (CAPS, Foreword, 2011)

2.3.5.2 *General aims of the South African curriculum*

According to the CAPS document, *The National Curriculum Statement Grades R–12* (2011) is based on the following principles, amongst others

- Social transformation: ensuring that the educational imbalances of the past are redressed, and that equal opportunities are provided for all sections of the population.
- Active and critical learning: encouraging an active and critical approach to learning, rather than rote and uncritical learning of given truths.
- High knowledge and high skills: the minimum standards of knowledge and skills to be achieved at each grade are specified and high, achievable standards in all subjects are set.
- Progression: showing content and context progression of each grade from simple to complex.

⁷ CAPS refers to the Curriculum and Assessment Policy Statement (Grades R–12) which is the common name for the current curriculum in South Africa.

2.3.5.3 The subject of social science in South Africa

The new shape of history, as it is taught alongside geography in the subject of social sciences, can be understood against the background of general educational and curriculum policy changes. The general changes were presented briefly in Chapter One, showing that with each change history also altered. The following table summarises these changes in the General Education and Training Band (GET), so that the present shape of history can be understood. The GET band includes the Foundation, Intermediate and Senior Phases in the South African school curriculum. In the Further Education and Training Band (FET), where history is not compulsory, history is only studied if learners make the choice to pursue it.

Table 2.3 Summary of changes to history and its textbooks in the General Education and Training Band (GET)

Year and Policy	Effect on History	Effect on Textbooks
Before 1994:		
Policy of Christian National Education (CNE)	<ul style="list-style-type: none"> - History as a separate subject in the apartheid curriculum. - History dominated by Afrikaner Nationalism and Eurocentrism. 	- Textbooks focus on facts about Afrikaner heroes, promoting racist and sexist content as well as apartheid.
After 1994:		
Paradigm shift to Outcomes-based framework: C2005 (Grade R-9) in 1997	<ul style="list-style-type: none"> - Political imperatives resulted in history curriculum reform. - Traces of apartheid, racism and sexism removed. - Subjects unified into learning areas. - History removed as core subject and integrated with geography as human and social science (HSS). - Both history and geography had a single set of nine outcomes. 	<ul style="list-style-type: none"> - Textbooks in history devalued. - Integrated curriculum moved away from subject specifics.
Revised National Curriculum Statement (RNCS) (2002) (Grade R–9)	- History and geography remain interlinked in the new social sciences (SS) learning area but each with their own outcomes and knowledge focus.	<ul style="list-style-type: none"> - History textbooks are rewritten alongside geography as social sciences. - Learning outcomes replaced by Assessment Standards.
National Curriculum Statement (NCS), Curriculum and Policy Assessment Statement (CAPS) social sciences (Department of Basic Education, 2011) Intermediate Phase (Grades 4–6) and Senior Phase (Grades 7–9)	<ul style="list-style-type: none"> - History and geography are parallel disciplines taught in the subject of social sciences. - The disciplines are kept separate in the same policy document. - Specific Time Allocations for each discipline with different aims, skills, content and concepts for history and geography presented separately. 	- History and geography are two separate disciplines, but represented in the same textbook.

The CAPS curriculum stipulates increased time on the timetable for social sciences. Both disciplines are taught separately and shown separately on the learner’s report. The social sciences CAPS document (DoE, 2011b, p. 8) emphasises writing as a skill and states that, “Learners should write regularly, with a clear progression in length and complexity through the grades. The CAPS language documents specify levels of requirement for writing and should be consulted throughout”.

The CAPS social science document (DoE, 2011b, p. 8) also stipulates that, “Every learner should have a quality textbook”, and that they “should provide accurate content that is aimed at the development of the appropriate skill, concepts and values. Textbooks must include appropriate and adequate assessment activities.” The form of history in the new curriculum, namely the National Curriculum Statement (NCS), is said to allow for a multiplicity of voices and opinions to be included (Department of Education, 2002). Study of indigenous languages, as per curriculum document, should foster a more inclusive and balanced history. The new curriculum also aims to achieve the objectives of the Constitution, which include democratic values, social justice and human rights. Revised history brings with it investigative procedures which allow the interpretation of the past from the study of things or artefacts, material evidence, written evidence or oral records (Mathews et al., 1992). New methodological approaches focus on the analysis of sources and evidence and invoke new blends of skills like extrapolation, judgement, comparison, empathy and synthesis rather than old methods of rote learning of facts (Seetal, 2005). Learners are expected to interact critically with information from a range of sources, including those presenting different views of the same event. The new approach involves ‘what’ learners learn and ‘how’ they learn and construct knowledge. These principles are articulated in the newer CAPS curriculum.

2.3.5.4 The specific aims of CAPS history

According to the CAPS (DoE, 2011b p. 9), history is the study of change and development in society over time. It enables people to understand and evaluate how past human action has an impact on the present and how it influences the future. It is a process of enquiry, and this rigorous process enables learners to achieve the aims and demonstrate the skills, as they are represented in Table 2.4 below.

Table 2.4 Specific aims and skill of history (CAPS: Intermediate and Senior Phases, p. 9)

The specific aims of history	Examples of the skills involved
1. Finding a variety of kinds of information about the past.	Being able to bring together information, for example, from text, visual material (including pictures, cartoons, television and film), songs, poems and interviews with people; using more than one kind of written information (books, magazines, newspapers, websites).
2. Selecting the relevant information.	Being able to decide what is important information to use. This might be choosing information for a particular history topic, or, more specifically, to answer a question that is asked. Some information that is found will not be relevant to the question, and some information, although relevant, will not be as important or as useful as other information.
3. Deciding about whether information can be trusted.	Being able to investigate where the information came from: who wrote or created the information and why did they do it? It also involves checking to see if the information is accurate, comparing where the information came from with other information. Much information represents one point of view only.
4. Seeing something that happened in the past from more than one point of view.	Being able to contrast what information would be like if it was seen or used from another point of view. It also requires being able to compare two or more different points of view about the same person or event.
5. Explaining why events in the past are often interpreted differently.	Being able to see how historians, textbook writers, journalists, or producers and others come to differing conclusions, and being able to give reason(s) why this is so in a particular topic of history.
6. Debating about what happened in the past on the basis of the available evidence.	Being able to take part in discussions and debates and develop points of view about aspects of history, based on the evidence that comes from the information available.
7. Writing history in an organised way, with a logical line of argument.	Being able to write a piece of history which has an introduction, set out the relevant information in a logical way and in chronological order, and come to a conclusion that answers the question asked in a coherent way.
8. Understanding the importance of heritage and conservation.	Being able to explain how and why people and events are publicly remembered in a community, town or city, province and country. It also involves investigating how people and events in the past are commemorated in ceremonies, museums and monuments.

2.3.5.5 Concepts in history

According to the CAPS document (DoE, 2011c, p. 11) the concepts in history are

Historical sources and evidence: History is not ‘the past’ itself. It is the interpretation and explanation of information from various sources. Evidence is created when sources are used to answer questions about the past.

Multi-perspective approach: There are many ways of looking at the same thing in the past. Looking into the past can involve

- the different points of view of people in the past according to their position in society,
- the different ways in which historians have written about them, and
- the different ways in which people today see the actions and behaviour of people in the past.

Cause and effect: The reasons for the events and the results of these events. The consequences of events drive future events and help explain human behaviour.

Change and continuity: Over a period of time it is possible to contrast what has changed and what has remained the same. Closely related contrasts that are used to teach history are similarity and difference and then and now, which help to make sense of the past and the present.

Time and chronology: History is studied and written in sequence. It is important to be able to place events in the order in which they happened in time, and to consider their content. Timelines are often used to develop the concept.

The appearance of these concepts in a South African history curriculum document confirm how South Africa conforms to international trends, as described by Seixas (2006) and Martin (2012) earlier.

2.3.5.6 Learning history through language in the textbook

According to Kissack (1997, p. 215), “Knowledge is inextricable from the medium of language in which it is presented”. Most social sciences textbooks present history knowledge in English. Educational policy allows for English to be studied as a home language or first additional language. The CAPS social science policy documents refers the teachers of social science to the language policy for guidelines on writing in history. The CAPS curriculum Home Languages Policy (DoE, 2011a) indicates that language is a tool for thought and communication. It advances that well developed ‘Reading and Viewing’ skills (p. 10), are central to successful learning across the curriculum. This would extend to the social sciences. Learners develop proficiency in reading and viewing a wide range of literary and non-literary texts, including visual

texts. Learners are taught to recognise how genre and register reflect the purpose, audience and context of texts. This concept of ‘register’ is common to SFL (Systematic Functional Linguistics), but would be foreign to educators in the classroom unless they have studied language at a tertiary level. The CAPS home languages document (DoE, 2011a, p. 10) states: “We know from research that children’s vocabulary development is heavily dependent on the amount of reading they do”. It further elucidates that “Writing is a powerful instrument of communication that allows learners to construct and communicate thoughts and ideas coherently” (p. 11), and that “Writing which is appropriately scaffolded using writing frames produces competent, versatile writers who will be able to use their skills to develop and present appropriate written, visual and multi-media texts for a variety of purposes”. The idea of writing for purpose is linked with the SFL approach to genre-based writing. The CAPS home languages document (DoE, 2011a, p. 12) states that, “Learners will learn how ‘Language Structures and Conventions’ are used, and will develop a shared language for talking about language (meta-language), so that they can evaluate their own and other texts critically in terms of meaning effectiveness and accuracy.” These learnt skills apply ‘across the curriculum’, to be used in history classrooms where learners engage with different source materials.

This text-based approach to language enables learners to become competent, critical and confident readers, writers, viewers and designers of texts, and so become proficient in analysing and evaluating texts. When these texts become evidence, it becomes the evidential methodology used by the historian. Further discussion around this aspect will be advanced later in the section that follows on the development potential of the textbook in the ‘Structural concepts and elements at work in textbooks’ section.

When history students are required to write texts such as essays, they are expected to follow the home language policy requirements (DoE, 2011a, p. 32), which presents a tabular summary of the number of words learners are expected to produce in each grade and shows a clear progression in the amount. For example, a Grade 4 learner would have to produce 100–120 words (2–3 paragraphs) for an essay, while a Grade 5 learner would produce 120–140 words (3–5 paragraphs) and a Grade 6 learner would produce 140–150 words (4–6 paragraphs). Likewise, different types of texts, recounts,

retelling, essays, stories, transactional texts, interviews, information texts, instructions, directions, comprehension texts, are all graded by length.

2.4 Structural concepts and elements at work in textbooks

2.4.1 What is progression or development in historical thinking?

Van Eeden (2008, p. 109) states that “Progress in education implies moving forward generally as a benefit and not to the detriment of ... To determine if there is progress, I can imagine that the experts in a discipline such as History should define criteria that reflect progress and then measure current developments and products according to this criteria. If this activity is neglected, one tends to invent the existing wheel all the time instead of refining its movement or use.”

Lee and Shemilt (2003) distinguish between ‘progress’ and ‘progression’. They assert that pupils can make progress in any area of history, keeping better notes, writing better essays, but what counts as ‘better’ will differ across different activities. ‘Progress’ could mean the amount of information a learner can remember. The greater number of correct ticks on a paper could mean ‘better’. Learning in history is not just ‘learning one damn thing after another’. Research has suggested that children’s ideas about history and the past change as they grow older and that it is possible to view these changes in terms of *development*. Moving systematically from information on one period to the next is not enough to count as ‘progression’. Lee and Shemilt (2003) advocate that ‘progression’ is to focus on the way in which pupils’ ideas about history and the past develop, that is ‘historical thinking’.

According to Lee and Shemilt (2003), the early Piagetian approach emphasised formal characteristics of historical reasoning which concentrated on substantive concepts that historians employ when dealing with the past, like ‘peasant’, ‘queen’ and ‘parliament.’ These ideas are in contrast with ideas that shape history, like ‘evidence’, ‘historical account’, ‘empathy’ and ‘change’. The reference to ‘historical account’, ‘empathy’ and ‘evidence’ bears a strong resemblance to the second-order or procedural concepts of history. Together with the substantive knowledge or first-order concepts, these second-order concepts construct historical knowledge. Work on pupils’ second-order ideas began to provide evidence that it is possible to treat history

as progressive in a somewhat analogous way to physics: in both subjects, pupils do not simply add to their information, but acquire patterned and powerful understandings that change the ways they learn. In physics, it is necessary to acquire some basic concepts first before more complex understandings can be built upon these. Likewise, there is development of understanding within history, and there also exists some basic knowledge and terminology before more complex understandings of history are taught. The concept of progression, thus, begin to mean something more specific than 'progress', but mean the acquisition of more powerful ideas. In mapping the 'ideas' students are likely to hold about history as a discipline, a progression model is uncovering students' prior conceptions. An understanding of these conceptions is essential for teaching, as it is there to correct misconceptions or build on students' ideas (Lee & Shemilt, 2003). According to Lee and Ashby (2000, p. 200), "Once learning history is thought of as coming to grips with a discipline, with its own procedures and standards for evaluating claims, it becomes easier to envisage progression in history rather than just an aggregation of factual knowledge, whether the latter is constructed as deepening or expanding." The implication is that the student acquires more powerful understanding of the nature of the discipline as well as knowledge of the past itself. Hence, Lee and Ashby (*ibid*) argue that the acquisition of more powerful procedural or second-order ideas is perhaps the best way of giving sense to the notion of progression in history.

Lee and Shemilt (2003) highlight 'progression models' which need to be constructed separately for key concepts like 'change', 'evidence', 'accounts', 'cause' and 'empathy', and argue that conceptual crudity in the form of generic and imprecise language, like 'simple', 'begin to' and 'show some independence', be avoided as a substitute for identification of important shifts in understanding. They also assert that research evidence points to the fact that students' ideas are 'decoupled', that, for example, a student's ideas about 'evidence' can remain the same while his ideas about 'accounts' change quite rapidly. They also caution about quantifying the gaps between categories, and in assuming that the gaps in one concept are equivalent to those in another. However, they also argue that these models are hierarchical, as students work from less to more powerful ideas. The levels in the models of progression, however, are not a sequence of ladder-like steps that every student must climb. The models can be said to be both hierarchical and, at the same time, not a

ladder-like sequence. This apparent contradiction can be explained by the movement of ideas within each key concept at various degrees. It is almost certain that each key concept advances as learners' ideas about each one gains stronger understanding as they mature. However, it is not guaranteed that they advance in the same amounts or degrees at the same time in the curriculum. This means that while the growth in ideas is expected, it is not a calculated, measurable quantification at any particular stage. It is, for this reason, why Lee and Shemilt (2003) recommend different models of progression for each key concept, so that the movement of students' ideas from less powerful to more powerful, within each key concept, like 'evidence' and 'change', is represented separately. The second-order concepts in such models possibly set out ideas that groups of children of certain ages can exhibit, showing patterns of development. A progression model can also help predict the range of ideas that are likely to be encountered at a certain developmental stage. Research has shown that in history (as in science), there is a seven-year gap. The ideas seven-year-olds have about 'cause', for example, may be the same for most fourteen-year-olds, and some fourteen-year-olds will be working with the same ideas that seven-year-olds employ (Lee & Shemilt, 2003).

The models work on the basis of prediction, as they show us how most students of a given age are likely to think. They do not tell us what students must necessarily *do*. There is no guarantee of a model's shelf-life or its reconfiguration over time. It is not comprehensive or utilitarian. Whilst research about progression outside the United Kingdom (UK) is still scarce, it looks as if the models developed in the UK can successfully predict the range of ideas with which students operate, even if the age distribution in other cultures is different (Lee & Shemilt, 2003). Whilst these models are not rigid, all-embracing models of progression, they have built up empirical data over the years and offer ways to analyse pupil progression (Lee & Shemilt, 2004). Lee & Shemilt (2004) present a research-based progression model that suggests that students' preconceptions about history, or what they understand initially is important to how and what they are going to learn. Lee & Shemilt (2009, p. 43) later offer a six levelled model of second-order concepts which deal with students' conceptual understandings. They argue that conceptual apparatus must be mastered at common-sense or first level before a student can write explanatory narratives (*ibid.*). This is related to work on genre which requires certain linguistic structures of one set of

connectives before another. For example, the usage of ‘because’, ‘and then’, ‘so’ and ‘next’ is important as it alludes to the cause-and-effect second-order advancement. This model advances how conceptual thresholds must be crossed at each level to ensure that appropriate history is taught or presented to learners at different points.

Lee & Ashby (2000, cited in Maggioni, Alexander & VanSledright, 2004) found that students developed at different times in conceptual areas, showing understanding of historical evidence while failing to show any progression in dealing with causality. Individual variability seemed greater than a ‘stage-like’ pathway (p. 176). Similarly, in the United States, a study by Bruce VanSledright (2002) with fifth graders drew attention to the role of instructing learners in the heuristics of historical investigation. The focus is shifted to the value of teaching learners the tools of historical inquiry, with guidance and scaffolded instruction (cited in Maggioni et al., 2004). Maggioni et al. (2004) place teachers at the core of developing historical thinking as they too have to be familiar with the tenets of the discipline in order to teach it. They argue that ‘no curricula can substitute the daily, living relationships between students and their teacher, especially when the target is some form of higher level thinking (p. 191).

A further research-based model is advanced by Blow (2011) to understand how students make sense of concepts of change, continuity and development. The model has six levels, advancing the conceptual understanding of these three broad second-order concepts. Blow (2011) contends that children’s mastery of these second-order concepts is fundamental to their meaning making of stories in history. Understanding of these concepts help them make sense of the past and its relationship to the present. Later work by Blow, Lee & Shemilt (2012) advance that students experience difficulty not only in chronological conventions but that conceptual mastery was also problematic. They argue that learning to think historically involves learning to think about concepts like time, duration, sequence and concurrence as well as the relationships between them. This would allow learners to gain understanding of both historical and present contexts.

Alternative models of progression can be derived from the now considerable body of constructivist research conducted in the UK. In Canada, the Historica Foundation and the Centre for the Study of Historical Consciousness are collaborating with educators

to help teach and assess historical thinking. Lévesque (2008, p. 7) cites Veronica Boix-Mansilla and Howard Gardner's definition, that "Disciplinary thinking constitutes the most advanced way of approaching and investigating issues within various domains of knowledge". Lévesque (2008) contends that disciplines such as history have their own modes of enquiry, networks of concepts and principles, theoretical frameworks, symbolic systems and vocabularies, offering formidable 'ways of knowing' about the past or current issues of significance. He further highlights the powerful ideas of Seixas, Wineburg, VanSledright, Nora, Shemilt and other prominent scholars in the field of historical thinking. Lévesque (2008) argues that while children seem to easily acquire theories and explanatory frameworks supplied by Memory-History, disciplinary-thinking proves to be more challenging. People need to acquire established knowledge within their disciplines (e.g. facts and accounts), but this must be acquired through disciplinary method procedures. Cognitive psychologist Sam Wineburg (2001) asserts that achieving mature historical thinking is 'far from a natural act'. Dewey (cited in Lévesque, 2008, p. 27) summed it up by concluding that "the value of knowledge is sub-ordinate to its use in thinking".

Nora (cited in Lévesque, 2008, p. 8) describes 'Disciplinary-History' which can provide students with the necessary tools and concepts to engage in critical reconstruction. Nora distinguishes between 'memory', which he identifies as 'concrete and practical', and history, which dwells on temporal continuities, their relationship requiring critical discourse. According to Lévesque (2008, p. 14), the disciplinary notion of historical thinking was evidenced as early as 1899, when the report of the American Historical Association on history in schools, highlighted that it was "not an accumulation of information but the habit of correct thinking". In recent years in North America, Europe and Asia-Pacific (especially Australia), an interest has grown in teaching students about ideas and procedures needed to engage in the study of history. Historical thinking is therefore a widespread phenomenon.

In their influential book, *Understanding by Design*, educators Grant Wiggins and Jay McTighe claim that 'essential' questions are doorways for sophisticated thinking because they help educators focus on *what is worth* knowing by employing a problem-solving approach to the subject (as cited by Lévesque, 2008). 'Essential' questions go to the heart of the discipline, helping to orientate and structure

arguments. This is true for any research study which is preceded by critical questions the study plans to answer. Lévesque (2008) poses pertinent questions, as listed below, to direct his investigation, and I use them to direct my own critical questions of research. Not only will these questions help with the evaluation of ‘progression’ or the development of historical thinking in current history textbooks, but they can guide the analysis by forming part of the analytic tool:

- Is school history a practice of Memory-History, meant to introduce children to their cultural and natural heritage?
- Is school history about critical inquiry about the collective past?
- If it is ‘critical inquiry’, what are the concepts and knowledge of the past that students should learn in order to think historically?
- What abilities do they need to practise history?

Lévesque (2008, p. 27) argues that school history has typically failed to promote historical thinking because of its persisting and often dogmatic focus on transmission of Memory-History, largely in the form of master narratives. He purports that children cannot think historically if they have no idea of the structuring concepts of the discipline. While Lee provides the useful distinction between substantive (first-order) and procedural (second-order) knowledge of history, Lévesque contends that both the substantive (content) and procedural concepts (like ‘evidence’ and ‘empathy’) give shape to historical practice and thinking about the past. Lévesque (2008, p. 17) uses the following procedural or structural concepts, not necessarily in sequence, to describe the shape of historical thinking, and by using the idea of ‘essential’ questions, provides a doorway to uncover the answers to these questions:

- **Historical significance:** What is important in history?
- **Continuity and change:** What changed and what remained the same?
- **Progress and decline:** Did things change for better or worse?
- **Evidence:** How do we make sense of the raw materials of the past?
- **Historical empathy:** How can we understand predecessors who had different moral frameworks?

The parallels and intersections in the ideas of Seixas (2006) and Martin (2012) are demonstrated in Lévesque's concepts above. Lévesque (2008) clears the misconception about 'progression' being a movement on a linear scale of reasoning from substantive (lower-order thinking) to procedural knowledge (higher-order thinking). He argues that 'progression' in historical thinking should be simultaneous *within each* domain of knowledge and not from one to another. He maintains that sophisticated historical thinkers are not those who have successfully moved from content acquisition to mastery of procedural knowledge, but those who have made significant progress in understanding *both* the substance of the past and the ideas (procedures and concepts) necessary to make sense of it. It is paramount to mention here that the present study is driven to understand how the range of textbooks chosen for analysis represents the progress in these two domains of knowledge.

Ford (2014) suggests a model of progression in the United Kingdom which moves away from a linear way of thinking about it and uses an approach of nonlinear conceptual mastery, again focusing on the second-order concepts of causation, continuity and change, taking a historical perspective, cause and consequence and developing a moral outlook (p. 1). These ideas are similar to Lee and Shemilt's (2003), where learners gain powerful ideas and mastery over the concepts as they advance through the grades. There is no precise order in which this can take place. The lack of clarity regarding the sequence of gaining mastery over these concepts is argued as presenting a problem in history education (Lévesque, 2008). History educators may fail to understand where to begin with historical thinking. They may introduce learners to disciplinary concepts and procedures, thereby creating the possibility for progression in historical thinking, but it is not known at which point in the history curriculum these second-order concepts should be introduced and taught.

Scholars themselves disagree about when learners of history should be engaging with disciplinary practices. VanSledright (2004) contends that learners in school are 'novices' to the standards of disciplinary experts (Lévesque, 2008) and do not have to function as experts do. Conversely, Bruner asserts that disciplinary practices in history are the same, irrespective of level or age. He argues that the structure of a discipline can be taught effectively at any stage of development, claiming that "Intellectual activity anywhere is the same whether at the frontier of knowledge or in a third grade

classroom” (Lévesque 2008, p. 11). Consequently Chapman (2010) reports that developing student’s historical thinking is about challenging them in two ways. Firstly, it is about challenging students to “*think about how* historical knowledge claims are constructed” and secondly it is about challenging students to “think of historians as *actively engaged in constructing knowledge claims* about the past *through argument*” (p.21-22).

2.4.2 The history textbook as an instrument of learning

According to Hummel (1988) the content of a text should represent the curriculum. He argues that, as the messenger of the curriculum, the textbook is seen as delivering alternate messages. By this he alludes to the fact that textbook content may contain information which runs contrary to the expectations of a curriculum. For instance, the purpose of any history curriculum is to provide learners with ‘accurate’ content about the past, or present evidence to them about past events in an objective manner. Yet, the content of South African history prior to democracy was seen as inaccurate, racist, sexist, stereotypical and Eurocentric and has been overhauled and replaced with one that is said to be inclusive and based on social justice (Engelbrecht, 2005). Research continues to ensure that these principles are embedded in both the curriculum and its presentation in textbooks.

Hummel (1988) also recognises that, “Texts are indispensable working instruments for cognitive development” (p. 17), and views the pedagogic approach of the text, the way material is structured, organised and the references it makes to other disciplines, as important factors that influence the educational process. Analysis of these avenues would indicate whether texts are suitable and would also ensure that material in texts is appropriately geared and regularly updated for the learner. Cognitive development is a field of study in psychology which focuses on a child’s development in terms of information processing, attention, perceptual and conceptual skill, memory, language learning and thinking (McLeod, 2015). From the late 1950s to the 1970s the theories of Piaget provided the framework for understanding the curriculum in Britain. This framework was fundamental to the understanding of children’s scholastic performance. Peel, a professor of psychology at Birmingham University, studied this theory of children’s textual reasoning, particularly their comprehension of written material in English and history. He focused on learners’ ability to understand how

effects are related to causes, how to follow an argument, and then allow reasoning to clear a pathway for evaluation.

Textbooks writers have long realised that a child's development stage and age is vital for the commencement of teaching. Piaget's work in this field allows us to understand the patterns of development and growth. There are expectations that textbook authors and publishers be aware of students' age and stage of development before the contents of a textbook are put together. Textbooks are designed so that information in the form of text and images can be processed with ease. For effective learning from a text to take place, the information presented is expected to be controlled. Material is expected to be age appropriate and to cater for the various cognitive levels. Learners are expected to acquire a range of skills from textbooks which, Alderson and Lukwani (1989) argue, can be ranked from 'lower' to 'middle' and then to 'higher' order skills. Such an ordering will allow learners to acquire skills which can demonstrate their abilities. Some CAPS-compliant history textbooks are accompanied by teacher guides which stipulate how each of their activities and tasks are ranked according to these orders. The CAPS document for the Intermediate Phase, social sciences (2011, p. 48) stipulates that formal assessments must cater for a range of cognitive levels. Table 2.5 shows these levels:

Table 2.5 Cognitive levels in CAPS formal assessments

Cognitive Level	Percentage
Lower order: Knowledge and recall	30
Middle order: Comprehension and application	50
Higher order: Analysis, evaluation and synthesis	20

Raising teacher awareness of the nature of the textbook representation can allow them opportunities to teach purposively to create the balance. Since the inclusion of sources in textbooks is considered part of the subject's disciplinary endeavour, it is important also to view how textbooks present them and how teachers and learners interact with them. For instance, some textbooks do not offer sufficient historical sources and teachers may therefore find it difficult to teach the value of evidence and how to construct narratives or interpretations.

How students learn history has implications for how textbooks should present knowledge. Textbook authors have certain notions of how students learn in history, even though they cannot assume that all learners can process the information in texts successfully. Of most importance is foundational school history (history in the formative years or lower grades) which is expected to prepare the learner with sufficient disciplinary skills and knowledge to cope with the subject in higher grades, especially if learners choose to study it further than Grade 9. There is a need for studies on learning history to be initiated in order to establish how the critical and analytic thought processes in learners at this basic level are being developed. A basic repertoire of historical skills must be developed in the early stages, so that deeper associations at a higher level can then be effected. Learning resources, inclusive of in-depth activities in textbooks, represent scaffolding for learners to progress to the complex levels. Wineburg (2001, p. xii), a researcher in cognition, wanted to establish “what concrete acts of cognition lead to sophisticated historical interpretation”. Therein lies the implication that concrete, simple acts of cognition are building blocks, or scaffolding, for later development of historical thought. Wineburg’s comprehensive research on history instruction (2001, p. 45) led him to conclude that despite a lack of school-based instruction, students “were hardly blank slates” when it comes to historical knowledge. He acknowledged that new knowledge is built on the foundation of the existing knowledge. Textbooks, and the new information they present, should allow learners access into a steady stream of historical knowledge. Despite the importance of this, Ambruster and Anderson (1984) state that some textbooks fail to address certain historical issues, or they presume a certain background knowledge which children lack. If learning is to occur in a linear process, where knowledge is built up piece by piece, with each piece offering a meaning, there should be a body of knowledge already in place. In other words, a cognitive structure would have to be established for the ‘bits’ (facts) to come together as a whole. Such a structure is not sophisticated at the beginning of a child’s life, but is a gradual development of simple acts leading to better ordered skills in the ordering of information.

Wineburg (2001, p. 47) contends that, “The work on text design and analysis demonstrates that cognitive principles can be used to make a History text more

‘considerate’ ”. It can also be argued that the ‘inadequacy’ of the text can decelerate pupil progression in development (Mckeown & Beck, 1991 as cited by Leinhardt et al., 1994). In this regard, Mckeown and Beck (1991) researched young learners’ ideas of U.S history by manipulating textual presentations of central historical events and concluded that the learners came out of their experience of history with confused ideas of the simplest historical notions. Hallden (1994, cited in Leinhardt et al., 1994) contends that history as an academic discipline is different from history as a school subject, and that in the absence of historical knowledge, nothing can be learned from a given piece of evidence.

2.4.3 Disparities in textbook presentations of knowledge

This section discusses some examples of how textbook presentations of knowledge can do very little to enhance critical thinking or progression in learners of history. Being aware of such disparities alerts both teachers and textbook authors of how presentations, or the internal construction of information in the textbook, can detract from learning analytic history. Attention is drawn to that fact that there is raised awareness and concern over whether the content of history in its new form creates a coherent understanding of historical events and their chronological nature.

Understanding around historical meta-concepts such as time, change, cause, evidence and account is still in the process of being developed. Newer texts, in the effort to present a somewhat comprehensive version of history with each curriculum change, sometimes skim the surface of certain themes, resulting in a rather superficial account of history. It also seems that textbooks take for granted the necessary prior knowledge to a topic and assume that the way knowledge is structured in the textbook is sufficient for the learner. Often, the idea of change, continuity and progress is weakly presented, due to the emphasis of everyday knowledge at the expense of substantive knowledge. Teachers and learners are expected to ‘fill in’ the gaps arising from the lack of substantive information. Learners too, are expected to improvise on their own by reading and researching the events under study independently.

Disciplinary history requires that learners consult a variety of sources to construct narrative accounts with an appropriate balance in both the substantive and procedural dimensions. It can be argued that textbooks can be used as historical sources in the

classroom, so that learners can access a variety of presentations and interpretations. Chisholm (2008) specifically recommends that teachers consult a wide range of books and sources to prepare for a lesson. From her study in Rosettenville, she established that teachers who were using a Grade 6 *Shuter & Shooter's* social sciences textbook believed that it conveyed appropriate information about history, while it also developed skills and values of learners. However, Chisholm's (2008) analysis of this text indicated that only small chunks of information were taught and a sense of the bigger picture was lost. In addition, the study showed that new inclusions in history brought new exclusions, that content and discourse were presented in 'fragmented' ways and that "the challenge of coherence, content and progression", as outlined in the Curriculum Review Committee of 2000, had not been addressed. The texts were also limited in historical content, with fewer pages allocated to history than geography. Chisholm (2008, p. 18) concluded that the new model text was "light years from its predecessors", and that it was "generally chronologically weak, often superficial, and extremely information poor".

A further example of textbook discrepancies is alluded to in my earlier study (Bharath, 2009), where an analysis of sampled textbooks indicated that they did not give learners a sense of chronology, space and time. Bertram (2008b, p. 160) argues that chronology is still a key ordering principle in history and that it relies on time and explanations of cause and effect to create its narrative. In this study, I also found that insufficient historical procedures were utilised in the sampled history textbooks; it suggested that both procedural and substantive knowledge were endangered in the newer textbooks and that learners in the GET band were not provided with sufficient procedural skills and substantive knowledge in the discipline of history. Beets and le Grange (2008) argue that pupils develop a critical understanding of the nature and use of sources by working with them in particular ways. They contend that the process of distinguishing between sources and evidence, gathering information from sources and making deductions based on the information, promoted disciplinary knowledge. Wineburg (2001) describes this as typical when historians work with sources in specialised ways. It is expected that learners of history also work in this manner.

Bharath (2009) also showed that these requirements, concerning an enquiry-based approach involving the appropriate utilisation of sources, were not sufficiently dealt

with by the sampled textbooks. There were insufficient opportunities for learners to engage with historical ‘evidence’. They were also not required to interrogate different source material which would allow them to form different interpretations and understanding. Source material was minimal and information supporting material labelled as ‘source’ was insufficient to generate any in-depth discussion about the origin, development and contextualisation of the source. Questions and learner activities in the texts, based on the sources, often merely involved the extraction of generic information from the source. The learners’ ability to use source material to foster debate and argument was not developed. Therefore, learners using these textbooks would not be able to use the heuristics of a historian: sourcing, corroboration and contextualisation (Havekes, Coppen, Boxtel & Imants, 2009, p. 2), because of the limited opportunities for them to develop critical and analytical thinking. This kind of scenario in textbook presentations does little to enhance critical thinking or its progression in history. It is for this reason that I include Morgan’s tenth recommendation for textbooks. Morgan (2011, p. 298) directs textbook authorities to “scaffold critical historical thinking by providing reading cues and making methodological choices of the professional transparent, including proper source references and referring readers to other material. This includes clarifying underlying assumptions”.

2.4.4 The influence of textbooks on reading and writing of learners

According to Short (1994, p. 541), “Social Studies generally relies heavily on the textbook (and teacher’s lecture) to present the bulk of information students are expected to learn...The amount of reading and writing in a Social Studies class surpasses that in most maths and science classes and the reading passages are long and filled with abstract and unfamiliar schema that cannot be easily demonstrated” (cited in Schleppegrell, Achugar & Oteiza, 2012, p. 72). The textbook is identified by Schleppegrell et al. (2012) as the primary source of disciplinary knowledge, and while these scholars argue that the content and language of the text cannot be separated, they advance that the content in schools is presented and assessed through language, thereby making language the key challenge to learner progression in history simply because language becomes increasingly complex and abstract as learners pass through grades.

The shift of the lens onto the language in text opens up entirely new debates on analysing progression. For the purposes of linguistic analysis, Schleppegrell et al. (2012) use Martin's (1991) and Unsworth's (1999) studies of Australian middle school history textbooks to identify key linguistic features of historical discourse. Among these are nominalisations (transformation into a noun/nominals to reorganise clauses) and ambiguous use of conjunctions and ill-defined phrases which challenge students. The manner in which authors of textbooks fashion the language of the text and the vocabulary choices they make, creates challenges for learner understanding. History textbooks, Schleppegrell et al. (2012) argues, present limited explanation of terms and events. Coffin (2006c) distinguishes between the language demands of school which is specialised, compared to the language of everyday life. There is an understanding that the academic language of the school and textbooks is different from the informal, interactive language of spontaneous face to face interaction. This idea is developed by Cummins' (1984) distinction between two differing language types called BICS (Basic Interpersonal Communication Skills) and CALP (Cognitive Academic Language Proficiency). BICS refers to the 'surface' skills of listening and speaking (or everyday skills) acquired rapidly by students, while CALP refers to the basis for a child to cope with academic demands from different subjects (increasingly subject-specific, technical and abstract). Cummins (1984) uses this continuum model to categorise the tasks pupils engage with, from cognitively undemanding to cognitively demanding and from context dependent (strong contextualisation) to context independent (weak contextualisation).

A context embedded task, described above, is one where students have access to a range of visual and oral cues and meaning is easily acquired. A context reduced task is one such as reading dense text where the language is the only resource. Schleppegrell, Greer and Taylor (2008, p. 176) argue that the language of texts, called academic language, presents information in new ways, using vocabulary, grammar and text structures that call for advanced proficiency in this complex language. New challenges are presented to students to learn to recognise, read, and adopt when they are writing. Teachers face the challenge of simplifying and decoding the dense texts, while students are faced with new difficulties of recognising and reading the material.

Martin (2013, p. 23) undertakes to view these technicalities and abstractions in subject-specific discourses in relation to high stakes reading and writing. Within the

field of systematic functional linguistics (SFL), he advances concepts of power words, power grammar and power compositions for teachers to use as tools to build knowledge. Martin (2013) describes the transition from Primary to Secondary Phases as a shift from basic literacy to subject-based learning which is composed of specialised discourse of kinds. This, in turn, has impacted genre-based literacy programmes aimed at mastering writing for different purposes (recount, narrative, report, procedure, explanation, exposition) (*ibid*). Derewianka (2003) contends that genre-based teaching is very influential, as genres are opportunities to teach grammatical structures in context. Cited in Derewianka (2003, p. 143), Bakhtin (1986) contended that learning genres is a fundamental to language development. This trend is presently noted in the teaching of English as a subject, where specific genres are included and spread across the annual teaching plan so that when a learner completes the GET, they have completed most of the reading and writing genres. Progression across the grades is noted in the length of the text the learner is required to read and write, as well as in grammatical resources.

2.4.5 Reading and writing history as a set of genres

The previous discussion links the particularised and structured manner of reading and writing in history to progression. Coffin (2006c) argues that these processes are related to the language that drives history, which she refers to as subject-specific. She maintains that history, like other school subjects, has a specific language and that each piece of writing in history has a distinct purpose relating to wider disciplinary practices, which she titles as ‘genre’ (p. 1). She indicates that Systematic Functional Linguistics (SFL) is an area in which linguists have developed tools to analyse how language functions as the means through which knowledge and skill are transmitted. Coffin elucidates that professional and disciplinary knowledge is re-contextualised for school use and that the disciplinary purposes are played out in language via the texts students are required to read and write (*ibid.*).

Coffin (2006a. p. 12) highlights that over the last two decades, “the ability to read and write at different levels of sophistication has become an increasing concern for Western governments”. Learners of history need to understand text structure in historical enquiry in order to produce the different types of historical writing required. Thus, learners learn text organisation while making effective use of dates and terms in

their production of different texts, thereby fulfilling the purpose of school history, which is to develop students' ability to sequence the past.

Coffin (2006a) maintains that history teachers should teach modelling of the structure of different types of writing in history to enable students to be increasingly independent. The Curriculum and Assessment Policy Statement (CAPS), for Grades 7–9 in the social sciences curriculum (2011, p. 8), states that learners should be trained to speculate, debate, make connections, to select, to prioritise and to persist in tackling real issues and important questions. It further recognises that language is an important element for both history and geography, and different forms of text (oral, written and visual) are central to both disciplines. That learning takes place through interaction with these texts, is an added recognition. Every teacher is recognised as a language teacher. Thus, writing is a skill that is developed through these two subjects. The policy document advises that learners should write regularly with a clear progression in length and complexity through the grades, clearly stipulating that the CAPS language documents which specify levels of requirement for writing should be consulted throughout (p. 8). This document spells out for the teacher the length of the text the learner is supposed to write in each grade. A closer perusal indicates a steady increase in the number of words a learner is required to read, write and produce in text, and that genres are of equal importance in this subject, as the type of writing a learner is required to produce involves a selection of various genres so that a learner is introduced to all in the respective grades and obtains the experience to produce all at various lengths.

Building on Coffin's ideas, Schleppegrell (2012) explains how a narrative is seen as using different kinds of grammatical resources as the text unfolds (more active doing processes in the main part of the story and more reflective being and sensing processes in the final evaluative stage). The focus of the SFL lens on a narrative text allows teachers to identify how grammar functions to make different kinds of meaning at different points in a text. SFL seeks to describe how language choices are influenced by particular factors in the context: 'what's going on?' (field or subject-matter); 'who's involved?' (tenor); and 'what channel of communication?' (mode). Together these form the register. To these Martin (in Christie & Martin, 1997) adds 'what's the social purpose?'

It can be argued that the indications of complexity or progression are signalled by the patterns of grammar within and across texts. Nominalisation is another language resource used to understand how some texts present decontextualised language of academic knowledge. It is a process whereby events (normally expressed as verbs) and logical relations (normally expressed as logical connectors) are packaged as nouns. Drawing from Coffin (2006b, p. 52), the process is illustrated in sentences 1–5, where processes (underlined) and logical connectors (in bold) are turned into nouns (double underlining):

1. Australia was involved in the Second World War for six years and **so** things changed economically, politically and socially.
2. **Because** Australia was involved in the Second World War for six years, things changed economically, politically and socially.
3. **Because of** Australia's six-year involvement in the Second World War, there were economic, political and social changes.
4. Australia's six years of involvement in the Second World War led to economic, political and social changes.
5. The consequence of Australia's six-year involvement in the Second World War was economic, political and social change.

This results in a text becoming quite dense and abstract. These ideas will be elaborated on later in the theoretical and conceptual framework.

Apart from grammar patterns signalling progression, Fang and Schleppegrell (2010) argue that school knowledge, reflected in the language transmitting it, becomes increasingly abstract, dense and complex. Textbooks used in earlier years are described as nontechnical and involve simple clauses which can be read with ease, while texts engaged with in later years tend to present technical abstract vocabulary with dense, compacted information. According to Coffin (2006a), children and teenagers employ different linguistic resources in the creation of narratives and recounts. While children choose to use simple clauses to get the message through, teenagers prefer more complex clause combinations to evaluate situations and organize text. Halliday (1985) purports that teenagers make more frequent use of clause embedding, which signals abstraction. There is then the expectation that texts

produced for learners as they step into advancing phases would present information with greater clause embedding, which can signal progression.


In a study, six texts from different individuals were selected according to their age and the texts revealed that there is a substantial difference between pre-adolescents and mid-adolescents' construction of meaning in the observed genres (Christie & Martin, 1997). While the former group wrote simpler texts with less abstraction, the latter group managed to reach abstraction to a great extent through the use of more complex nominal groups and grammatical metaphor. Christie and Martin (1997) claim, when analysing texts produced by students of different ages, that most of those texts gather around report and explanation in science as a school subject. Report and explanation are two significant genres in inducting the young scientist into the field. The students commence composing argumentation and discussion essays at a later developmental phase. This could perhaps be true for the young historian.

In terms of writing development, movement is observed from common sense to uncommon sense, from immediate to abstraction and from simple to more complex. Earlier studies have concluded that the trajectory of writing development from common sense to uncommon sense, from immediate to generalisation and then to abstraction have also been observed in history genres. The historical genres are mainly divided into two groups: the chronological group of recounts, empathetic autobiographies, biographical recounts and historical recounts, as well as account; while the non-chronological genres consist of site and period studies (Derewianka & Jones, 2012).

Students, at a certain level of maturity, start using diversified ways to realise attitudinal lexis and grammatical metaphor; in addition, the processes they exploit become diverse and specialised (Martin, 2007). Autobiographical recounts in school history are normally written in the first year of schooling (or indeed primary schooling), and as a result, they have a relatively simple style. The lexical density (i.e. the number of lexical items per clause) is often low for written language (Coffin, 2006a). According to Greer (1988, cited in Schleppegrell, 2012, p. 212) "it is through writing that we learn to think and make meaning and that writing has specific characteristics relevant to the subject". Thus, in relation to history, writing needs to reflect the disciplinary thinking of constructing arguments and reaching conclusions,

through the use of evidence. According to Martin (2007, p. 58), “factoring a discipline as a system of genres clearly recontextualises that discipline”. He argues that the secondary school reworks the content with value and texture so that they take the form of text types that students need to read and write. In Table 2.6 he outlines an exemplary factoring of history as a set of genres ordered as a learner pathway. It commences with genres similar to those that students are familiar with in the oral culture outside the school, moving on through those particular to history, including various chronicling genres, then moving on to argumentation genres. These are then arranged on a vertical topological vector running from common to uncommon sense, the genres are presented as a system network, SFL style (p. 59), drawing from Coffin (1997, 2000); Martin (2002); Martin and Wodak (2004); and Martin and Rose (2005), in Figure 2.1.

Table 2.6 Factoring modernist history as genre (learner pathway) (Martin, 2007, p. 58)

<i>Genre [staging]</i>	<i>Informal description</i>	<i>Hurdling</i>
personal recount [Orientation^Record]	agnate to story genres; what happened to me	
autobiographical recount [Orientation^Record]	the story of my life [oral history]	
biographical recount [Orientation^Record]	the story of someone else's life	
historical recount; [Background^Record]	establishing the time line of 'grand narrative'	
historical account; [Background^Account]	naturalizing linearization of 'grand narrative' as causal	
factorial explanation [Outcome^Factors]	complexifying notion of what leads on to what	
consequential explanation [Input^Consequences]	complexifying notion of what leads on from what	
exposition – one sides; promote [Thesis^Arguments]	problematic interpretation that needs justifying	
challenge – one sided; rebut [Position^Rebuttal]	problematic interpretation that needs demolishing	
discussion – multi-sided; adjudicate [Issue^Sides^Resolution]	more than one interpretation considered	

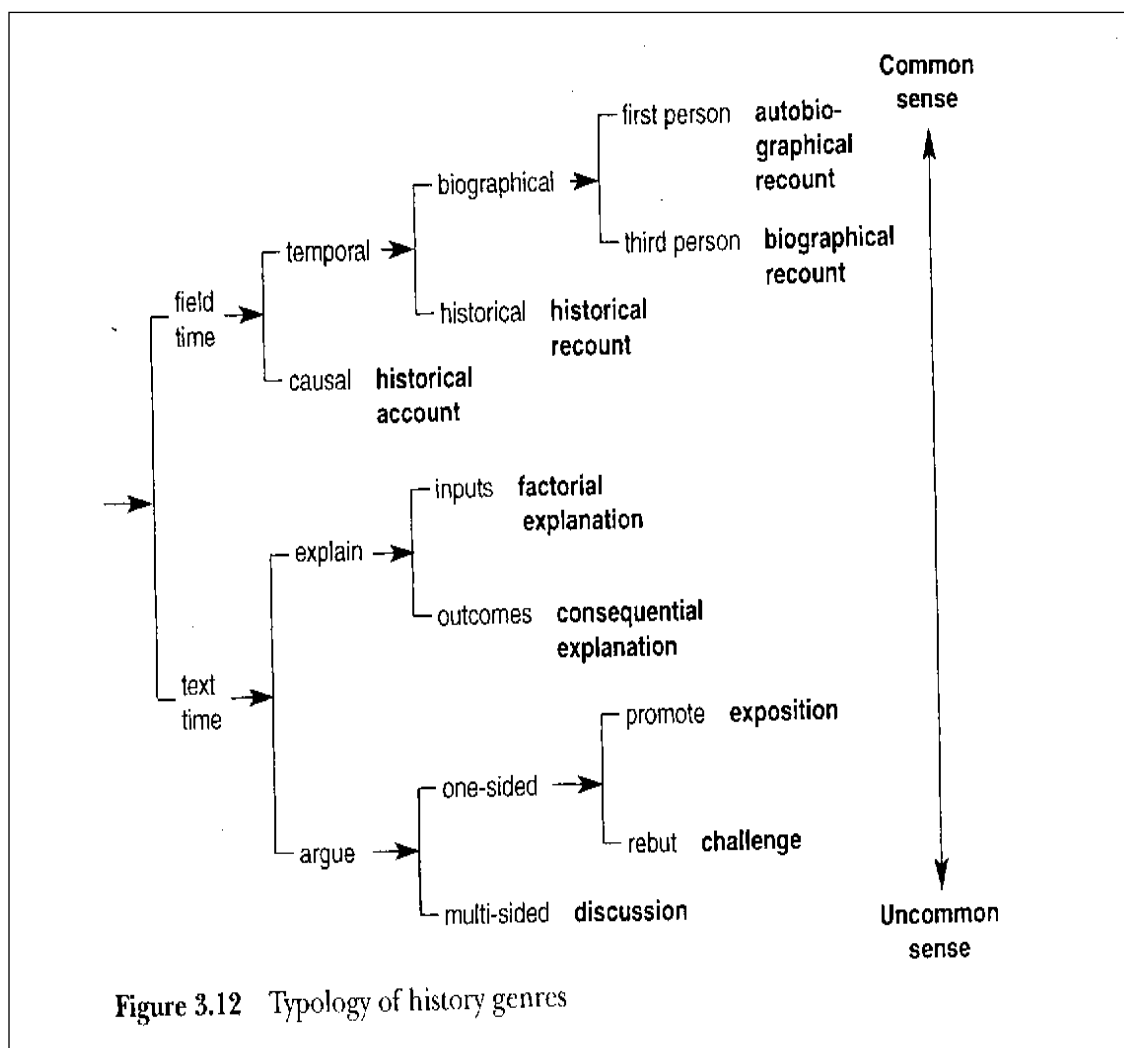


Figure 2.1 Typology of history genres (Martin, 2007, p. 59)

Drawing from Martin (2007, p. 58–59) above, I reconstituted a merge of these two diagrams and use it as a tool to analyse the textbooks in my sample. The process is described in depth later in Chapter Six, where it becomes operationalised as Level Two of the analysis. The theoretical and conceptual frame in Chapter Three presents more on the theorists within SFL and the influence of genre presentation on reading and writing of learners. Then, the links with theory are made to show how the concepts work in the analysis of the textbooks.

2.5 Conclusion

In this chapter, to locate this study in the context of previous research, I navigated the vast field of textbook research to identify an existing and credible body of knowledge, both nationally and internationally. An exhaustive review was constrained by the

vastness of contributions to this field to date. Drawing from the earlier theorisations and conceptions of scholars, this literature review is organised by theme, topic and relevance, which according to Mcleod (2003, p.19), brings “some order and organisation to the material”. The purpose of the review was to contextualise my study amongst others, on the basis of particular lacunae identified in the South African context. Scholarly instrumentation in textbook analyses was also reviewed so that a calculated decision could be made around my own selection. In the process, I have defined the accumulated scholarship population so as to direct this study and its research rationale.

The objective of this chapter was dual pronged: To review what has been written about history textbooks, including the various ways in which they can be analysed. To locate available literature on progression in historical thinking. I structured the chapter into various sections, each providing details on the development of history as a discipline, developments in history education, international and local studies as well as their foci, curriculum transformation and reflections on the textbook, also considering critical issues in the South African publishing arena which is currently providing the Department of Education with its graded texts on various criteria stipulated by the department. The fundamental strategy in the structure of the review was to obtain a global overview of all the literature on progression. The phenomenon of progression in historical thinking is merely alluded to in previous scholarly work, and without any previous methodology to mimic, I calculated my path through what has been written to find possible ways to describe the signals of progression.

For this, I considered the form and nature of the textbook, including its new updated profile and presentation, which has recently been linked to a certain kind of literacy. Scholarly discussion on language, the means to transmit historical knowledge and its reflection in structured reading and writing tied to specific disciplinary traditions, is the route I chose to follow. The review points to the fact that textbook research is a fundamentally fertile area for study, particularly in South African history where, I argue, there is much focus on themes linked to ideology, racism, gender representation and curriculum transformation amongst others. That sort of emphasis is justified, given the history of the country and its birth into democracy. However, there

has been a great amount of research in these areas and there needs to be a focus on the discipline of history and the knowledge structure itself.

Following international trends, there has been some attention towards understanding historical literacy, historical consciousness and the nature of historical knowledge, albeit on a smaller scale. I view the area of knowledge structure as one in which there is a significant lacuna and thus adjust my lens onto matters of the textbook and how a range of curriculum compliant textbooks actually builds progression in historical knowledge. This type of lens is created out of the understanding that progression is not understood in the sense of advancement of one grade to the next in the arena of achievement, but rather in a specialist sense where history is 'done' and the past is studied using a disciplinary lens. This kind of progression is a nuanced historical thinking which advances through the phases of school history and which many scholars have described as a type of historical literacy, historical reasoning and consciousness.

Since this study is based on the assumption that textbooks are one of the chief resources used by history teachers, the structures of progression within them can signify advancement. My interest, therefore, lies in the location and description of these structures and in their deconstruction, so as to evaluate how they can be defined and refined. In this chapter, I condensed these descriptions to three salient sections, each building on the understanding of the previous one. I first reviewed general literature on the textbook, then analysed the shape of history and the South African curriculum reform, and finally, undertook an in-depth look at the structural concepts and elements at work in textbooks.

CHAPTER 3

THE THEORETICAL AND CONCEPTUAL FRAMEWORK

3.1 Introduction

It has been argued that there is no such thing as a literature review and that it is outdated because it permeates all the early chapters of research (LaCompte & Preissie, 1993). It is also suggested that a conceptual framework replaces it because it is the ensemble of related concepts that directs the research (*ibid.*). While they are very similar, I argue that the conceptual framework is more nuanced and details more about the various theories and concepts that spring from the literature. I specifically used the literature review to describe the work that has been done in this area of study. However, in this chapter, I combine the theoretical and conceptual fields because it is from these theories that the related concepts are drawn, which the study operationalises. I incorporate and intersect various theories to understand the phenomenon of progression, following closely Abd-El-Khalik and Ackerson's (2007) suggestion that researchers use more than one theory to underpin their work. Whilst others may disagree, Miles and Huberman (1994) purport that a conceptual framework is the same thing as a theoretical framework. I argue that a combination is suitable for this investigation because the concepts are embedded in the theories being used.

In order to make sense of the phenomenon, the theoretical and conceptual frame of this study is built out of a fusion of theories from psychology, history education, the sociology of knowledge and SFL (Systematic Functional Linguistics). To analyse progression in textbooks, important theorists from psychology are identified, like Piaget, Bruner and Hallam, who describe the different intellectual levels at which learners operate. Bernstein, a theorist from the field of sociology of education, was critical for describing knowledge structures and the different discourses, while Lee and Ashby, Lévesque, Shemilt and Bertram were useful scholars from history education that provided the key descriptions of historical concepts. Bloom's Revised Taxonomy (Kratwohl, 2002) is used to analyse finer distinctions in knowledge and cognitive processes. Coffin, a major theorist and scholar from Systematic Functional Linguistics (SFL), and Martin (2007) were added to make sense of the language and

genre which pervades textbooks. This elaborate conceptual field can only be complemented by an equally elegant research methodology, which will be described in greater detail in the chapter designated for that purpose.

Disciplinary history or academic history is engaged with by professional historians using very specific and specialised skills, and South Africa has chosen to emulate and enact this in the school history curriculum. Learners doing school history are expected to follow the curriculum in terms of this disciplinary requirement. However, there is debate about whether school history should be that which historians practice. Theoretically, Bernstein's pedagogic device shows how knowledge is recontextualised from its disciplinary form, through the official curriculum, to its reproduction in schools and textbooks. While there is a definite relationship between school history and academic history, Johnson, Dempster and Hugo (2011, p. 27) claim that a school subject is not the same as its parent discipline. Their contention is that the parent discipline needs to be reflected in curricula so that the reproduction of specialised knowledge is not undermined. The same would apply to school textbooks representing the curriculum. Muller (2007, p. 80) contends that, "If recontextualisation totally severs any relation [between the parent knowledge structure and the recontextualised school subject], then how are specialised knowledges ever reproduced?" My study examines how knowledge within textbooks is specialised, with particular reference to the procedural and substantive dimensions and specifically to how they advance.

Bernstein's categories of analysis were suitable for the specific understanding of horizontal and vertical structures of knowledge, but became restricted in their ability to describe the procedures in history which inform historical thinking. Therefore, Bertram's (2012) language of description for the "domains of practice for School history" was utilised for its explanatory power and salience to this study, as it allowed content in textbooks to be categorised into procedural or substantive domains. These domains are operationalised with the understanding that the nature of historical knowledge is distinguished, by Peter Lee, as consisting of 'substantive' (first-order) and 'procedural' (second-order) knowledge of history. Lévesque (2008, p. 16) argues that the consideration of history in both its substantive and its procedural knowledge

can help clarify the notion of historical thinking. It is these complementary theories that enabled the construction of an analytic tool.

Collectively, the theorists from different fields provide “a set of interrelated constructs [concepts], definitions, and propositions that present[s] a systematic view of phenomenon by specifying relations among variables, with the purpose of explaining and predicting the phenomena’ (Kerlinger, 1970 cited in Cohen, Manion & Morrison, 2007, p. 12). Likewise, the definition of a concept is akin to the relationship between a word (or symbol) or an idea or conception. While ‘concepts’, as a definition, enables the construction of meaning, order and coherence to the world (Cohen et al., 2007), the selections that arise in this study are pivotal in providing meaning to the concept of progression. Later in the study, I use the definition of a ‘concept’ in a slightly different way that allows me to make sense of information in textbooks, extract the information as data, and then interpret it.

3.1.1 Theorists from psychology relevant to historical thinking

Cooper (1991, p. 2) states, “No agreed patterns of development in historical thinking which are based on cognitive psychology have so far been found, and the early stages of children’s historical thinking have not been adequately examined.” She also posits that it is important to establish these patterns so that progress can be planned and monitored (p. 13). Despite Coltham & Fines (1971) formulating a framework for distinguishing between ‘knowledge’, ‘skills and concepts’, ‘procedures and products of a discipline’, Cooper (2010, p. 22) states that the Department for Education and Science (DfES, 1999) stated that the skills and abilities which were identified as necessary to ‘doing history’ were recognised as generic skills.

Within the empirical knowledge of children’s learning, a body of information has accumulated concerning the ways in which learners normally make their way through a particular domain. This body of knowledge is underpinned by the cognitive development and cognitive psychology work of Piaget and Wineburg respectively, thereby representing the theories of intellectual development. It builds on Vygotskian sociocultural theory, which promotes an understanding of the psychology of learning in which socially encoded signs and tools are seen as the essence of mediated action (Wertsch, 1985; Minick, 1987 as cited in Morgan, 2011, p. 2). According to Karpov

(2005), Vygotsky considered *instruction* to be the avenue for mediating children's motives, cognition, and their social development (*ibid*). With this in mind Morgan (2011) can argue that textbooks, as instructional media, have the power to challenge learners cognitively and affectively, while teaching them history knowledge and critical interpretation which enables them to think historically.

Piaget (1926) posits a sequence in the development of logical thinking which provides a basic view. The formal characteristics of children's thinking and the concentration on the substantive concept applied by historians received much attention from the early Piagetian approach. According to Piaget, most children and adolescents find it difficult to conceptualise historical time, rendering them intellectually incapable of grasping history. Piaget identified four major stages of development where, over 11 years, the child gains the ability to use concepts and abstractions. An investigation into historical thinking by Roy Hallam (1975), showed that formal operation in history is not achieved by most adolescents before 16.5 years, even though children are expected to begin studying history in schools far earlier. The launching of the UK Schools' Council History Project (SCHP) coincided with Hallam's later work. Learning and teaching in history took on a renewed approach based on Bruner's (1960) *The Process of Education*. This approach held the view that any child could be taught any school subject if the structures of the discipline are sufficiently clarified. Once the structure of the discipline is determined, then effective teaching and learning can take place (Booth, 1983, p. 101). Research with 14–16 year olds led Martin Booth (1992) to conclude that adolescent learners had the potential to develop advanced reflections of the past, provided that sufficient opportunities were created for them to complete interpretative work. The processes, structure and content of history had to be emphasized. According to Booth (1992), the use of evidence, in pictorial form particularly, provided both primary and secondary pupils not only with skills to deal with historical evidence, but also with acquired factual knowledge of the eras. Free-flowing discursive discussion in class, argued Booth, should form part of an important oral technique that could facilitate the construction of factual knowledge into a meaningful whole.

Piaget's 'ages and stages' framework was challenged by Booth's research, which found it an inadequate tool to investigate historical reasoning because it was derived

from the natural sciences. Booth (1992) argued that *deductive and inductive* reasoning was used by scientists to develop theories and laws to explain the world, whereas historians differed, as they reached understandings through *adductive reasoning* by asking questions of the past and arriving at reasoned explanations after consulting with different facts and views. Booth's research laid the foundations for discipline-based curriculum development and teaching, emphasising the special nature of historical thinking and reasoning, and offered sound empirical evidence on how adolescents learn to reason historically.

The area of historical thinking received extensive research attention in the 1980s. The work done by Ashby and Lee (1987) centred on young people's capacity to empathise with people from the past, understanding their context, motivation and behaviour. Researchers discovered that in order to create an explanation for the events and circumstances, adolescents needed to 'imagine' the lives of people from the past to understand their actions and beliefs. In collaboration with Alaric Dickinson, in the Concepts of History and Teaching Approaches (CHATA) Project, Ashby and Lee (1997) pursued studies of how 7–14 year-olds develop their understanding of the concepts of evidence and explanation. This project focused on second-order concepts, dealing with progression in children's ideas about the nature of historical enquiry and their ability to construct an historical explanation. Children's development occurred along different lines and different times. Video recordings reflecting written responses from pupils and discussions about historical sources led researchers to use the data to create models that showed how the understandings of adolescents progressed. The research showed that the manner in which young people structured their explanation of historical events denoted progression. There was evidence of advancement and progression in powerful analytic structures that originated from simple narratives. There are many possible reasons for historical events, but young people are able to utilise evidence to reconstruct historical events and create accounts and explanations.

Later, Magionni, VanSledright & Alexander (2009) built upon what Kitchener (1983) called 'epistemic cognition'. They contend that teachers must know student epistemic stances to make pedagogical choices to foster learning development. Kitchener defined (1983) 'epistemic cognition' as a 'cognitive process enabling individuals to consider criteria, limits and certainty of knowing' (cited in Magionni et al., 2009, p.

188). According to Magionni et al. (2009) this is a significant educational goal. They therefore propose a three-term overarching model of progression in historical thinking, namely the ‘copier’, ‘borrower’, and ‘critical’ stances. The ‘critical’ stance promotes historical thinking by bridging the gap of not knowing to familiarity while balancing various views of the past. Being able to evaluate claims critically and formulate arguments on the basis of evidence is fundamental to historical thinking (Magionni et al. 2009). While this model may be influential in other contexts, it was not clear how this would be a suitable model for the analysis of textbooks.

While the above-mentioned theorists were important in the field of psychology, I made use of Bloom’s Taxonomy of Learning Domains which was created in 1956 under the leadership of educational psychologist Dr. Benjamin Bloom in order to promote higher forms of thinking in education. This involved skills such as analysing and evaluating concepts, processes, procedures and principles, rather than just remembering facts (rote learning). Constituting salient dimensions for analysing progression in textbooks, the taxonomy was a suitable tool which could be used later as a tool to analyse levels of cognitive demand in the texts. The three domains created by Bloom are the cognitive, the affective and the psychomotor. However, this study, concentrates only on the cognitive domain, as it is commonly referred to, for designing examination questions, textbooks, training and other educational and learning processes to ensure that levels in cognitive demand are sufficiently adhered to. In the CAPS curriculum, it is mandatory that all formal assessments follow the taxonomy and there are prescribed percentages of expected levels in different subject policies.

The cognitive domain involves knowledge and the development of intellectual skills (Bloom, 1956). There are six major categories of cognitive processes, starting with the simplest to the most complex (knowledge, comprehension, application, analysis, synthesis and evaluation). These categories are thought of as degrees of difficulty. The simpler category must be mastered first before advancing to the next. While there have been some critiques of using Bloom’s Taxonomy in history (Wineburg and Schneider, 2010), the taxonomy has been further nuanced as seen in the Revised Taxonomy (Anderson and Krathwohl, 2002).

Anderson and Krathwohl revisited the taxonomy and presented the Bloom's Revised Taxonomy (2002), changing the original names in the categories from nouns to verbs (Remembering, Understanding, Applying, Analysing, Evaluating and Creating). Thus the category of 'knowledge' in the original Bloom's Taxonomy is replaced with 'remembering' and there are now a range of different types of knowledge: namely factual, conceptual, procedural and metacognitive. The new version, together with examples and key words (verbs) and technologies for learning (activities), is user friendly and presents a pertinent tool for later analytic descriptions in this study.

Despite the taxonomy offering a sense of order in the thinking process, Wineburg & Schneider (2009) argue that Bloom's pyramid was popular but that it should be turned upside down in the history classroom, so that knowledge is not seen as a 'lower order skill'. They view knowledge of history to be similar to the process of building blocks which are assembled for making judgements. They regard the placement of 'knowledge' at the bottom of the pyramid as sending the wrong message about the importance of knowledge in learning, particularly in history where knowing 'what' is as important to 'how' knowledge can be deployed (ibid. p. 58). They however, agree that knowledge is a pre-requisite for the start of the learning process. Some may argue that Bloom's taxonomy is a generic tool for a study of history but I argue that it is so far the most consistently used tool for cognitive demand in South African schools. It is still used to guide the structure of examinations, tests and tasks and examiners are bound by percentages of the higher, middle and lower order requirements. Textbooks have also conformed to these levels and some teacher guides being used in schools present their tasks already graded in middle, higher and lower orders to guide the teachers in their selection of activities.

3.1.2 Theories from the sociology of education relevant to historical thinking

3.1.2.1 Bernstein's theories of knowledge

This study draws on the sociology of education, which focuses on knowledge and knowledge structures. In order for educational knowledge to be analysed, there has to be a language of description for this knowledge. Bernstein, a prominent British sociologist (1999), distinguishes between horizontal and vertical discourse and hierarchical and horizontal knowledge structures. His 'horizontal discourse' entails a set of strategies which are local, segmentally organised, context specific and

dependent. It is also likely to be oral, tacit and multi-layered. Conversely, his 'vertical discourse' is a coherent, explicit, systematically principled, hierarchically organised structure, very much like the sciences (Bernstein, 1999).

Within this vertical discourse, Bernstein makes a second distinction between hierarchical and horizontal knowledge structures. A hierarchical knowledge structure, exemplified by the natural science disciplines, is a structure, which attempts to create very general propositions and theories that integrate knowledge at lower levels and in apparently different phenomena (Bernstein, 1999). To this description Wheelahan (2010, p. 21) adds that knowledge is developed (produced), by generating *new* meanings and integrating them within existing frameworks to revise them. However, she contends that the way knowledge is produced has implications for the way it is reproduced in the curriculum in all levels of education. She thus describes the induction into these disciplines as an induction into hierarchical knowledge structures, which would entail progression within the discipline, depending on the capacity to integrate meanings at different levels. Students would need to understand the basic principles before moving on to more complex ones. Wheelahan (2010) thus argues that learning and curriculum are sequential. This view is supported by Muller's (2006) contention that students have to understand what comes before to understand what comes after.

In contrast to vertical knowledge structures, and still within the vertical discourse, Bernstein identifies horizontal knowledge structures, exemplified by disciplines in the humanities and social sciences as "a series of specialised languages with specialised modes of interrogation and criteria for the construction and circulation of texts" (Bernstein, 1999, p. 162). He suggests that the horizontal knowledge can have strong or weak grammars. Economics, mathematics and linguistics are cited as examples of strong grammars, each of these with a strong and clear syntax. These fields with strong grammars would be easily recognisable, while those with weak grammars would not, because they are less certain whether they are operating in any particular field. The field of education itself has a weak grammar, as concepts have many different meanings.

Moreover, Bernstein (1971) distinguishes between everyday knowledge and school knowledge, arguing that an emphasis on either of these two knowledge types in pedagogy or curricula can have different results in the classroom. He classifies school knowledge as formal and specialised, while everyday knowledge is more personal and localised where the context of the home plays a significant role in developing what the learner knows before they come to school. Bernstein (1999) views everyday knowledge as tacit, context bound knowledge, which can be oral and is relevant across contexts. School knowledge, conversely, is classified by Bernstein (1999) as explicit and hierarchically organised with a systematically principled structure. According to Bernstein (1996), school knowledge (academic), categorised as a vertical discourse, and everyday knowledge categorised as a horizontal discourse, are differently acquired and structured.

Studies have shown that the balance between the two types of knowledge can affect learners in different ways (Williams, 2001, as cited in Ensor & Galant; Hassan, 2001; Painter, 1999; Rose, 1999; Dowling, 1998). Research in various fields of study (Ensor & Galant, 2005; Dowling, 1998; Rose, 1999; Taylor & Vinjevold, 1999) has indicated that learners can be disadvantaged by the fusion of academic and everyday practice (cited in Bharath, 2009, p. 39). It can be argued that this disadvantage arises from an exclusive or heavy reliance on the everyday discourse. Naidoo (2009, p. 5), in a study of 'progression and integration', indicated that some historically disadvantaged schools did not provide learners with the opportunities to learn high level knowledge and skills, and that the dominance of the integration of school knowledge with everyday knowledge compromised the conceptual progression expected of school knowledge, thus disadvantaging learners. Disciplinary knowledge, therefore, is important for the acquisition of certain concepts. According to Hoadley and Jansen (2004), specialised formal schooling knowledge is acquired through specific language and concepts. They argue that when everyday knowledge overwhelms school knowledge there is a danger of learners not developing a systematic understanding of the discipline.

The overarching theoretical frame of this study is provided by Bernstein's field of recontextualisation and rules, which describe the regulation of selection, sequence, pacing and evaluation of knowledge within the textbooks (Bernstein, 1990, p. 185).

The field is the content of the textbook and the writers or designers of the texts are the key recontextualising agents making choices about how historical knowledge is presented. Bernstein (1975) defines the curriculum as the valid knowledge to be acquired, pedagogy as the vehicle for its transmission, and evaluation as the learner's realisation of this knowledge. Bernstein's pedagogic device (1990, p. 200) constitutes the message relay or principles by which knowledge (everyday, professional, disciplinary) is 'recontextualised' into educational knowledge. Knowledge production, recontextualisation and reproduction are the three fields that make up this pedagogic device. Bernstein (1990) adds that these fields are operated by a set of rules governing what knowledge becomes privileged and what affects this knowledge, how it gets recontextualised into the curriculum, and finally, how pedagogy and assessment transmit it.

3.1.2.2 Maton's concepts of decontextualized and contextualised knowledge

In Legitimation Code Theory (LCT), Maton (2013) highlights the significance for cumulative knowledge building by making 'semantic waves' in knowledge. These 'semantic waves' refer to the recurrent movement in 'semantic gravity' (context-dependence) and 'semantic density' (condensation of meaning) (Matruglio, Maton & Martin, 2013, p. 38). Both vary along independent continua of relative strengths. Matruglio et al. (2013) use LCT and SFL in tandem to identify the 'semantic gap' between knowledge that resides in high-stakes reading, and knowledge that students need to express in high-stakes writing for assessment. Historical texts exhibit weaker semantic gravity (strongly de-contextualised knowledge) and stronger semantic density (greater abstraction). The teacher mediates and 'unpacks' dense and abstract texts with the learners, weakening the semantic density (explaining difficult concepts) and strengthening the semantic gravity (contextualizing knowledge), so that the information is made accessible to the learner.

The language of textbooks often displays stronger semantic density in that a lot of ideas are condensed within terms, while at the same time displaying relatively weak semantic gravity in that the knowledge can be out of the learner's context, or decontextualised. The knowledge may not necessarily be dependent on a particular context, but can, instead, deal with more abstract principles or generalised phenomena (Matruglio et al., 2013). The teacher 'unpacks' the technical language in the textbooks

by providing concrete examples, thereby strengthening the semantic gravity (contextualising the knowledge). Providing simpler explanations in everyday language further elicits meaning, and so, weakens semantic density. The ‘semantic gap’, however, materialises when the learner has to write or produce texts of their own, which incorporates both technical terminology and acquired interpretations. The texts that are produced are expected to be strong in density (abstract and condensed) and weak in gravity (decontextualised knowledge). Producing these shifts up and down semantic scales, involves abstracting and generalising away from particular contexts to condensed, larger ranges of meaning into terms and concepts. Working with texts in these specialised ways, has a direct correlation with what is expected of disciplinary history. The following tables summarise these ideas, describing clearly the movement of knowledge both ways. Table 3.1 shows the shifts in semantic density and Table 3.2 shows the shifts in semantic gravity. Later, in the qualitative analysis, I use Maton’s concepts as a language of description to code and explain the position and movement of knowledge in the textbooks.

Table 3.1 Shifts in semantic density (Maton, 2013)

Semantic Density (condensation of meaning)	
Strong semantic density	←————→ Weak semantic density
<ul style="list-style-type: none"> - Many ideas are condensed within terms in the texts - Knowledge is dense and abstract - Not easily accessible 	<ul style="list-style-type: none"> - Simple, easily accessed meanings to words or concepts from experience or senses - Explicit and clear in possibly everyday language and explanation - Concrete descriptions

Table 3.2 Shifts in semantic gravity (Maton, 2013)

Semantic Gravity (context-dependence)	
Strong semantic gravity	←————→ Weak semantic gravity
<ul style="list-style-type: none"> - Knowledge dependent on the context - Language explicit and concrete - Easily accessed - Local knowledge - Contextualised knowledge 	<ul style="list-style-type: none"> - Knowledge not dependent on the context - Technical terminology and language - Knowledge abstract - Knowledge not easily accessed - Universal knowledge - Decontextualised knowledge

Bertram (2014, p. 7) contends that the concepts of contextualised and decontextualised knowledge are the useful principles for working with progression in history. Bertram's (2014) study showed that this principle is started in the lower grades, with narratives that are concrete and embedded rather than concepts that are abstract and, often, ideological. This can start with history content that is close to the learners' everyday world, such as their family history or the history of the local community where they live. These progression principles reflect the learning theories that suggest moving from concrete to abstract, from local to more universal knowledge. Progression, thus, according to Bertram, is found in the move from common sense, contextualised and individual narratives to uncommon sense, decontextualised and universal accounts.

The concepts advanced by Maton provide a useful part of the language that will be used to describe the appearance and form of knowledge in the textbooks. Maton's (2013) concepts are used to identify shifts in knowledge within the textbooks later in the qualitative analysis.

3.1.3 Theories from Systematic Functional Linguistics (SFL)

Various fields for alternate conceptual toolkits and integrated and intersected theories are explored to clarify phenomena, which is a process of cross-fertilisation. Reading *Taking Stock: Future directions in research in knowledge structure* (Christie & Martin, 2008) provided strong support in this study for a dialogue between SFL and the sociology of education, building on the achievements of Bernstein, Halliday and Hassan, who all made language central to their investigations.

According to Moore (in Martin & Christie, 2008, p. 109), the hierarchical knowledge structure described by Bernstein has the capacity to produce knowledge at "increasingly higher levels of abstraction, generality and integration and hence are able to produce progression in knowledge". Martin (Martin & Christie, 2008, p. 248) maintains that both history and English have horizontal knowledge structures, and that science possesses a hierarchical knowledge structure. However, Muller (Christie & Martin, 2008, p. 70) introduces a concept of 'verticality', contending that, while in hierarchical structures theory develops through integration towards more integrative and general propositions, the trajectory of development lends the hierarchical

knowledge a more unitary shape. In contrast, progress in horizontal knowledge structures occurs not through theory (Muller in Christie & Martin, 2008, p. 70), but rather through the introduction of new languages, which constructs a new perspective, new questions and new connections. Because the languages are incommensurable, they defy incorporation at the level of integration, and the possibility of knowledge progress, in the sense of greater generality, becomes strictly pegged (*ibid*). If that is the scenario, then the critical question is how does history as a horizontal knowledge structure build progression or ‘verticality’?

It seems that language plays a critical part in this explanation. According to Coffin (2010, p. 2), “language can stand between a student and success in school learning”. She elucidates that since Cummins coined the notion of Cognitive Academic Language (CALP), as distinct from Basic Interpersonal Communication Skills (BICS) (Cummins, 1979), most teachers are aware that academic language is distinctive from the informal, interactive language of spontaneous face to face interaction, and they have aimed to develop both types of language competence in students. SFL provides the language to distinguish precisely between them. Coffin (2010, p. 4) describes how the tools of SFL can be used to systematically describe and explain how and why different subjects such as history and science use grammar in quite distinct ways to build orientations to the world. She indicates the interesting endeavour of SFL, coming together with sociology of education, to better understand knowledge structures of different disciplines and school subjects alongside the role of language. She illuminates how the texts students read and write denote or make visible how language functions in helping learners build content. Special attention is given to nominalisation as one of the language resources, as gaining control over it is essential for getting to grips with the decontextualized language in academic discourse (Coffin, 2010, p. 5).

Coffin (1997, p. 200 cited in Crawford (2003) assigns the overall purpose of recording a series of historical events as they unfold in real time to the written narratives in school history texts. She contends that the organising principle in historical narratives is external time (In 1865... Fifty years later...etc.) rather than text time or internal time (Firstly... The final argument...). Social experience, thus, is given a beginning, middle and end structure. Relating to these structured experiences, Coffin (2006, p. 1–

2) clarifies how the way language operates in different school subjects is related to the different 'cultural' purposes and practices of disciplines such as history and science. She relates this to the concept of 'genre', which refers to different types of texts created for different subjects and for different purposes. She describes how disciplinary and professional knowledge (and their related texts and literacy practices) are to some extent re-contextualised for school use. Whilst the broader goals of the discipline remain important to the way school subjects are organised, Coffin (2006) considers how, when academic disciplines are recontextualised as school subjects, the disciplinary purposes are played out in language via the different types of texts students are required to read and write. She identifies that the important genres of recording, explaining and arguing in history need to span across the development phases of history learners, so that they are able to sequence past events. The genres have distinct lexical and grammatical choices that allow learners to build a record of past events in order to develop a historical understanding of those events. These considerations of Coffin's were critical for my own investigation, as I utilised her insights to produce a tool that could make explicit what textbooks were presenting to learners to read and what they were directed to write in the text activities to gain a sense of how it progressed. Coffin's idea of genre reading and writing allowed me access into a certain level of progression, a process that showed visible signals in the sample of texts.

3.1.4 Theories from history education relevant to historical thinking

3.1.4.1 Bertram's historical gaze

Bertram (2012) argues that in the field of history education, there is a specialist nature of history. The focus is on studying history as a discipline, which has both specialised substantive knowledge and specialised procedural knowledge. Bertram (2012) argues that when the discipline of history is recontextualised into the school curriculum, textbook writers and teachers vary the degree of specialisation of both substantive and procedural knowledge in order to make knowledge accessible to learners (p. 1). She develops a language of the description for knowledge that is integrated within a competence curriculum model in South African schools. Building on Bernstein's ideas of knowledge types and structures, she uses the specialised terminology to describe the nature of history knowledge. She argues that having a clearer language of

description for the domains of school history practice can support educators in making conscious decisions about how to move learners into the specialised domain where they begin to develop an historical gaze, thus gaining epistemological access into powerful knowledge structures (*ibid*).

Since history knowledge is said to consist of two intertwined strands of the substantive knowledge and the procedural knowledge, Bertram (2008b, 2012, p. 162) argues that in order for learners to develop an ‘historical gaze’ (similar to Dowling’s (1998) ‘mathematical gaze’), mastery over both substantive history content knowledge and its mode of expression are required. For this purpose, she uses Dowling’s (1988) work on the domains of school mathematics practice in order to describe possible domains of school history practice. Figure 3.1 shows the “Domains of school practice” for history (Bertram, 2012, p. 434).

Substantive knowledge	Procedural knowledge	
	Specialised (+)	Generic (-)
Specialised (+)	Esoteric (content clearly historical; language specialised, and specialised procedural knowledge that fosters historical thinking)	Expressive (content clearly historical; language specialised but generic procedural knowledge)
Generic (-)	Descriptive (content knowledge not specialised to history, perhaps located in the everyday; language unspecialised; specialised procedural knowledge that fosters historical thinking)	Public (content knowledge not specialised to history, perhaps located in the everyday; language unspecialised; generic procedural knowledge)

Figure 3.1 Domains of school practice for history (Bertram, 2012, p. 434)

This language of description provides a clear means to illustrate how school history is specialised as a discipline. The two domains of substantive and procedural knowledge can be described as specialised or not. Thus, further descriptions of possible pedagogies of access into the specialised domain are enabled. This map, therefore, provides an appropriate analytic tool that will be used to denote how knowledge in

textbooks can be categorised into these different domains. Knowledge featured in the textbooks can be located in any of the domains, and this location may be appropriate for a variety of reasons. The point is that there would be an awareness of the location and teachers can consciously adapt teaching so that it moves towards the specialist domain, thereby establishing an historical gaze. This gaze can be viewed as a gateway to sophisticated knowledge structures and thinking in history. The domains of school practice for history (Bertram, 2012) are, therefore, useful tools to code knowledge and will be used later to analyse the sample of textbooks selected for the investigation.

According to Bertram (2008b), it is necessary for history learners to understand that events in history are interpreted in various ways by different people at different times, which probably account for the alternative explanations provided by different people in similar events. Bertram (2008b, p. 162) argues that, in order to develop this ‘gaze’, there are at least three interlinked areas that are vital to induct learners into the speciality of school history. The first is a deep knowledge of the key events that have shaped our world, and knowledge of how these events are interconnected. The second area is historical knowledge and the ways in which history relies on chronology, time and explanations of cause and effect to create its narrative. A third area is an understanding of how historians read primary sources, and an understanding that sources can be read in different ways by different people at different times. These different readings give rise to the construction of different interpretations and different stories (2008b, p 162). The present study examines these three interlinked areas in a range of textbooks to understand how they develop this ‘gaze’, which translates into a nuanced historical thinking.

3.1.4.2 Other theorists on historical thinking

The study is further informed by the powerful ideas of Seixas (2006), Peck and Seixas (2008), Wineburg (2001), VanSledright (2004), and Lee and Shemilt (2003), who are prominent scholars in the field of historical thinking. Its focus is on ‘disciplinary history’, which can provide students with the necessary tools and concepts to engage in critical reconstruction of the past. The study is influenced by the changes in North America, Europe and Asia-Pacific (especially Australia), where there is a growing interest in teaching students about ideas and procedures needed to ‘do’ history, a move away from Memory-History. The highly influential School’s Council History

Project (SHP), established in the 1970s, influenced this disciplinary history movement. Based on studies of students' understanding of causation, change, evidence and empathy to engage in the study of history, the present study aims to understand how these concepts are depicted in a range of texts selected for analysis. Various theorists present their notions of historical thinking, and Martin's (2012, p. 24) collaboration of these is presented in Table 3.3 to show how different conceptions of historical reasoning, thinking and procedural concepts that give shape to the substantive are connected and similar.

Table 3.3 Models of historical thinking or historical reasoning (Martin, 2012, p. 24)

Historical Thinking		Historical Reasoning	
Wineburg (2000)	Seixas (2006)	Lévesque (2008)	Van Drie & Van Boxtel (2008)
Historical Thinking	Benchmarks of Historical Thinking	Historical Thinking Procedural Concepts	Components of Historical Reasoning
Sourcing	Establish historical significance	Historical Significance	Asks historical questions
Contextualisation	Use primary source evidence	Continuity and change	Uses sources
Close reading	Identify continuity and change	Progress and decline	Contextualises
Corroborating	Analyse cause and consequence	Evidence	Argumentation
	Take historical perspective	Historical empathy	Makes use of Substantive concepts
	Understand moral dimensions of historical interpretations		Makes use of meta-concepts of history

3.2 Conclusion

In this chapter, the theorists and the concepts that grow out of their work point to different structures of the knowledge that take on different shapes, forms and appearances. From the above discussion, it is clear that the language to describe these shapes and forms is available and can be approached in a multitude of ways. The substantive and procedural dimensions, if they can be ‘measured’ accurately, can oscillate between the terrains. I am interested in the long-term and short-term changes in children’s knowledge and understanding that take place as they progress through various phases of learning, and how textbooks construe it. With the intended analysis in mind, in this chapter I attempted to decode and deconstruct the methods textbook writers use to signify progression, not only in ascertaining the ‘ingredients’ of the construction, but also obtaining insight into this ‘method’.

I engaged with the major theories from the intersecting fields of education to investigate the phenomenon of historical thinking I first examined the theorists from the field of psychology to determine how historical thinking was signified in the field. I then analysed the impact of theories in the realm of sociology of education, specifically those of Bernstein, Maton and Bertram, before incorporating the SFL tradition in Coffin and Martin’s (2007) interrogation of genres in history, which strongly inform the mainstream analysis and later findings and discussion. All of these theories are complementary in engaging with the key ideas of historical thinking. There are other theorists that have contributed to development in the fields under study and these are international, national and local. The present study cannot articulate all of these given its nature and quest.

CHAPTER 4

METHODOLOGY

4.1 Introduction

The key purpose of this study is to engage with the question of how a range of school history textbooks map progression across different phases in the school curriculum. This chapter serves to clarify the research design and the rationale for the choice of textbooks. I provide a concise description of the research design employed to conduct the investigation. The objective was to unearth the nuances of the text which point to the phenomenon of progression in the procedural knowledge and substantive knowledge presented in each textbook sampled for the study. Armed with an elaborate theoretical framework and conceptual toolkit, I proceeded to analyse the textbooks using the methodology of content analysis.

Research into the methodology of content analysis of textbooks and historical thinking did not produce an analytic tool that can be replicated, primarily because it is a fairly new avenue for research. Nicholls (2005, p. 24) purports that while the analysis of textbooks is based on registering differences, identifying patterns and making comparisons, the critical analysis of information will differ according to the philosophical underpinnings (epistemological and ontological understandings) of the researcher. What one researcher may regard as significant knowledge can very well be deemed worthless to another. Researching a sample of history textbooks involves competing definitions of what constitutes ‘history’, and the analysis would be driven by epistemological claims on what ‘knowledge’ is. It is possible that after realising the relationship that knowledge has to power and politics, one would proceed to analyse the books according to one’s ontological understanding of what reality is (ontological understandings) (Nicholls, 2005).

4.2 Epistemological and ontological assumptions

Epistemology is the theory of knowledge concerned with the possibility of the truth of knowledge claims, even if these claims are revisable in the light of new evidence (Wheelahan, 2010, p. 39). Wheelahan cites Moore’s (2004, p. 157) claim that “Epistemology is concerned to establish how we can come to hold beliefs that (a) are believed to be true, (b) are in fact true and (c) can be demonstrated to be true”. Ontology refers to the nature of what

exists. This study operates with a critical realist understanding that the world is real and exists independently of one's conceptions of it. The question driving the research is how one gets knowledge of this world. The way we understand the world to be structured and constituted (the ontological), consequently sets boundaries around the way we gain knowledge of it (the epistemological). Therefore, one's understanding of the nature of knowledge would dictate how one would go about researching something. Wheelahan (2010, p. 53) states that the way we theorise the nature of the world has implications for the methods we use to explore it.

Critical realists assume that the world is structured in a particular way, and that it is the structures of the world rather than the structures of our mind that make our knowledge of the world possible. For Bhaskar (cited in Wheelahan, 2010), knowledge is fallible because the conditions for knowledge are to be found in the structures of the world, and the extent to which we have access to these structures is a contingent question and shaped by the particular social practices societies use to develop knowledge. Critical realism seeks to identify the underpinning generative (and rational) mechanisms that give rise to events in the world and our experience of them, and these may not necessarily be observable (e.g., gravity). It also invokes a causal criterion for making claims about what exists (Wheelahan, 2010, p. 56). An ontological commitment to realism has epistemological implications for the curriculum. In this view the social world exists independently of our conceptions and our knowledge of the world will always be fallible. Consequently, students are not taught one single truth, but need conceptual tools to make judgements about multiple possible truths. Realist argument is that there are theories to choose from even though they may be fallible, but they at least allow access to the natural and social world and present some approximation of the truth (Wheelahan, 2010, p. 71).

According to Wheelahan (2010, p. 72), our engagement with objects of knowledge are always socially and conceptually mediated. Our perceptions can be wrong and we often use theories to help us understand the world. Social realism, therefore, does not claim to describe the world exactly as it is, but instead attempts at reliable interpretations. In doing so, it develops knowledge and makes possible judgements. In the present study, there is the impetus to generate a reliable interpretation from investigation so as to make knowledge, while acknowledging the limits of what can be done. This study does not claim generalizable results, but rather offers an interpretation of the sample of texts that are analysed here. Whilst I attempt to be objective, as a researcher involved in several coding levels, I do acknowledge

that the absence of a second coder does constitute a limitation to the study. Another researcher could possibly come up with different data from the same texts. I acknowledge that the reliability of the various instruments can be compromised if the coding of the texts is inconsistent because of human error, coder variability (within coders and between coders) and ambiguity in coding rules. However, I argue that in any study there is always a margin of error and that, as a social realist, I offer an interpretation which, to my knowledge, is based on honesty.

There is much that is theorised about ‘historical thinking’, in the broad sense of understanding, but in-depth analysis in the field of school history and textbooks is a practical exercise that has not been attempted yet, to my knowledge. It was a challenge to construct a valid and reliable tool that could measure or signal ‘progression’ to describe the differences and make comparisons while critically analysing the information. A range of theories were used to allow various perspectives to converge to a point where the synthesis of an analytic tool was enabled. I examined and analysed the presentation of knowledge in the textbooks and converted these observations into textual and numerical data, which is essentially a combination or a hybrid of mixed data analysis (Mouton, 2001, p. 145). A combination of both qualitative and quantitative data brings a highly nuanced and detailed research design, yielding rich, comprehensive descriptions. This research design was guided and informed by the research questions, answerable by the methodology of content analysis.

4.3 Methodological approach

The study is located within the interpretive paradigm, utilising the methodology of content analysis. The interpretive paradigm is unlike the normative paradigm which depends on methods of natural science (Cohen, Manion & Morrison, 2007).

Cohen et al. (2007, p. 197) define content analysis as a “multi-purpose research method developed specifically for investigating a broad spectrum of problems in which the content of communication serves as a basis of inference, from counts to categorisation”. Stemler (2001, p. 1) notes that content analysis is defined as a ‘systematic, replicable technique for compressing many words of text into fewer content categories, based on explicit rules of coding’. Content analysis is identified as a ‘technique’ which can be applied to selected aspects of historical research in education which may illuminate the source of

communication, its author and its intended recipients. Holsti (1968, cited in Cohen et al., 2007) identifies an entire range of purposes for content analysis from describing patterns in trends in communication to techniques in persuasion. Analysis of textbooks at certain points in recent history was a means to indicate cultural differences, cultural censorship and cultural change (Cohen et al., 2007, p. 197). Research has shown that content analysis could be done in various ways and data can be accessed and described in equally creative ways. My approach to the analysis of textbooks under study here was directed by the nature of these textbooks as well as the purpose of the research. These considerations had specific bearings on the choice and form of instrumentation.

For this study, I identified appropriate units of analysis which would later form the basis for comparison across all seven graded textbooks. I extracted specific data from the textbooks and analysed them individually in different chapters so that each categorisation spoke to the purpose of the investigation, which is to describe progression. I deconstructed information that is already in a printed format. The units of analysis are the topics, headings, word boxes or word banks, stories and explanations, pictures, maps and other visuals, textbook activities and tasks. I used these different formats or ranges of information as units of analysis which were coded. Each unit of analysis allowed me to observe patterns and relationships. These configurations were seen in relation to the larger question of how historical thinking was developed through them. I wanted to understand how both the substantive and procedural categories shifted through the ways in which textbooks presented the information. Such a procedure would allow me to observe patterns and trends and so weave an understanding into how these textbooks developed historical thinking, based on how scholars have defined it. The quantifications and qualitative descriptions of the data in textbooks would then speak to how progression manifests across the textbooks.

The units of analysis were coded using different sets of categories (for example, the tasks were coded using categories provided by Bloom's Revised Taxonomy). In each level of categorisation and coding, I have detailed what the coding rules are. This is made easier by the fact that each level of analysis is preceded by a clear description of how coding takes place. Then I go ahead and present the analysis. The findings and discussion are then put together in Chapter 8.

The analysis was undertaken to code seven graded social sciences textbooks published for the new CAPS curriculum across the Foundation, Intermediate and Junior Secondary Phases. It uses a mixed-mode approach, effectively combining qualitative and quantitative data. There are qualitative descriptions of historical concepts and quantitative data showing the number of interpretative problem solving opportunities. The study uses counts and words to reflect the number and type of historical sources and describes procedures used in the texts, aiming to describe the progression in them, both in graphic and tabular form.

In order for this study to be plausible and credible, its design must be fully described so that its interpretations of the information presented by the textbooks can shed light on the manner in which textbooks reflect progression. This chapter seeks to document the data generation process as accurately and in much detail as possible so that it serves as a historical record for other possible researchers (Mouton, 2001, p. 105). There is the possibility that the data can be used for a secondary analysis, so it becomes essential that every aspect of the design, the procedures of data coding and the analysis is meticulously documented and recorded. This chapter, therefore, describes how my data sources were identified and selected, how the analytic tool was developed and constructed, the manner in which the data was generated and assembled and how it was captured, and then, finally, how it was analysed and cleaned for representation on tables. The findings are presented in the following chapters.

First, a detailed qualitative description of purposively selected chapters from each book is provided to represent my first glance at its presentation of content. This qualitative analysis allowed me to take note of my observations in the textbooks on my first read, to record what information appeared to stand out in appearance and meaning, how this information could be deconstructed into a quantitative output, and then proceed towards an in-depth analysis to explain the phenomenon of progression. The quantitative analysis would yield a corpus of statistical data from which it was possible to make further observations, and patterns would be noted. This would create new arenas for discussion and recommendation.

It must be acknowledged that textual data are rich in meaning (sometimes ‘multiple meanings’ or ‘surplus’ meaning) and are difficult to capture in a short and structured manner (Mouton, 2001, p. 108). For this reason, the coding employed in this study is exemplified for every step and choice, a process of layering the descriptions for the reader; the concise method employed is thoroughly described so that the study design can be replicated. It is also

acknowledged that numerical data (statistics, numbers and quantitative numeric data) are usually well structured and easy to capture, but not as rich in meaning as textual data (Mouton, 2001, p. 108). Thus, a combination of the two (textual and numeric) makes for a specialised synthesis of a large bank of coherent data. The deconstruction of this data bank into manageable portions culminates in patterns, trends or themes that establish rich and fertile ground for interpretation and discussion.

4.3.1 Sampling

Seven CAPS compliant textbooks used by teachers in the social sciences were selected for analysis. Each of them represents a grade from Grades 3–9. The graded social sciences textbooks are from different publishers that are listed on the Department Catalogue for LTSM. The Grades 4–7 textbooks were sampled from the different publishers, as they are easily available at the researcher’s school. The Grade 3 textbook is from the learning area called life skills, as there is no social science or history subject in the Foundation Phase. However, the key introductory ideas to history are represented in the curriculum for Grade 3 in their life skills textbooks. Teachers in this grade use life skills textbooks to teach historical concepts at this level. For this study, it was not a prerequisite that all the textbooks be published by the same publisher. The books are written by different authors, because the fundamental idea was to capture how the knowledge is directed and levelled at its basic entry point in foundational history and how it develops into a subject taught to senior students. The books are popular choices in various primary and secondary schools and five have been purchased in bulk for use at the researcher’s school. The other two textbooks for Grades 8–9 were chosen from the local and distant secondary schools where they are considered popular choices. Discussion was undertaken with senior educators of secondary schools and the books were chosen on their recommendations. It must be remembered that although history as a subject is presented separately from geography in the CAPS curriculum, each with its individual content, scope and time for instruction, the textbooks still combine the two subjects into one textbook for Grades 4–9.

4.3.2 Sampling method

The books sampled are those that are listed on the Department Catalogue for LTSM (2014). I engaged the textbooks published by Shuter & Shooter and Macmillan, as their books are popular choices at the researcher’s school, and other schools in the neighbourhood. Regular interaction and networking with other educators at workshops and meetings allowed me to

interact with managers and educators at various schools. At these meetings we would discuss the new curriculum and how educators were coping. We also raised issues of new material to service the curriculum. These discussions were fruitful in ascertaining which textbooks were being used at most schools. The decision to use this sample was, therefore, based on my interaction with various stakeholders. Educators said that the presentation of information in text closely resembled the order of topics in the curriculum and would be easy to use. Most educators confirmed that these books formed part of their choice because of the range of the activities they presented. These activities could be used extensively in history classrooms. These books are purposively sampled, not only because they are CAPS compliant and said to follow the curriculum closely, but they also presented very creative content with a colourful and attractive finish. Teachers are also provided with a teacher's guide to facilitate learning and teaching activities. The books also contain formal and other forms of assessment, which are graded or built into levels of cognitive demand. This makes it user-friendly for the teachers, as they now have to submit all forms of assessment for moderation by the head of department prior to their administration. This way, a range of criteria is engaged against the assessment to ensure that it conforms to department expectations. They have marvellous cartoons and photographs that make it very fun and lively for learner interaction and engagement.

The department policy is clear that every learner should have a textbook and it has produced a very clear textbook retrieval policy, directing schools to purchase books for learners based on the funds allocated and describes guidelines for the retrieval of loaned books. Since the books selected for the analysis are already graded, it makes it easier to ascertain what signals progression in the books and how progression is built into each book. Since publishers would have scrutinised the history curriculum before preparing and presenting the history in their texts, they would also have engaged, in some manner, on how to instil a levelled approach to the content, and so 'grade' the content and activities. This study attempts to understand how the writers of the textbooks scaffold or structure learning activities, at basic and advanced levels, as an indicator of progression. The curriculum lists topics, but textbooks provide the content, and in working with relevant activities the skills become apparent.

4.3.3 Rationale for the method

Content in textbooks takes the form of words, pictures, drawings, photographs, maps, cartoons and other formats. The evidential methodology requires such content to include

primary or secondary source materials. The Canadian Centre for the Centre for the Study of Historical Consciousness describes this method as the ability for learners to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take historical perspectives and understand the moral dimension of historical interpretations (Seixas, 2006; Peck & Seixas, 2008). Therefore, school learners need to master both modes of interrogation and knowledge of history, which can only be done by them ‘doing’ history and not simply by ‘learning’ history (Bertram, 2012). Content, or documentary analysis as the chosen methodology, is thus the ideal method to gauge the depth of conceptual knowledge or other types of knowledge presented in the books. It is a method of examining and analysing positions of words, meanings, concepts, themes, content knowledge and skills in documents (Martin, 2010, p. 29). There are minimal ethical considerations, due to the fact that textbooks are readily available public documents. The accessibility and portability of the texts, as opposed to arranging interviews with the authors, simplify the task from a logistic standpoint. Content analysis allows both (descriptive) qualitative and numerical data (use of substantive and procedural concepts) to be extracted. The integration of both data forms lends itself to overall analysis and interpretation. Gleaned trends, characteristics and quality of data contribute to the overall results. Inferences from the text can be made and verification through reanalysis is possible (Krippendorp, 2004 cited in Cohen et al., 2007). This lends itself to later issues of reliability and validity, with the proviso that the researcher is objective about analytic choices and methods. The method of content analysis enabled me to identify the presence of salient historical concepts in textbooks, to place meaning on their use in these books, and it allowed for a particular understanding to emerge out of the investigation.

4.3.4 Data generation methods

Content analysis is used to generate data from seven data sources. These sources are the textbooks of social sciences, all of which bridge three phases of the school history curriculum. While many of these books are available in the learner’s book and the teacher’s guide, the analysis here concerns only the learner’s book. Instead of naming each book in the analysis, I refer to them as Grade 3, Grade 4, Grade 5, Grade 6, Grade 7, Grade 8 and Grade 9. The references for each are provided in the reference section. The tools of analysis are constructed by integrating the ideas of Bertram, Martin, Maton, and Coffin, and the theories of Bernstein. The purpose of the tools is to get a nuanced sense of how the knowledge presented by the textbooks progresses by grade. In order to extract concepts or language and

skills that are specialised or generic, the data generation process was reduced into steps so that the analysis could proceed in manageable steps. Data was generated and analysed at three levels, each having different steps and contributing to a greater conception of historical understanding by the learner. The unit of analysis for each step is explained.

4.3.5 Data analysis methods

In order to obtain a fine-grained analysis, I selected one chapter from each textbook for analysis. To narrow the focus, a common thread that ran through all the topics or knowledge content of all the textbooks had to be located. For this purpose, I mapped all the topics from Grade 3 to Grade 9 and discovered that there was no common topic, although hidden in the presentation did seem to be a story of the past of South Africa, from the early inhabitants to democracy. This story appeared to begin from Grade 4, so it was essential to re-evaluate what to analyse in the Grade 3 text. The Grade 3 content was meagre, as the text presented just a page on the personal history of a child entitled ‘About me’, and so I added a later unit dealing with *How people lived long ago* to get a sense of how general history is conceived and taught in the Foundation Phase.

Progression, in a sense, seemed to be embedded in the language of the content, as it demonstrated a certain level of abstraction and complexity on the initial gaze. It also seemed to develop a sense of chronology by presenting centuries and their important events in history in chronological order, especially in the curriculum for Grades 7–9. The challenge was that all the topics in each grade were different in levels and depth. Even greater was the dilemma to ‘measure’ something as abstract as change. Language, then, became the chief indicator or the mediator of difference in abstraction and complexity. Therefore, words, sentences, and semantic analysis seemed the convenient vehicle to find the common thread.

What was significant about the topics was that they represented the most local, South African contextualised history in each grade amongst others. The implicit abstraction or ‘progression’ yielded certain linearity in the history chronology. This would necessitate an aggregation of the chapters based on the history of South Africa in chronological order. I located this common thread by purposively selecting the following chapters of the texts. Table 4.1 illustrates these choices.

Table 4.1 The seven text chapters selected for analysis

TOPIC	GRADE	TERM
1. About me (Unit 1) and how people lived long ago (Unit 12)	3	3
2. Local history	4	1
3. Hunter-gatherers and herders in South Africa	5	1
4. An African Kingdom long ago in southern Africa's Mapungubwe	6	1
5. The colonisation of the Cape in the 17th and 18th centuries	7	3
6. The Mineral Revolution in South Africa	8	2
7. Turning points in South African history: 1960, 1976, 1994	9	4

Data was analysed through three levels, each providing deeper discussion and insight towards explaining the content of the textbooks. These levels are further divided into very specific steps, each bringing under closer scrutiny what might point to 'progression' within the text. The levels first encompass a rich qualitative description (presented in Chapter Five), which is then followed by a mixed-mode analysis (qualitative and quantitative) (Chapters Six and Seven) as a multi-pronged tool to carve a deep passageway through the layers of the texts. Each level and its sub-parts provide small increments or categories of information which, when pieced together, attempt to explain the phenomenon of 'progression'. The sampling of the categories was purposive, due to its theoretical relevance and their relation to the phenomenon. The study encompasses an evaluation of the categories that supports 'progression' in textbooks and concerns itself with the implications for school history.

Figure 4.1 below shows how I intend to use the three levels of investigation. The findings from these three levels are separated into the chapters (Chapters Five, Six and Seven) that follow. Separating each level into a chapter, with its discussion and findings, makes the elaborate research design easier to follow. A more detailed explanation of the language of description for all the three levels is provided at the beginning of each chapter. The location of the language of description at these points is a key signal for the processes that unfold in the chapters. Figure 4.2 further deconstructs level three of the analysis into three different steps with clear objectives.

Research Design

Each textbook is analysed using the three listed levels. The diagram indicates how chapters are designated a particular purpose:

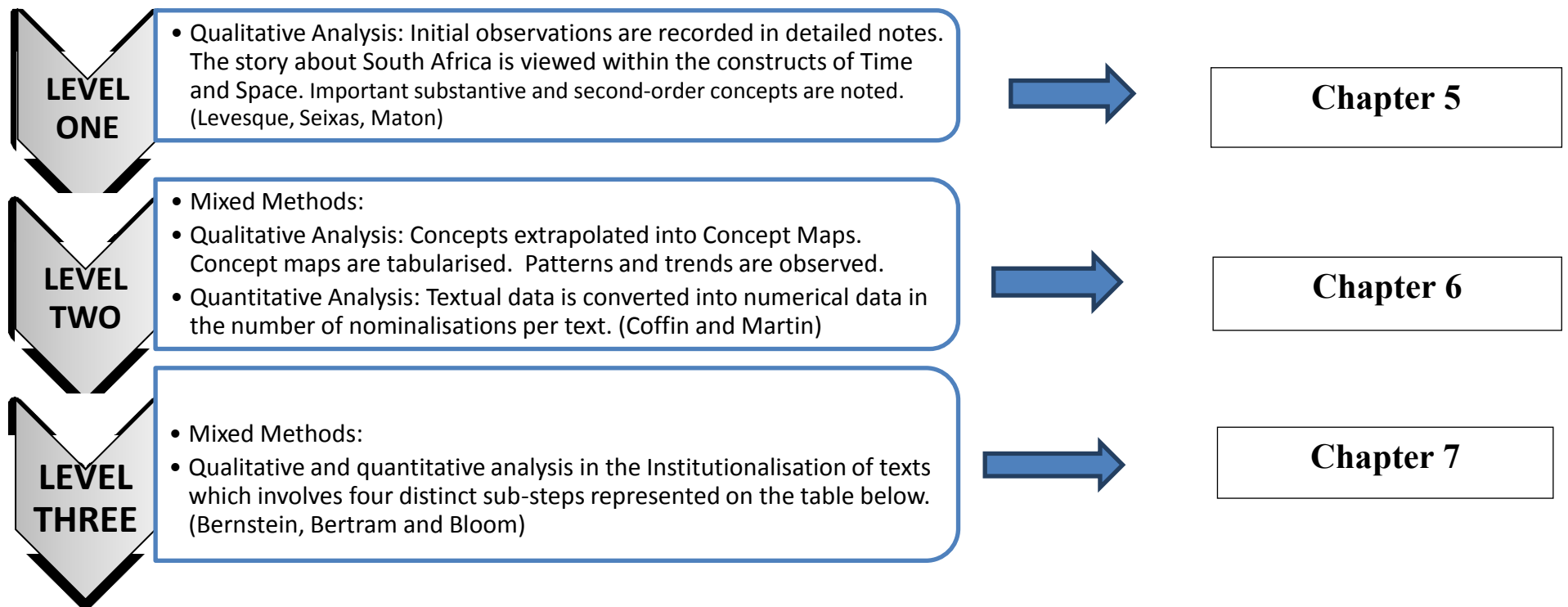


Figure 4.1 The research design (showing the levels of investigation)

Level Three

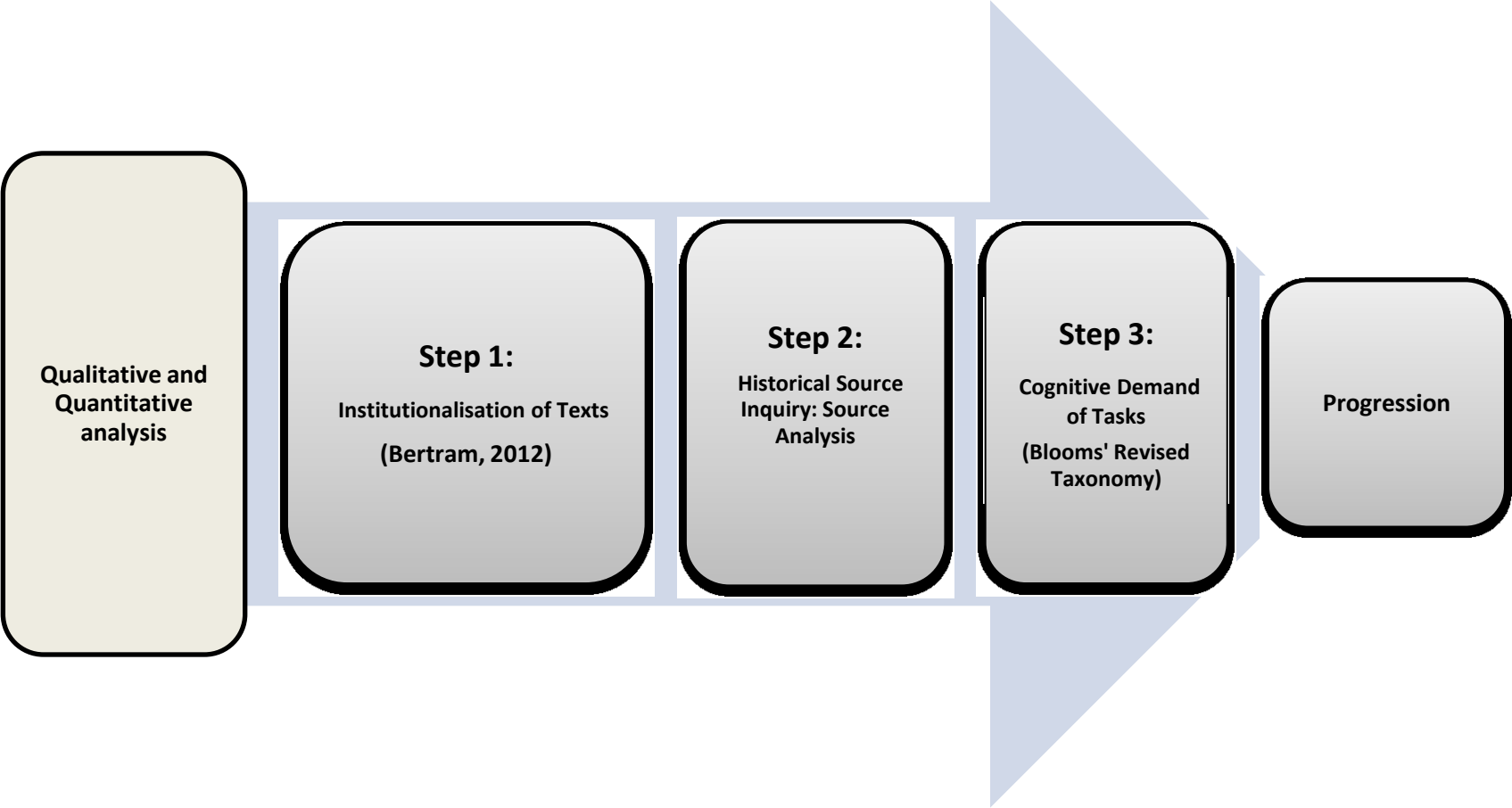


Figure 4.2 Level Three and its detailed steps

4.4 Limitations and reliability

This section of the chapter deals with the issues of validity and reliability in the methodology of the study. Amongst the various traditions of research are those that deal with researcher integrity and honesty, as well as the researcher's ability to respect research boundaries, parameters and limitations. That the researcher also acknowledges these limitations, also "empowers the reader to appreciate what constraints were imposed on the study and to understand the context in which the researcher claims are set" (Vithal & Jansen, 1997, p. 35).

Whilst the study is in the public domain and there are minimal ethical considerations, the object of the analysis is a range of published materials that are on the department of education's catalogue. As such, there are publishers and writers who produce and write these books with the intention to make a profit, as well as to maintain their own levels of integrity and honesty. In keeping with the requirements of research and the guidelines provided by the University of KwaZulu-Natal, the books forming the sample are acknowledged in the reference section of the thesis. I also explicitly state the limitations of the study as I see them and declare my intention not to harm the image of any particular person, publisher or publication. The study required a purposive selection of textbooks, and this was completed purely on the basis of their popularity in schools. This selection process constituted open and honest discussions with various educators of history, school principals and other managers of schools within the Pietermaritzburg and Durban area. The school at which I work chose to purchase these books in bulk for each learner and they were being used daily. The fact that the seven books were from two different publishers was unintentional. Since the form of knowledge in textbooks is under the lens, the choice had to be those that satisfied the curriculum and those that are in current use. The selection was made, guided by the highest level of ethics. The study sets out to analyse structures of knowledge in order to describe patterns of appearance, without any intention to measure one textbook against the other and so tarnish the reputation of any one producer of a text.

The selection of the seven texts, each one from a grade from Grades 3–9, as well as the selection of a chapter per text constitutes acts of aggregation which Weber (1990),

in Cohen, Manion and Morrison (2007), identifies as a compromise in reliability. While whole text analyses are desirable, they are time-consuming, as copious amounts of data are coded and generated. This study already engages three phases in the school curriculum, and any additional chapters would have lengthened the study and made the kind of analysis engaged with here, rather complex. The study consists of three levels of analysis. and the third level is further sub-divided into three distinct steps. It would have been challenging to engage with the number of layered tools and strict methodology had a larger sample been considered. Variation on the choices made would have compromised the rich analysis which grew out of the study. The purposive choice of the sample of the textbooks, the methodology and the streamlining of the analysis of one chapter per text, were necessary to build a coherent study. The Grade 3 text in the sample also had a single page showing the use of a timeline in “About me”, and so had to be supplemented by a later unit “How people lived long ago”. The selection of the theme under study, “About me” and “The history of South Africa”, may also concede a limitation to the study because history is about the world and South Africa. The choice, however, was an informed one due to the study’s context, location and relevance.

In accordance with department expectations and requirements, the information presented in the textbooks constitutes learning material and was not intended to be data in any research projects. Textbook information is significant because of the distinctive role it plays in the history classroom. I use textbook information to describe patterns in its presentation and submission of an interpretation to the phenomenon of progression. The tools used in the study are also put together purposively and selectively, so that the issue of subjectivity cannot be avoided. There are always choices to be made about the method, design and analysis, but this has to be completed honourably for the research to be meaningful.

That a researcher’s actions are influenced by their epistemological and ontological positions has been engaged with earlier in the chapter. Such a positioning influences the choice of content analysis as a methodology. Content analysis allowed access into the visuals of textbooks, so as to submit an interpretation of what exists as knowledge in textbooks. My research design was purposive in order to detail increments of information as each level of analysis produced them. The only way the choice of

instruments used here can be compromised, is if the classification of the text is inconsistent, either because of human error, coder variability (within coders and between coders) or ambiguity in coding rules. Words are innately ambiguous and the danger of different coders 'reading' different meanings into them, can arise. The researcher's 'language of description' made explicit in each level of analysis assists in guarding against potential misreading. Researcher coding and placement have to be meticulous and scrupulous and the data have to be checked so that errors do not arise. Furthermore, Wellington (2000, p. 31) refers to the degree to which a method or tool measures what it is supposed to measure. Here, there are various tools that operate in tandem. This is the reason why research must be available for replication and why the data acquired in any study, including this one, must be available and accessible to academics and potential researchers. The tools can also be utilised in other studies, individually or collectively, but the manner in which they are used is carefully described so that they can be mimicked as intended. Often studies of this nature suggest methodologies, but the way the analysis proceeds is not sufficiently described. This would constitute a limitation, as the effective use of tools is prohibited. This is an area of research that must receive attention.

The researcher is aware of the responsibility that accompanies a post-graduate study and there is an understanding of the implications of dishonesty. The principle of morality is one that guides the researcher not to misrepresent data and to conduct research using proper procedures so as to deliver an accurate report. Any deviations from appropriate conduct can also jeopardise future research (Cohen et al., 2007).

Researchers refer to a method of 'triangulation', where many techniques are used to get to the same truth. In an attempt to exhaust all possible ways to access the 'truth' about progression in historical thinking, various tools were combined for use in this study. What is presented is an elaborate methodology with very clear levels, and requires a detailed plan of action and ardent steps to adherence. Other researchers may consider alternate ways to access data for a similar topic. This was the way I chose to approach it. Knowledge making in critical realism, where this study is ontologically and epistemologically situated, acknowledges that the study is a reasonable attempt to deliver an interpretation of progression. It also acknowledges that some interpretations

are fallible, as new evidence and truths surface with greater time and investigation, but at the very least it offers information where it is scant.

Some researchers could argue that the sample size is restricted to seven graded textbooks, and that “The quality of a piece of research stands or falls not only by the appropriateness of methodology and instrumentation but also by the suitability of the sampling strategy that has been adopted” (Cohen et al., 2007, p. 101). I would argue that the results and findings are not generalizable to the larger corpus presented in the Catalogue of Textbooks. I also argue that time, expense and accessibility prevent the entire corpus from being used. More importantly, there is no evidence of any such comprehensive studies incorporating an entire population. It would be a challenge to obtain the entire population for any kind of deep-level analysis of this nature.

Textbooks are also physical objects that can be restudied, making visible the phenomenon under study. They are, therefore, accessible and in the public domain. As they are already written and interpreted by authors themselves, analysing them is a ‘double hermeneutic’ (Giddens, 1979 as cited by Cohen et al., 2007).

4.5 Conclusion

This chapter detailed the methodology employed in the study, first engaging with the epistemological and ontological assumptions which direct the choice of methodology and research design. A detailed account of the sampling strategy and the rationale behind this choice was then given. The data generation methods were described, and the theorists useful at each level of analysis were specified. Also clarified is how the arrangement of the thesis is influenced by the methodology. Finally, the limitations and reliability of the methodology employed are addressed.

CHAPTER 5

LEVEL ONE – QUALITATIVE ANALYSIS

5.1 Introduction

At this preliminary level, I undertake my first glance at each textbook chapter to formulate an overall impression of what each unit in the chapter is about and how each chapter develops. I discuss the appearance of information which cues the reader on the presentation of the information in text. To augment the visual sense, a scanned introductory page of each chapter that describes the chapter contents and objectives is included. I engage with how complexity could be indicated in the text, by interrogating the way in which time and space is used, the manner in which second-order concepts are used, as well as how new information or substantive concepts are featured. The categories of the ‘Time and Space’ to denote context or locality and its changes in the chapter are identified. Maton’s (2013) concepts of ‘semantic gravity’ and ‘semantic density’ are described in Chapter Three and form a useful language of description to understand the shift in context of knowledge (semantic gravity) or in meaning (semantic density). Also used, is the category of ‘second-order conceptual prompts’ to note any reference to Lévesque’s descriptions of them, and finally the category of ‘Overall Perceptions’ describes my gut-feeling on how the text advances in increasingly complex and abstract ways. The discussion of the concepts are an initial attempt to get a general sense of how these ‘appear’ on the surface without getting to the deeper, layered analysis of speciality of content or skill. This will be reserved for the second level, which delves into several layers to give a more nuanced view.

This study operationalises the word ‘concept’ and ‘concepts’ in different ways. According to Craig, Griesel and Witz (1994, p. 38), a concept is “an idea or notion resting on a rich and often complex history or thought”, expressing more than a word, indicating reflective thinking or grasping of classes of ideas together. They argue that ‘concepts’ are relative, sometimes applicable to a context that allows access to an understanding. Concepts vary in complexity, can be singular, but can be synthesized and inter-related with other ideas (*ibid.*). Complex concepts require specialist knowledge and methods of enquiry which have meaning that is not easily accessible from normal experience or by using ones senses. Some concepts are ‘technical lexis’ that, through language, is “typically

institutionalised learning” (Martin, 2007, p. 41 as cited by Christie & Martin, 2007). In disciplinary history, there has been discussion of substantive and procedural concepts. Procedural concepts have also been identified as second-order or meta-concepts, which have been clearly described by Lévesque (2008). With the area for defining a ‘concept’ being vast and transcending various disciplines, the way I choose to use it in this layer of analysis has to be clearly demarcated. For this section of the analysis I use the category ‘Concepts Extracted’ to identify history substantive knowledge or words, and the concepts that learners engage for the first time that are linked to the history content or topic under study. These concepts can be words in history, like ‘colony’, which can be context-related or can apply to many international or global contexts and definitions. The concept of ‘colony’ is a word which becomes a complex ‘concept,’ because various ideas are synthesised into the word and various separate contexts are inter-related or held together by the definition. In this level of analysis, I extract substantive knowledge or learning content that appears as words or concepts dealing with new ideas, specific people, places, events, dates, times and objects. The rationale behind this extraction is to note what kinds of data are generated and if there is any kind of sequence or pattern that can be observed from their generation. People who are named in the text, but feature as an ‘accessory’ or ‘talking head’ are not included if they are used in a generic sense or they do not add to the history knowledge content. All dates, historical figures, places and events are included, as they point to time, space, specific participants and location of history.

5.2 Links with theory

This section deals with the voice of theory and how it affects my choice of methodology. I engage with Seixas (2006) and Maton (2013) and their individual theories to direct the analysis. A qualitative survey, initially, is said to give rich nuanced impressions of what is in the text. This qualitative view includes an analysis of the overall engagement with the broader second-order concepts such as cause and consequence, use of primary source evidence, historical significance, change and continuity and taking a historical or moral perspective. The results are tabularised to gain a sense of what in the text signals the presence of these second-order concepts of history, either in the way the content is presented or in the content itself, across the grades. There are various models presenting criteria for identifying and analysing second-order concepts. Seixas & Morton (2013)

provide essential questions that are accompanied by specific instructional strategies for working with each concept and use examples from history. However, for my study, I use a more concise instrument presented by Seixas (2006) as a tool to describe historical thinking. Using this tool, I analysed each textbook to find out how each of the broad second-order concepts were presented in each chapter under study. In Chapter 5, I tabularise the strengths of the judgements as strong, weak or absent, followed by descriptions of how the judgements were made. I use examples from the textbooks to portray this. Then in Chapter 8, I tabularise the data again to show a summary of the data generated from all the textbooks so that I can get a sense of how each textbook configures the second-order concepts across the grades. The following are the procedural concepts presented by Seixas (2006, cited in Martin, 2012, p. 20) which will be used to analyse the textbooks:

- **Establish historical significance:** This requires students to establish what is historically significant based on two criteria: events that have resulted in change and those that are revealing about enduring or emerging issues in history and contemporary life.
- **Use primary source evidence:** This requires students to construct knowledge about the past by finding, selecting, interpreting and contextualising primary sources, not only in terms of information, but sources must also be read to determine their authorship, purpose, context and reliability to construct an original account of a historical event.
- **Identify continuity and change:** This provides the means to organise the complexity of historical phenomena by identifying and explaining the processes and rate of historical change and making judgements about continuity.
- **Analyse cause and consequence:** This requires analysis of the agency that individuals and groups play in promoting, shaping, resisting change over long and short periods of time and multiple influences that create change and their intended consequences.

- **Take historical perspectives:** This entails understanding the different political, social, economic and cultural contexts that shaped people's lives and their actions, however, without students' imposition of presentism on historical phenomena.
- **Understand the moral dimension of historical interpretation:** This provides the opportunity to learn from the past and provides insights into moral issues that affect, implicitly and explicitly, the present by attempting to understand perspectives and contexts of historical agents.

I then use Shifts in Semantic Density (Table 3.1) and Shifts in Semantic Gravity (Table 3.2) (Maton, 2013) as a way to describe knowledge in the textbooks. These concepts have been defined and reworked into tables which function as another language for the description of knowledge in the sampled textbooks. They can be used to describe knowledge as semantically strong or weak, which allows a coding of language in terms of the meaning it condenses. These tables are also used to describe knowledge which is context-dependent (contextualised) or context-independent (decontextualised) knowledge.

5.3 A detailed first impression of textbooks

5.3.1 Text One: Grade 3

Boucher, S., Brown, J., Mostert, J., Hortop, S., Kelly, S., McLernan, H., Moodley, R., & Mcaba, S. (2011). Shuter & Shooter, *Top Class Life Skills*, Grade 3, Learner's Book, Shuter & Shooter, Pietermaritzburg.

Number of pages: 5

Topic 1: Unit 1: About me (p. 1)

Unit 12: How people lived long ago (pp, 49–52)

Figure 5.1 below shows a scan of Text One's introductory page for Unit 1: About Me

Unit 1 About Me





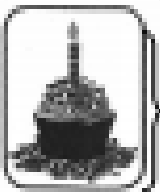

WEEK 1 Activity 3

What is a timeline? } T1

Rishon's history } T2

A timeline enables you to see important information about your past life, to recognise achievements you have made and helps you plan what you would like to do in the future. } T3

Read the story of Rishon's history.

- 2011 baby sister was born  P1
- 2010 family moved to a new home  P2
- 2009 started going to crèche  P3
- 2008 fell and broke his arm  P4
- 2006 celebrated first birthday  P5
- 2005 born in Umhlali  P6

Read the events of Rishon's history. } T1

Do you see how the timeline tells a story? } T2

Unit 1: About me 1

Figure 5.1 A scan of Text One: Unit 1 (p. 1)

There is no separate subject for history in the Foundation Phase. The focus, in this phase, is on mathematics, English (or home language) and life skills. Within life skills there is the inclusion of simple or introductory history. The Grade 3 learner's textbook chosen for

analysis is linked with a workbook and the Teacher's Resource Book which directs the activities.

The Grade 3 learner's book takes on the appearance of a general reading book. It is significantly thinner than all the other textbooks in the sample and has a more 'fun' appearance. This 'fun' aspect is presented in the attractive, colourful and glossy cover and the incorporation of lively pictures in various primary colours. The presentation of people in colourful and realistic photographs, cartoon images and pictures is aimed at arousing the interest of learners at this young age. It is suitably levelled for a Grade 3 learner, as it has visuals that the learners would enjoy. The first page of the book is shown in the scan from Text One and appropriately shows smiling, happy children, one of which appears to be reading and learning. There are pictures of the outside and inside of a home with a colourful cupcake creating a setting for a party and a happy start to learning. These are images that contextualise learning, as the learner can identify these things from their own experience. The content in this textbook is significantly less complex than others in the sample. This is evident in the large print and fewer pages dedicated to the study of history. The language appears very concrete, simple and everyday. The design is commensurate with the learner's ability, that is, what a learner of the age category 8–9 years would enjoy. Even though the presentations are simple, they are a source of stimulating discussion and knowledge about people.

The sections under study are written in the English language, in large black and bold script while some headings and sub-headings are presented in different colours. The language is couched in smaller or shorter words, although there are some words which require explanation. For example, the word 'achievements' would require full explanation. However, there is no dialogue box or word bank which could provide explanation for the learners. This is not to say that it would not be easy for these learners to use the book by themselves and without supervision.

The first page in Unit 1, "About me", is dedicated to a timeline on a child named Rishon and learners are merely asked to read the events of the child's life and to 'see' how a timeline tells a story. Learners are not required to do any written task. It would have been a better option to develop the idea of timeline construction by allowing learners to practically craft their own personal history in a timeline. This would give them a sense of

how timelines are useful in telling their own personal history. They could have been asked to bring in their own birth certificates, or copies thereof, as primary source documentation to show how they arrived at their dates of birth. They could present the documents to their peers as ‘evidence’ of their birth. Many learners at this stage are still becoming acquainted with the understanding of having a personal date that marks their own personal identity. It is an understanding that a culture develops and it is legalised as an official document.

The textbook activity, however, has very little to engage learners in any specialised skills of history, which could have been accomplished using the methods described earlier. It does introduce them to the concept of a ‘timeline’ and how significant events in one’s personal history can tell a story. The development phase of a biography is being scaffolded here, even though it is in an elementary sense. Children may not be actually writing about Rishon, but they are formulating how a ‘personal’ story (early-biography) can be told. Furthermore, the idea is put forward of how these dates are significant to the individual being studied. Learners are introduced to the idea of how the ‘history’ of someone can be told, and here it is Rishon. They also learn how relevant and important dates from a personal history can be pegged onto a timeline. The key concept learned would be ‘time’ and it is possible to arrange which event comes first: Rishon’s birth or his attendance at crèche. The use of a timeline here is very significant, as it introduces a learner to a very important skill in history of organising events along a timeline, which is ‘chronology’ in history. The years in the timeline: 2005, 2006, 2008, 2009, 2010 and 2011 are arranged chronologically along it and learners are able to recognise the events that accompany each of those dates that were significant to Rishon.

Unit 1: About me

Concepts extracted:

- Timeline, history, achievements, story, Rishon, Umhlali, crèche

Time and space:

- When reading the timeline on Rishon’s history, the learners are shown how development takes place from birth to the present age. The learners are about the

same age as Rishon, so the years shown in the timeline are very close to their own and they are able to identify with the life stages and experiences of the protagonist. It would be the responsibility of the teacher to draw the learner into a comparison using their own personal history. The early life history of Rishon is presented to the learners so that they can also identify key events which mark his milestones. The milestones and experiences are, again, very close to the learners' own (birth date, first year at crèche), so the knowledge is contextualised and in their own time zone. They are not told about the history of a learner who lived a long time ago, but the story is based in the present time. The timeline also shows that the passage of time, and change which accompanies it at this elementary level. Had learners been required to construct their own timeline, they would have had to consult their parents/guardians on their significant dates and location at each stage or year marked on the timeline. Learning would have been more concrete and tangible by learners working with own birth certificates and years.

- This section thus sets the time in the present and the space close to the learner's own. In Maton's (2013) terms, this elementary knowledge would constitute strongly contextualised knowledge (strong semantic gravity). Meaning is also simple and clear, which would make the density of the knowledge weak.

Procedural concepts prompts

Table 5.1 Text One: Procedural concept prompts for Unit 1

Procedural Concepts	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance	√		
Use primary source evidence	√		
Identify continuity and change		√	
Analyse cause and consequence		√	
Take historical perspective			√
Understand moral dimension of historical interpretation			√

Establish historical significance:

There is weak evidence in the chapter of the 'Establish historical significance' concept because there is no historical event to mention. There also also no emerging or enduring issues to study in the chapter 'About me'. What is presented is the understanding of how a timeline is used to present the history of a boy named Rishon. 'Emerging issues in contemporary life' suggested by Seixas (2006) draws minimal significance to the learner's own personal life by comparing how the learner's own history can be compared to that of Rishon. The time under study is similar to the learner's own personal history as it features years of birth and growth that are common to both the learner and Rishon, perhaps to draw similarities between personal histories.

Use primary source evidence:

The learner is required to use the pictures and photographs within the timeline presented to them to construct a story of Rishon. These are weak sources of evidence because they do not offer perspectives of an historical events but rather a personal event in the history of a contemporary student. These photographs are generic sources of information rather than primary sources. They are however used to build a history of someone through the use of a time-line. Simple chronologication conventions are introduced.

Identify continuity and change:

Pupils are asked to read the events of Rishon's history and 'see' how the timeline tells a story. Learners will clearly identify what had changed and what has continued to remain the same in Rishon's life. There is strong evidence of growth and changes to the learner's life albeit in his personal history. This benchmark was indicated even though it is in a smaller space and context. Learners are nevertheless acquiring knowledge about what constitutes change and what remains the same.

Analyse cause and consequence:

From the time-line and the information that supports it, there is strong evidence of how changes can bring about consequences in the short period of the learner's life: a new home, a crèche, how a fall broke his arm, his birthday and his place of birth. This understanding is very much on a simpler understanding in order to scaffold the idea of cause and consequence for the learner in the foundation phase. It is the entry point where

simple definitions and understandings are built. This, however, can in no way be equivalent to the cause and consequence of a historical event such as the slave trade where there are significant causes and consequences that have multiple influences to create change.

Take a historical perspective:

Learners are not required to take any particular perspective but to rather engage with information in simple ways.

Understand the moral dimension of historical interpretation:

There is no information in the text that provides insight into moral issues. The table shown above therefore indicates that there is no evidence to understand the moral dimension of historical interpretation.

Figure 5.2 below shows a scan of Text One's introductory page for Unit 12: How people lived long ago.


WEEK 1
Activity 2

Unit 12 How people lived long ago


Clothes from the past } H3

Look at the pictures on this page and compare the clothing worn in the past with clothing worn today. See if you can match these labels to each of the pictures. } T3


<p>Then</p> <p>A family picture taken long ago</p> <p>Enoch Sontonga</p> <p>A woman at the beginning of the 20th Century</p>	<p>Now</p> <p>A family picture taken recently</p> <p>Young South African musicians</p> <p>A woman at the beginning of the 21st Century</p>
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P7




P8




P8



P10



P11



P12

Unit 12: How people lived long ago 49

Figure 5.2 Text One: Scan of Unit 12 (p. 49)

Within the same unit, there are four sections led with the sub-headings: Clothes from the past; Things from the past; Travel back in time; Records of the past.

In this particular text, the section on ‘How people lived long ago’ (Unit 12) is perhaps a stronger start for the subject of history. Pupils are asked to look at, compare and label photographs of people in their colourful, modern clothing and compare them with pictures of people who are dressed in old-fashioned clothing and appear in black and white photographs. This activity is represented in Figure 5.2. In the section on ‘Things from the past’ learners are then asked to look at old or outdated objects in pictures and photographs (an old-fashioned manual typewriter, a Moraboraba board game, a gramophone, a hand-operated sewing machine, amongst others). Learners are asked to identify the objects and to match them with labels provided.

In the section on ‘Travel back in time’ the teacher is then supposed to tell a story of Paul Maraba from the Teachers Resource Book, and pupils are asked to look at old pictures of transport to identify which one Maraba wanted to have when he was a young boy. Paul Maraba is not a significant historical figure in South Africa, but he forms the protagonist in the story being told to the Grade 3 learners. The story is identified as one told by an older person in the community. It is about a character named Paul Maraba who was raised by his granny in a rural area after his parents died. Learners are told about how they planted mealie fields and how Paul went to school 10 km away on horseback. The story also describes how Paul loved cars and how he had wanted to own a Volkswagen Beetle when he grew up, until he saw a Ferrari.

The final section ‘Records of the past’ introduces the learner to an 1889 painting by A. H. Barret, showing the first public railway from the Point to Durban. The harbour of Durban can be seen in the background of the railway. A photo of the Durban Harbour in more recent times is presented below it so that learners are able to compare forms of transport and the types of clothing worn by people in the different times shown in the pictures. Learners are then asked to describe how the harbour has changed.

Concepts extracted:

- past, long ago, Enoch Sontonga, 20th Century, 21st Century, typewriter, tape cassette, record player, rag doll, gramophone, sewing machine, Moraboraba (800 year old traditional game), first railway in 1889, historian, first steam train in 1860, Point Station, Russel, Zulu-speaking spectators, Paul Maraba, A. H. Barret, Point

to Durban railway, harbour, harbour development, beast, vapour, rhinoceros, horn, wagon, transport, wood logs.

Time and space:

- Pupils are asked to look at pictures of the past and to comment on how people have changed their style of clothing. Photographs of people in the past and the present allow learners to be able to make this comparison. The older types of clothing are representative of the past. The time is out of the immediate context of the learners, although the text does not make it clear in which time these clothes are worn. Concepts like 20th and 21st century are used with no explanation of how centuries operate at this foundational level. The methods of transportation and how photography has advanced to reflect modernisation in the images is reflective of how time has resulted in changes in clothing, transport and photography. Whilst this chapter uses the years 1860 and 1889, the teacher would have to explain the years, how they are arranged chronologically and how this is relevant to the information presented. There is no explanation about who Enoch Santonga is. The pictures of old objects, the story about Maraba, the old vehicles and the history of the first public railway takes the learner out of their immediate context to a time in the past, but it is within their own national borders. This section, thus, sets the time in the past and the space away from the learner's own. In Maton's (2013) terms, this knowledge would display movement away from the local space of the learner and weaker semantic gravity (decontextualisation). The movement out of local context also brings in concepts like 'century' and dates like 1860, showing a shift in time, to understand a new context and space and people and development. Meaning is not easily accessed and this would make the knowledge semantically dense (increasing semantic density).

Procedural concept prompts

Table 5.2 Text One: Procedural concept prompts for Unit 12

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance	√		
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence			√
Take historical perspective			√
Understand moral dimension of historical interpretation			√

Establish historical significance:

Although there is no particular historical event under study, there are numerous signals that require a coding of weak evidence in the concept of establishing historical significance. Learners are referred to the dates 1889 and 1860 which requires that they know why these are historically significant. However not much is expected from them in writing about issues relating to these dates. Learners are also asked if they knew that the game of ‘Moraboraba’ was played 800 years ago. They are thus nudged towards understanding why this game was played.

Use primary source evidence:

Learners engage with primary sources such as photographs of past people, old style of clothing, older musical instruments and objects like antique sewing machines and a unicycle, an old television, a sewing machine, typewriter, cassette and camera. Older forms of transport are shown so that learners can construct knowledge about the past. The story about Paul Maraba is supported by pictures of old cars and learners are required to identify the car he wanted when he was younger. Learners are required to engage with the sub-heading ‘Records of the past’ which specifically deals with a picture of a painting, taken to be produced at the time when the harbour of Durban was not developed. Learners are required to engage with the primary source to construct an understanding of the old harbour. Such engagement allows the coding of the second-order concept to be strongly represented in this chapter. There are not many examples but the fact that the concept is

engaged with, is important for the development of historical thinking in the foundation phase. This may be attributed to the fact that there is lesser history content knowledge than that which appears in higher grades.

Identify continuity and change:

The appearance of the old harbour in the primary source of the painting alongside a photograph of the same harbour many years later is clearly an attempt to portray continuity and change which learners would easily pick up on without much prodding. Learners are then asked to describe how the harbour has changed. They would have to compare and contrast the two pictures and explain which of the factors continue and which do not. This concept thus receives a strong presence in this chapter, in spite of its lesser history content knowledge than higher grades.

Analyse cause and consequence:

Since there is no particular historical event under study, there is no evidence of what caused any change, even in the painting or in the picture of the harbour.

Take historical perspectives:

Learners are not required to take any perspective on issues. They are engaged in very simple tasks at the foundation level of history. Elementary history is thus presented simply with basic concepts and knowledge. This is perhaps because this particular second-order concept has a certain complexity attached to it. Younger learners may not be entirely ready either in development or in writing to present their perspectives.

Understand the moral dimension of historical interpretation:

Learners are also not required to engage in any issue which is related to the moral dimension. There is therefore no evidence of learners being required to read, write or engage with issues of moral interpretations. For this reason, the 'no evidence' box is ticked.

Overall perceptions:

At the very basic entry point to the discipline, there is a development of appreciation for the past. Understanding the value of what happened in the past, and how the present reflects the improvement on the past, has to be explained in simple terms for the learner.

For example, the shift in transport and the advancement in photography can be seen, but there has to be explanation. If this text is used by the learner in isolation, without the supervision of the teacher, the necessary ‘unpacking’ of the knowledge would not be done. When knowledge becomes increasingly or semantically dense, and moves out of the context of the learner, then much of what is presented in the text would not be understood. Maton holds that decontextualised knowledge must be contextualised for the learners by explanation so that interpretation is clear (Maton, 2013). This text conveys the passage of time in its images, but the idea of time passage needs to be sufficiently explained for the learner so that they can make sense of it.

This chapter aims to create an appreciation for objects and for the maintenance, repair and preservation of things from the past to gain historical understanding. The chapter includes the statement: “Some of these toys are still played with today” (Grade 3 textbook, p. 50). The unit incorporates a painting by Barret, which is an important record of the past. This is also an introduction to a primary source, although there is insufficient provenance around the painting. The name of the artist and the year it was constructed is all the information given by the text, so learners may not know where this primary source was obtained and why it was created. Perhaps, for this initial year of study, it may not be necessary to engage with such details, but later when issues of credibility arise, these will be critical details to note. Although the source is not labelled as a ‘source’, it is nevertheless an effective way of showing the learners the passage of time by simply including a painting of the harbour as it appears in the past and a photograph of the harbour in recent times. The pictures of past and present teach learners to compare and contrast, and so scaffold the concepts of change and continuity.

The fact that the teacher would have to explain what is implied in the text means that the text has not been ‘considerate’ to the learners experience of the content. A considerate text is designed to maximize the possibility for a reader to gain information and establish relationships among concepts (Anderson & Ambruster, 1984, cited in Leinhardt et al., p. 3). This text assumes that learners have prior knowledge of chronology in time. For example, it is stated that the Moraboraba, as a traditional game, was played 800 years ago. This game cannot simply be mentioned to learners. Something more about the objective of the game and how it was played should have been mentioned so that learners can identify it and possibly play it. The text does not clarify who played the game.

Furthermore, the text takes it for granted that learners who are 8 or 9 years old have seen an old manual typewriter and gramophone. Depending on what their previous experience or earlier exposure to this topic has been from other early lessons, and from reading in school and at home, they would be able to add to the discussion. In addition, the numbering of centuries, as it appears in the text, is insufficient for the learner. This concept has to be thoroughly explained or they would not be able to visualise how things have changed over centuries. The concept of ‘century’ and ‘hundred’ must also be understood. In a similar vein, progression, here, would involve the understanding of a ‘decade’ first, then that of a century. Mathematically, this concept may not have been embraced. Therefore, the teacher could well have to draw another timeline to show how centuries progress. Some progression is reflected in the use of new concepts and in the new contexts introduced. Utilisation of records such as paintings and visual images in photography and drawings are important sources of information. Learners are expected to work with important records and evidence from the past to construct it. By using the painting as a start, there is evidence that some historical sources are being incorporated in the textbooks.

5.3.2 Text Two: Grade 4

Ranby, P. (2012a). *Solutions for all. Social Sciences. Grade 4. Learner’s Book.* Macmillan: South Africa.

Topic 2: Local history

Number of pages: 16

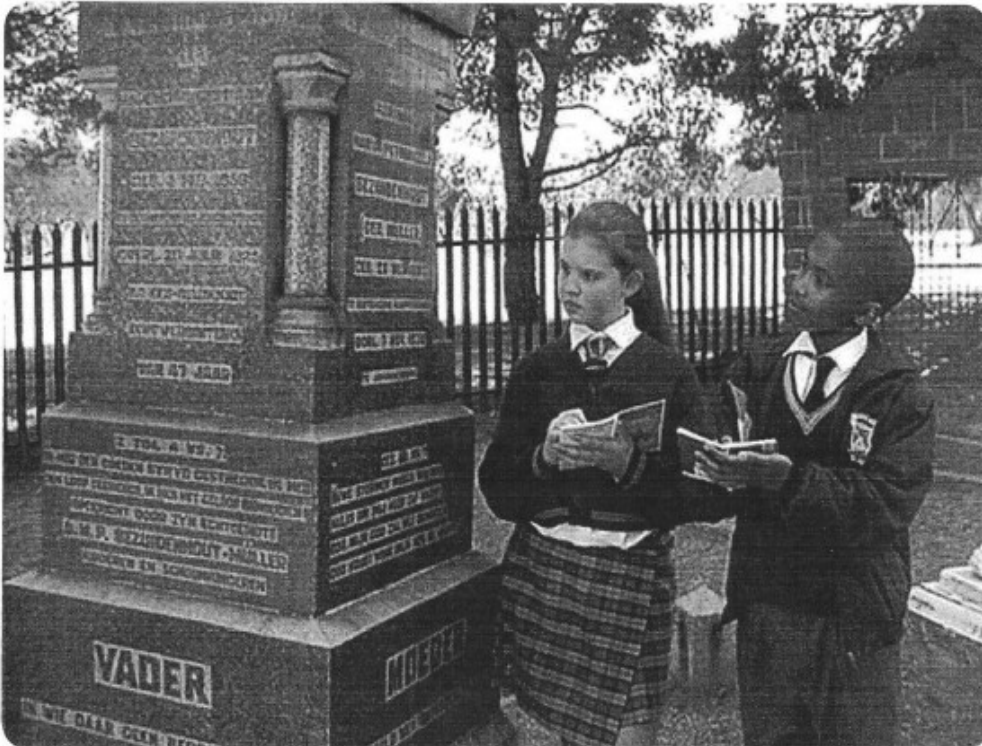
Page number of scan: p. 23

Topic 2

Local history

What is this topic about?

- How we find out about the present in a local area
- How we find out about the history of a local area
- How to do a project on the local area



Look at the picture

- What is the object in the photo?
- What do we call places like this? Where do we find places like this?
- What do you think the children are doing?
- Have you been to a place like this?
- What can you learn from these places?

Figure 5.3 A scan of Text Two: Introductory page 23

This topic is divided into three units: a project, topic summary and formal assessment tasks. The components of analysis will be a thread through all of these sub-divisions to

collectively evaluate the progression in this chapter and how it relates to the progression along the grade continuum.

The chapter has a set of directional questions which the learner should be able to answer at the end of the topic. This, as well as the topic summary, does not form part of the analysis. The chapter commences with a picture of learners who are standing near an object that looks like a tombstone and they are recording field notes about their observations.

Unit 1: How we find out about the present in a local area

Sub-heading: Information from pictures, writing, people and objects

Unit 2: How we find out about the history of a local area

Unit 3: Finding out about the local area for a history project

Unit 1: How we find out about the present in a local area

This unit presents an introduction which depicts pictures, writing, people and objects, all contributing to how we can find out about the present in a local area. The objective of the unit is to get learners to draw conclusions about the content and practices of the people in the picture, which can be elicited from the written sources they consult. The picture shows a family in their living room, three members of which are engaged in some activity. The idea that the family exists in the present is understood from the modern furniture and car featured in the picture. The flatscreen television, the family portrait, the wall calendar, the newspaper (which is being read by the man in the picture), the photo album on the table, the unopened mail on the side table, the reading book or Bible on the coffee table, and the document in the older woman's (possibly the granny of the young child sitting next to her) hand, labelled as a 'report', are numbered. The picture functions as a source of information for the learner to construct information about the family and its habits. The objects in the picture function as a source of information about the family interests and lifestyle. The learners acquire understanding of how objects in the immediate or local environment can be used to describe people, what is important to them and how they live.

The second section of this unit deals with defining the local area as the area 'around which you live' (p. 25). It gives learners details of how a local area includes their home, school, bus stops, taxi ranks, places of worship, shops and friends' houses. It also directs

learners on how to access information about their local area from pictures, writing, people and objects, using examples of different pictures to show how this can be done. For example, a picture of rock paintings is shown alongside the writing so that learners can infer meaning. We can know about the San from the paintings they created on walls of caves. The picture is not labelled and the information in the picture is not explained. It is the teacher who would have to make sense of this. Other pictures follow this example. There is also a talking head accompanied by a speech bubble which includes information on how we can find out about the local area from talking and listening to people.

Unit 2: How we find out about the history of a local area

The second unit qualifies ‘history’ as the ‘time before the present’ in the information box at the start of the unit, which is rather confusing for a learner in Grade 4. The past is also labelled as ‘100 years ago’, which further adds to the learner’s confusion. This is an inaccurate representation of the past at this introductory phase. A timeline is presented, conveying points of the past, present and future, but without reference to any specific event. Here, there is no description of how years connect to centuries. This would have been an ideal place to commence a description of the acronyms of AD and BCE and how the present years are represented. Yet, inaccurate information does little to advance or develop a strong sense of time and chronology in this text.

The second section of this unit creates a scene in a classroom where learners are preparing for a history project. Four photographs are used, showing children from different races working with books and engaging in group discussion. Learners appear in school uniform and the photographs appear to be shot in a modern school environment. Each picture has a caption identifying the children by their names and what they appear to be saying to each other. Here, there are no talking heads or speech bubbles. The captions of the pictures indicate that they are discussing how information can be collected from pictures, objects, writing and interviews. The information presented here is set to tell the learner how to access information for their forthcoming project, and what the sources of information would be.

Unit 3: Finding out about the local area for a history project

The third unit continues to clarify for the learner how information in a photograph can be extracted. It also demonstrates by the activities provided how writing can be interpreted

and how interviews with people should be conducted and the kinds of questions that can be asked. The idea of gleaning information from objects is also exemplified by showing within the activity that information can be sourced from objects. For example, the road called Enoch Sontonga Avenue is dedicated to the writer of the South African National Anthem. The rest of the unit is used to describe the brief and summarised description of the anthem without elaborating on its significance.

Concepts extracted:

- objects, local area, project, places of worship, history, dates, graveyard, old pictures, gravestones, Zulu, Pedi, Afrikaners, 1910, 1917, 1972, Avenue, memorial, museum, past, present, future, timeline, Kensington, Johannesburg, Bezuidenhout Park, interview, Enoch Santonga Avenue, National Anthem.

(Note that there are a number of other names mentioned in this chapter such as Desmond and Kajal, but their use is generic. They are used in pictures, like accessories and talking heads, to comment on an aspect. They do not add to the history content itself. They were, therefore, excluded. Unlike Text One, where Paul Maraba is also not a historical figure but the story about him adds to the learner's knowledge on transport).

Time and space:

- The title of “Local history” provides a high degree of contextualisation for the learners using the textbook. The idea of a project in their local area allows them to access information about their own environment which is close and personal to them. The space is therefore the learner's local area and the time is the present. Learners will also use the skills of a historian to collect information relevant to their topics. They are located in their local environment and are describing their environment in relation to the present, but also denoting what has transpired in the environment over the years in the passage of time. Involving the learner in their immediate environment enables them to work like ‘detectives’, ‘investigators’ and ‘researchers’ so that they can evaluate and draw conclusions. They can record, interpret and formulate conclusions about their own experience and adopt a personal position or locality. This chapter does not present any special event out of a specific period to study, but instead focuses on young learners' ability to use

information around them to learn about their environment. There is also inaccurate representation of the past in ‘100 years’, and the past is not adequately described in terms of the timeline. This depicts poor understanding of chronology, as there is no content in this chapter to advance this. What is significantly emphasised is the method on how to learn about one’s local environment. The Grade 3 text situates learning in the immediate context of the learner, and then incorporates some distance, showing an extension to the space being studied.

- The information presented in this text constitutes knowledge that is strongly contextualised for the learner, which constitutes strong semantic gravity. The learner is still in a local space and the semantic density is weak, as the language and content of history is easily accessible. The words or concepts used are more common sense and everyday rather than being dense or specialised.

Procedural concept prompts

Table 5.3 Text Two: Procedural concept prompts

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance			√
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence			√
Take historical perspective		√	
Understand moral dimension of historical interpretation			√

Establish historical significance:

There is no historical event under study in this chapter. Learners are specifically engaged in understanding the present local environment and how it can be possible to learn about the local environment from the objects around it. There is thus no evidence in text of historical events that have resulted in change.

Use primary source evidence:

Whilst there is no historical event to consider, learners are introduced to the processes of how the local environment can be used to collect information about the past. Learners are specifically taught through the text to find, select and interpret sources. They are however not engaged on issues of reliability. There is an entire range of sources that are presented but they are more generic sources of information than primary. Since the entire chapter is dedicated to the process of how sources can be accessed and used, strong evidence is recognised.

Identify continuity and change:

Learners are presented with an interview with Mr. Maluleka who worked at their school for many years. Learners have to use Mr. Maluleka's responses on the interview to indicate what has changed and remained the same in the school. This is strong evidence of continuity and change. Learners are also asked to tabulate the changes so that they may make comment on: the children that went to the school, transport through time and games that were played over time at the school.

Analyse cause and consequence:

There are no particular historical events under study and no consequences that arise over short or long periods of time. There is thus no coding for this particular second order concept.

Take historical perspectives:

In the text, learners are asked who Enoch Sontonga was and how people have remembered him in Johannesburg. Learners are then asked why we have different languages in our National Anthem. Enoch Sontonga is the writer for part of the South African National Anthem and when learners engage with this question they do so recognising the different political and cultural contexts that shaped people's lives. There is strong evidence of taking a historical perspective in this particular example.

Understand the moral dimension of historical interpretation:

In this chapter, there are no examples of learners being asked to engage in any moral interpretation.

Overall perceptions:

The chapter is strongly contextualised in the local environment of the learner. Very few substantive historical concepts arise, even though the procedures are quite strong. The concepts that arise are very general and can arise in other learning areas, so the discourse is not strongly historical in terms of the language of the text. However, the procedural history develops, with learners consulting historical writing, people and objects to get information. The skills of a historian are foregrounded, as learners are engaged on how to utilise original sources of information: objects, writing, interviews, and pictures. Activities given show how photographs can provide information by examination of its contents: who and how many people, why, the objective of the photographer, the motivation of the people in the picture, the differences between the people, and the reasons for difference. In organising a museum display for a classroom display, learners are required to examine their local area for information while consulting pictures, writing, people and objects. In their project, learners' construction of a museum will require that they work like historians. They will have to take photographs, collect objects, interview people and consult written and visual sources in order to construct the museum.

5.3.3 Text Three: Grade 5

Ranby, P. (2012b). *Solutions for all. Social Sciences. Grade 5. Learner's Book. Macmillan: South Africa.*

Number of pages: 20

Page number of scan: p. 25

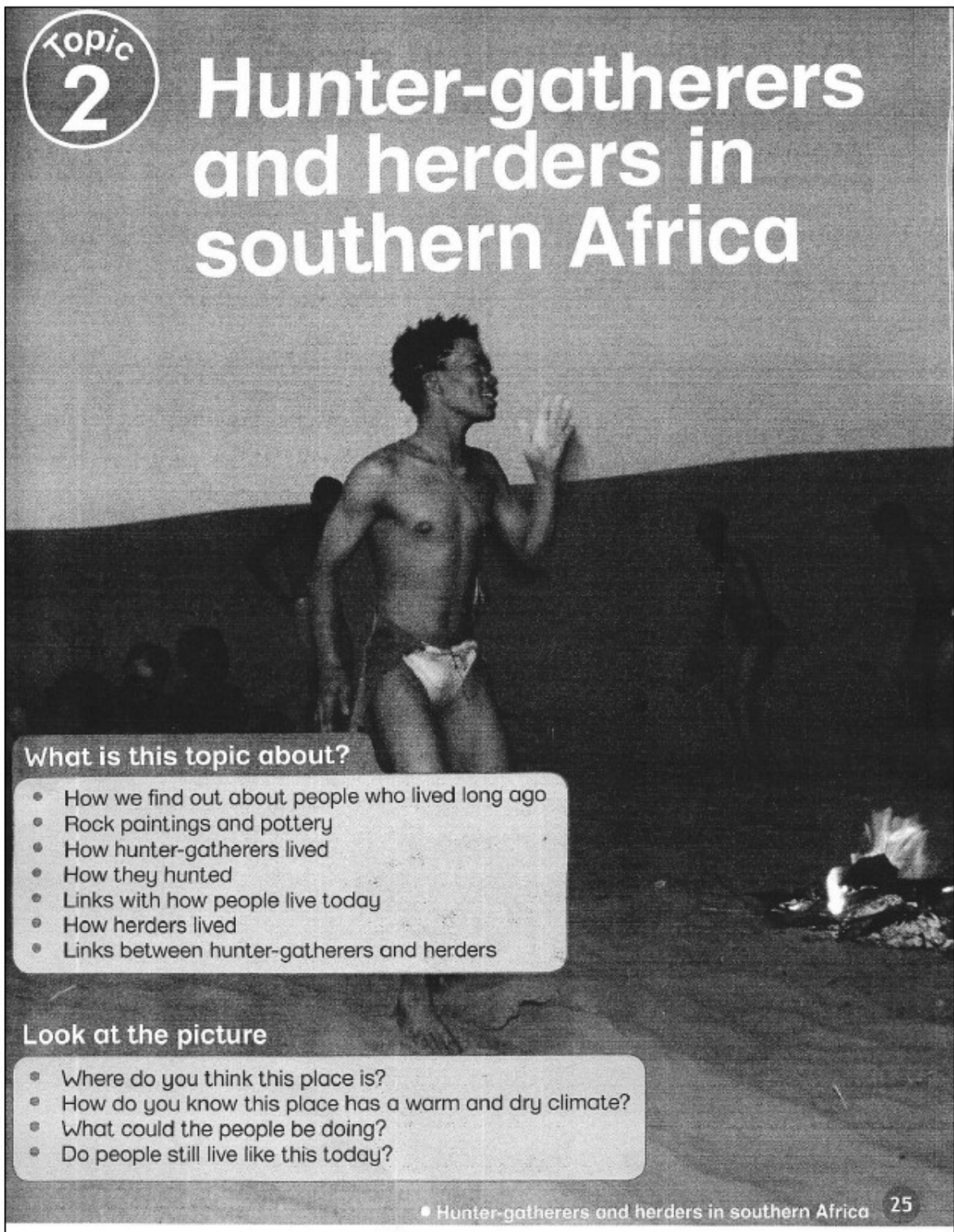
Topic 3: Hunter-gatherers and herders in southern Africa

The topic is divided into three units:

Unit 1: How we can find out about hunter-gatherers and herders

Unit 2: San hunter-gatherers in the Later Stone Age

Unit 3: Khoikhoi herders in the Later Stone Age



Topic 2

Hunter-gatherers and herders in southern Africa

What is this topic about?

- How we find out about people who lived long ago
- Rock paintings and pottery
- How hunter-gatherers lived
- How they hunted
- Links with how people live today
- How herders lived
- Links between hunter-gatherers and herders

Look at the picture

- Where do you think this place is?
- How do you know this place has a warm and dry climate?
- What could the people be doing?
- Do people still live like this today?

• Hunter-gatherers and herders in southern Africa 25

Figure 5.4 A scan of Text Three: Introductory page 25

The chapter commences with a picture of a hunter-gatherer in the desert, dressed in animal skin. Pertinent questions are asked about the habitat, climate, lifestyles and actions of the people. Learners can infer this from the visual source which is already entitled, ‘Hunter-gatherers and herders in southern Africa, if they already have some background knowledge about the hunter-gatherers. However, insufficient information is given about the source: who took the picture and when was it taken. The information is important in answering the last question “Do people still live like this today?” (p. 25). The learner who is significantly modern and a resident of an urban area might not have seen people attired in this way apart from books or films, so their answer could be anything. The picture creates an opportunity for the learner to visualise the past conditions under which the hunter-gatherers lived. However, it could be an entirely new content for the learner. The start of the chapter immediately casts the learner into a new context. There is a sense of weakening semantic gravity (decontextualisation), even though the position of the people being studied is still within the national borders of South Africa. This is new space for the learner.

Unit 1: How we find out about hunter-gatherers and herders

This unit commences with a word bank explaining the meaning of words like ‘ancestors’, ‘generation’, ‘herders’, ‘hunter-gatherers’. These words are dense and semantically dense (strong density). The explanation weakens the density by providing the meanings for the learners. It makes the task of reading and identifying easier, because it tells us who these people are. The introduction to the chapter locates the San hunter-gatherers and the KhoiKhoi herders in southern Africa ‘long ago’ (p. 26). Within the boundaries of southern Africa the exact location is unclear. The time reference to ‘long ago’ is vague and does not give the learner any clear idea of the years under study.

The chapter provides information about the stories of the indigenous peoples and their lifestyles. The textbook indicates that these stories were said to be passed down by word of mouth, and that sometimes the stories were a mixture of facts and make-believe (p. 26). Learners may question the veracity of the information in the textbook if this statement was discussed and debated in detail. The chapter clarifies that the knowledge of the indigenous people was constructed from stories, objects, pictures and writing, and that some objects found in South Africa had been identified as broken pieces of pottery which constituted evidence of the existence of the indigenous lifestyle. Learners are asked to

engage with a photo of San rock art from the uKhahlamba-Drakensberg National Park, to describe the content of the painting (what animal is in the picture and why the people in the painting are running), what materials were used to create the painting and to account for missing parts of the animals in the picture.

Learners are then presented with information written about the San and Khoikhoi because these groups themselves did not have writing. The textbook identifies the writings of a Dutch traveller (unnamed) 300 years ago and a book called *The Khoisan peoples of Southern Africa* written by Isaac Schapera in 1930. The chapter goes on to discuss how, in the 1950s, an American family called the Marshalls took pictures and interviewed people to get information. Lorna Marshall's observations and writing about the San community in Botswana in the 1950s can, in some sense, give us information about the tribal life and traditions. We view the unnamed traveller's writing, the book by Schapera and Lorna Marshall's work as historical sources. In this section, there is greater emphasis on the types and use of primary sources as evidence to construct stories of people in the past. There is greater substantive knowledge content and a steady increase in semantic density. The location has shifted to Botswana and a new context is presented. The context is also out of the environment and locality of the learner.

Unit 2: San hunter-gatherers in the Later Stone Age

This unit provides a word bank defining an environment and Stone Age very simply and without explanation of what went before. The Stone Age is described as a time long ago when people only had tools made from stone. In terms of chronology and time, this is not sufficient for learners to understand the past. A picture is presented showing the San, in skin cloth, doing various tasks. Learners are asked questions on the picture showing how the hunter-gatherers found and collected food and water. The picture shows how the San dressed, collected water, collected berries and fruit and created fire from friction. Learners are presented with information in paragraph format and a number of pictures presented in sequence which show how the San hunted with their weapons to poison and kill the animals for their food.

Learners are then presented with pictures and information on how the San community functioned as a social organisation and that they did not have leaders or chiefs. Learners also learn how the San lived in groups of 30–40, how they were nomadic and moved

seasonally, about their abodes and clothes, which are described, and mention is also made of how they treated each other equally and with respect. Information is presented about how they used plants for medicine (e.g. Hoodia Gordonii plant) for various ailments. This leads to a discussion on their beliefs and religion, culminating in elaborate descriptions of rock art in southern Africa and the sites where the San lived. The reasons, significance, process and production of rock art are foregrounded with a map presentation of the rock art sites in southern Africa, locating them in context, though the time period is not clearly indicated. What is made clear, is that scientists have said that the earliest paintings are thousands of years ago. It is stated that the last paintings were made about 120 years ago. However, it is not made clear which were the last paintings and how it was possible to gauge this. Again, there seems to be some background information missing. However, the interpretation of the San rock artwork adds to the learners understanding of the tribe and its lifestyle. Different ideas about the life of the San are presented in speech bubbles. These ideas offer some kind of contestation to the rock art and why it was created (significance). One of the ideas presented is that the rock art is ‘just pretty pictures’, another is that the paintings symbolised the San belief system and their lifestyle, while the final idea presented is that the paintings were created by medicine people.

The South African Coat of Arms is used in the text to show how the San drawings and the motto in the San language is now recognised in one of South Africa’s National symbols. The Linton Rock Art Panel, a piece of cave wall which was removed from a cave in the uKhahlamba-Drakensberg in 1917, forms part of the evidence of rock paintings done by the San that learners are shown in the textbook.

Unit 3: Khoikhoi herders in the Later Stone Age

The unit commences with a word bank explaining the term ‘pastoral’ and goes on to describe the pastoral way of life of the herders, once again not giving clear indications of the time period in South African history. Pictures of bones and broken pottery are highlighted as part of the evidence of a past life of the San. Words of travellers and their writings about the Khoikhoi also form written evidence about the San. It is also mentioned that the modern herding communities and their tools help us understand the Khoikhoi, but the chapter does not tell us what it is about the tools that exemplifies this. It is up to the learners and the teacher to decide what tools existed, what their purpose was and how they could have affected the design of modern tools.

Again, in the chapter, it is stated that herders arrived in southern Africa from the North a ‘long time’ ago before the people from Europe arrived in South Africa. The learner would have to know when the Europeans arrived to get a sense of time for the arrival of the Khoikhoi. The idea of time is not sufficiently explained.

Concepts extracted:

- rock paintings, hunter-gatherers, herders, southern African, San, rock paintings, pottery, climate, uKhahlamba-Drakensberg National park, Khoikhoi, clans, tribes, 1950, Stone Age, tools, bows and arrows, hunters, poisons, hunt, weapons, stories, caves, rock shelters, animal skins, Hoodia Gordonii plant, shaman, trance, god/kaggen, ancestors, Botswana, rock sites, 120 years ago, rock art, symbols and beliefs, spirits world, South African Coat of Arms, Linton Rock Art Panel, pastoral way of life, broken pots, bones, generation, wild food, Wind’s son, 300 years ago, Dutch traveller, Khoisan, Isaac Schapera, 1930, American family, Marshalls, Lorna Marshall, chiefs, leaders, plant medicine, animal spirits, dance trance, rock art site, rock powder, *motto: !ke: /xarra//ke* (in English: ‘diverse people unite’), spear and knobkierie, *!G!*(San belief in power).

Time and space:

- Both the idea of time and space is poorly presented by the textbook, as the years of the early existence of the San and Khoikhoi are not known. Also, the precise location of these groups in southern Africa is not discussed or presented. Locating them in a time of ‘long ago’ does not give a clear conception of their history in southern Africa. It is stated that the San paintings were made 120 years ago, but that period is rather vague. It also describes how the Marshall family wrote their observations of the San living in Botswana in the 1950s. It gives the specific location of the Linton Rock Art Panel in uKhahlamba-Drakensberg in 1917 when the panel was taken away from the cave.
- The chapter commences with new concepts for the learners which are specialised to history. ‘Herders’, ‘ancestors’, ‘herders’ and ‘hunter-gatherers’ are strongly dense or exhibit strong semantic density. The knowledge is still in the space of southern Africa, but the context being described to the learner is out of their

everyday experience and has to be described to the learner. The knowledge appears to be increasingly decontextualised (greater semantic gravity). The substantive knowledge, indicated in the increase of ‘concepts extracted’ has been extended and augmented. There is the addition of the National Coat of Arms into the content of the chapter which includes the symbol of the San. The indigenous group is a respected part of southern African history and its inclusion in a national symbols highlights this. The motto and the use of the spear and knobkierie in the national symbol also represents a key general aim of the South African Curriculum: “Valuing indigenous knowledge systems: acknowledging the rich history and heritage of this country as important contributors to nurturing the values contained in the Constitution” (CAPS Social Sciences, 2011, p. 5).

Procedural concepts prompts

Table 5.4 Text Three: Procedural concept prompts

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance		√	
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence			√
Take historical perspective			√
Understand moral dimension of historical interpretation			√

Establish historical significance:

In this chapter there is strong evidence that learners are required to understand what is historically significant. Changes as a result of certain events are presented to learners in the form of books, rock paintings, archaeological findings, rescued writings of a Dutch traveller. By working through this information, learners are expected to acquire understanding of the past and contemporary life.

Use primary source evidence:

There are references to objects from archaeological excavations, books, rock paintings, rescued writings of a Dutch traveller so that learners may construct knowledge about the

past by interpreting and contextualising these sources. Learners are asked to formulate interpretations of rock art by evaluating the primary source of a part of a painting from the UKhahlamba-Drakensberg. There is thus strong evidence for learners to construct an original account of a past associated with the painting, more specifically the San.

Identify continuity and change:

Learners are presented with sufficient detail in text which show how the hunter-gatherers lived, how stories can be constructed about their past from the objects obtained in archaeological excavations and are then able to describe the change in circumstances of the San.

Analyse cause and consequence:

The causes of the change in the lifestyle of the San are not described and learners are not provided with any consequences that they could evaluate in respect of any event. Therefore the coding above indicates that there is no evidence of cause and consequence in this chapter.

Take historical perspectives:

Learners are not required to take any perspective on any historical event. They are presented with information about the San and their lifestyle without having to offer a perspective.

Understand the moral dimension of historical interpretation:

There is no information offered to learners which requires them to demonstrate moral insight. The information in text is simply to engage learners on the lifestyle of a indigenous group of people, informing them of their existence and how this may be confirmed due to the evidence presented in text.

Overall perceptions:

This textbook attempts to contextualise the knowledge for the learner by presenting information in the form of pictures and objects found. These bits of information are supposed to construct a story about the San and Khoikhoi, but the narrative needs more development. There are various bits and pieces of the history of the San presented in the descriptions of their lifestyle and location; But the lack of information on their exact

location and existence in time denotes an incomplete narrative. This is because the groups existed in a time when there was no access to a written language or viable method of recording. The stories that were told about them and those records which acknowledge their history may be all that historians have to go on. It is difficult for learners to construe the existence of a group when information is incomplete. This exhibits strong decontextualisation of the knowledge and the teacher may be needed to fill in the gaps. There is also good reason to establish how it came to be that a photograph of an indigenous man is presented on the introductory page. The details of the photo should be known, whether it serves as a source of information, as it surely is not a historical source.

The language of the text is semantically dense, with new specialised lexis or words of history being presented to the learner. Insufficient information on the time and the location of the groups results in a chronological gap. Many of the pictures that follow on the introductory page are drawings of how the groups lived and functioned. Activities in the text are based on these diagrams and drawings to recreate the life of the San. Progression is noted in the increased number of new concepts that learners are exposed to and a greater number of activities to complete that require a larger amount of skill. These categories will be examined in greater detail in later chapters. The learner is also out of the local environment, in a context of the past which is not qualified by time. Such a context would pose a challenge to learner understanding and appropriate description and detail provided by a teacher may be necessary.

The inclusion of the study of indigenous groups in South African history opens up a 'new' history for southern Africa, which previously began with the arrival of explorers. South Africa, like other colonies, was not 'discovered' by the explorers and the land was not 'empty' and 'uninhabited'. While the present history recognises this, it struggles to link time to early inhabitants. This is the kind of admission that recognises the inaccuracies of the past, but does not deal with the earlier contradictions in the same space.

5.3.4 Text Four: Grade 6

Ranby, P. & Zimmerman, A. (2012c). *Solutions for all. Social Sciences. Grade 6. Learner's Book. Macmillan: South Africa.*

Topic 4: An African Kingdom long ago in South Africa: Mapungubwe

This chapter is divided into six units:

Unit 1: Changes in societies in the Limpopo Valley

Unit 2: Mapungubwe: the first state in southern Africa 1220–1300

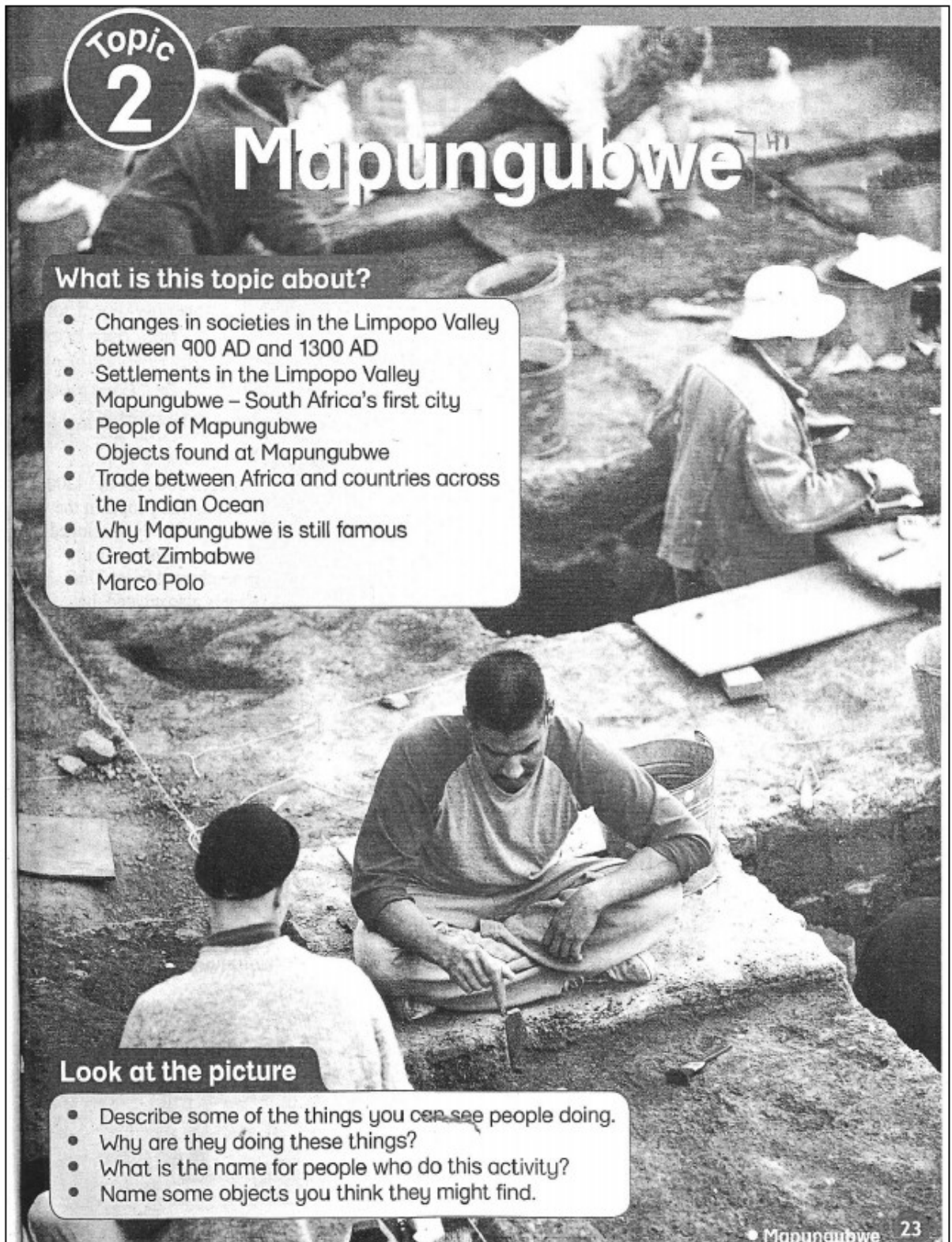
Unit 3: Trade across Africa and across the Indian Ocean and beyond

Unit 4: Mapungubwe today

Unit 5: Great Zimbabwe

Unit 6: Marco Polo explores Asia

Page number of scan: p. 23



Topic 2

Mapungubwe

What is this topic about?

- Changes in societies in the Limpopo Valley between 900 AD and 1300 AD
- Settlements in the Limpopo Valley
- Mapungubwe – South Africa's first city
- People of Mapungubwe
- Objects found at Mapungubwe
- Trade between Africa and countries across the Indian Ocean
- Why Mapungubwe is still famous
- Great Zimbabwe
- Marco Polo

Look at the picture

- Describe some of the things you can see people doing.
- Why are they doing these things?
- What is the name for people who do this activity?
- Name some objects you think they might find.

• Mapungubwe 23

Figure 5.5 A scan of Text Four: Introductory page 23

Unit 1: Changes in societies in the Limpopo Valley

The word bank at the start of the chapter provides meanings for six concepts that are semantically dense and specialised to history. These explanations make meaning clear before the chapter engages with more dense information. This unit commences with a description of the changes in societies in the Limpopo Valley, locating the reader in the Limpopo Valley in South Africa in 900 AD. There is a description of the climate of the area and why African societies were located in that specific area. A picture of an elephant is added to the information that describes why elephants were important for trade in ivory. The concept of trade is introduced, as early Africans began to trade when African societies were first established. The idea of trade being more than local is advanced by the statement that trade took place between “this part of South Africa and the east African coast and beyond” (p. 24). There is a small piece of information, labelled as a source, that concerns a description of a complex society, its first king, palace and state and city. However, this source is not an historical source but obtained from another book. This aspect of contextualisation of sources and corroboration will be dealt with in subsequent chapters.

The chapter then deals with the early settlements in the Limpopo Valley. Here, a colourful drawing of an African village in the Limpopo Valley is shown. The drawing features fields, kraals, different types of huts for the chief, a tribal court area and a particular space for young men to meet, cooking areas and land set aside to grow food and keep animals.

The chapter includes descriptions of the role of chiefs, men, women and children in a well planned early society, providing visual knowledge in the form of drawings to demonstrate this. The settlements of K2, Schroda and Mapungubwe are then discussed and represented by a timeline of changes over time.

Unit 2: Mapungubwe: the first state in southern Africa 1220–1300

The unit portrays the role of the king in the kingdom, describing his abode and sacred leadership. It is an account which learners read and understand while examining photographs and drawings of Mapungubwe Hill. The presentation of information within the text changes where there are more details in the paragraph, whereas in earlier textbooks, simpler paragraphs of information were presented as chunks of information. In

this Grade 6 textbook, there is progression in the format of the text presentation, where more details are given and writing appears smaller and denser. The original visual attraction of colourful photographs and drawings is, however, maintained in the textbook. The learners are presented with knowledge of distinct social classes in a powerful settlement involved in trade, herding and crop production. The archaeological findings of the Golden Rhinoceros, amongst other objects, are particularly important for the young historian to make sense of the stories told of Mapungubwe and to establish the credibility of the existence of a Mapungubwe, which was never presented in former South African history in the Christian National Education. Learners are again shown, by diagrams, pictures and archaeological findings (the object or toy in the shape of a golden rhinoceros), how objects can be used to establish stories of the past. The objects such as the golden beads and the sceptre form part of historical evidence which plays an integral role in disciplinary history.

Unit 3: Trade across Africa and across the Indian Ocean and beyond

In this unit, discussion is of a trade network across the Indian Ocean to Arabia, India and Pakistan, involving commodities like gold, ivory, cloth, beads and fine pottery. New cultures formed and the beginning of globalisation brought international attention. There are map additions to the pages which add to learners' idea of space in the world and in the continent of Africa. There is greater detail on trade commencement and how its patterns shaped the movement and distribution of people. There is also focus on how new communities and cultures formed and merged with others. There is vivid description of trade routes and the experiences of the traders. Large contextual shifts are noted in the space under study. There is an increased number of facts that are historical or substantive. There is an opening up of international space. The language is also dense and more information is presented in smaller spaces of the text.

Unit 4: Mapungubwe today

This unit shifts to the present appreciation of this African society by recognising it as a World Heritage Site and the reasons for this. Historical significance is scaffolded in the recognition of the events of the past which resulted in the formation of Mapungubwe. The unit also honours Nelson Mandela with the Order of Mapungubwe in 2002 for his international and local achievements. Pictures of the current Mapungubwe, Nelson Mandela receiving the Order and a structural picture of the Order are presented.

Unit 5: Great Zimbabwe

Discussion in the text moves onto the reasons why Mapungubwe was abandoned and why Great Zimbabwe came into existence, how similar and different the two places were, and how trade and skilled workers operated in the two contexts. Maps showing the positions of these societies are presented so that learners get a visual sense of their space in the world and in Africa. Each society is described with all its structural components. The location of huts, the type of workers and the economy of these societies are described. There is emphasis on trade and how it connected the societies with the rest of the world. A South African identity in a global economic market is shown, with the African societies playing an important role. Once again, defying earlier presentations of history where Europeans commenced the first trade with indigenous people, this new view of the history of trade is one which began with the first African societies.

Unit 6: Marco Polo explores Asia

This unit shifts from Mapungubwe to the European explorer Marco Polo, who travelled to Asia. Whilst his journeys might have commenced at the same time as Mapungubwe's trading years, inclusion here is contrived, as the relationship between the two topics is minimal. Marco Polo's exploration has a better association with the topic of European exploration in a later chapter. This unit commences with a bulleted description of Marco Polo's early life. This information lists facts about when Marco Polo was born and when he died, where he travelled to and when he returned home. The presentation of the information is also uncomfortable, as it takes the form of a fact sheet which is similar to the way older history textbooks from the 1970s presented information. The unit also presents the route taken by Marco Polo to go to the east on various transport types. It clarifies for the learner how Marco Polo was probably one of the first to view and acquire inventions from China. Also described in the unit is the route taken by Christopher Columbus, who read Marco Polo's book and decided to sail west in order to find the east. However, he sailed to North America instead.

This part of the unit also appears unrelated to the broader chapter, which focuses on Mapungubwe and the existence and importance of early African societies. It is apparent that the choice of the sequence in material is somewhat unclear. The text also contains a further inconsistency in indicating (p. 36) that, "The people who lived at Mapungubwe and then Great Zimbabwe were connected in some way. But they were not the same

people.” The textbook offers no further discussion on what distinguished the people or what connected them. This lack of explanation leaves it open to speculation and disrupts the idea of the development of progression in time or of historical understanding.

Concepts extracted:

- AD, complex societies, Mapungubwe, 800 AD, 900 AD, 1300 AD, 1000 AD, timeline, Limpopo Valley, southern Zimbabwe, Botswana, K2, Schroda, Great Zimbabwe, hunt, king, capital city, Indian Ocean, Atlantic Ocean, source, state, trade, abandoned, archaeologists, palace, rituals, sacred leadership, local chief, hut, cattle kraal, social classes, globalisation, network, settlement, rhinoceros, gold, beads, graves, sceptre, staff, countries, ivory, culture, communities, elephants, modern, Sofala, journey, traders, World Heritage Site, Order of Mapungubwe, achievements, golden sceptre, economic influence, stone carvers, dictated, explorer, Marco Polo, Christopher Columbus, sacred site, ancestors, rain making, sacred leadership, sorghum, millet, Mapungubwe Hill, Saudi Arabia, Iran, Pakistan, India, Arab, culture, Swahili, tortoise shells, Sofala, UNESCO (United Nations Educational, Scientific and Cultural Organisation), Nelson Mandela, skilled copper workers, 1254, 1324, 1271, 1295, Venice, Asia, Europe, China, Turkey, Italy, *The Travels of Marco Polo*, magnetic compass, gunpowder, printing machines, silk, North America, Chinese printing block.

Time and space:

- The chapter commences in the Limpopo Valley in South Africa in 900 AD. It describes settlements of K2 (900–1000AD), Schroda (1000–1220 AD) and Mapungubwe (1220–1300) along the Limpopo River. The learner is required to take note of Mapungubwe Hill and the significance of the location of the palace to ancestors. As the Units 1 and 2 progress into 3, the location of history moves away from Africa across the Indian Ocean to other parts of the world. Trade connections from Mapungubwe were extended to Saudi Arabia, Iran, Pakistan, and India. The time mentioned in Unit 3 is 800 AD. The movement to Unit 4 brings attention to the declaration of Mapungubwe as a World Heritage Site in 2003 and the presentation of the Order of Mapungubwe to Nelson Mandela in 2002. This knowledge is about the historical significance of Mapungubwe in the

present and locates the learner in the present time by describing why the Order of Mapungubwe was given to Nelson Mandela. The final unit removes the learners from the present time and locates them back in time to an entirely different and new space and context. This location is in Europe, when an explorer, Marco Polo, commenced his journey to the east. The unit provides learners with details of Marco Polo's early life and describes his exploration of Asia and all that it had to offer. The time is explained in the textbook as, "about the same time that Mapungubwe was a powerful trading centre". Perhaps the objective was to sequence material is to show chronology and that the early African societies were already developed and engaging with world trade when European exploration began. Here again, this new history of southern Africa debunks the myth that trade commenced in southern Africa with the arrival of European settlers. There seems to be a clear development in time representation, as the early societies are introduced and the development of K2, Shroda, Mapungubwe and Great Zimbabwe follow a timeline in respect of when they came into existence and when they ceased to exist. At about the same time Marco Polo commenced with his own exploration and his life and experiences are also largely chronologically presented. There are more references to dates and centuries, which was not the case in previous textbooks. Here, learners are expected to absorb greater detail of factual content such as dates, time and series of events. There is, thus, an increase in the substantive knowledge, with new ideas and more specific people under study, and increased information in smaller spaces of the text. There is also a large shift in the context. The learner is transported through space from their own country, to a range of new countries outside of national borders.

- The knowledge presented in this chapter is specialised to history and is not everyday common sense knowledge, which was the case in previous textbooks in the sample. Learners are introduced to European exploration and African societies and there is emphasis on time and chronology. The ideas of African societies and the range of related material indicates strong decontextualisation of knowledge which is also semantically dense. The learner is moved significantly out of their own local context in southern Africa to places like Venice, Italy and others. The word bank at the start of the chapter explains the meaning of AD, but does not explain how the system of numbering the years works. The learner may

understand what the acronym means without a full understanding of the historical temporal background. In fact, if textbooks do not undertake the full explanation of how this system works, learners could very well go into the Secondary Phase without understanding time on a historical scale. Also the term of ‘Stone Age’ previously found in the Grade 5 textbook, remains a simple and generalised description without a comparison or discussion of the Iron Age or why the terminology is considered appropriate for this time. The teacher needs to formulate a worksheet on these scaffolding concepts because textbooks have failed to create this understanding. The full explanations of these critical concepts is important for scaffolding the pathway towards progression in history. How, then, do learners understand chronology and the passage of time? The sense of verticality in history is established, as these understandings about time and space, concepts, and foundational skills create a scaffold for the later work requiring analysis and in-depth reasoning, without which essay writing about time and space would be challenged. Regardless of the career choice of any learner, the basic knowledge required at primary school level creates what we call general knowledge later, and it is important that these fundamental understandings of time be established at lower levels, even if history as a subject is not pursued later. This particular topic is ‘new’ to the history curriculum. In the apartheid era, this section of history did not feature. The primary years of schooling did not focus on the first African societies and their involvement in trade as early as has been identified in this textbook.

Procedural concepts prompts

Table 5.5 Text Four: Procedural concept prompts

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance		√	
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence		√	
Take historical perspective			√
Understand moral dimension of historical interpretation			√

Establish historical significance:

This chapter brings to the learner knowledge of African societies and how they existed in the past. The significance of how earlier Africans lived before the arrival of settlers is made evident by Mapungubwe being declared a heritage site. There is strong evidence in the entire chapter of various events that led to change in Southern Africa. A description is provided in the form of a narrative, in chronological conventions by the use of a timeline indicates how African farmers lived in villages and how Schroda, K2 and Mapungubwe were formed before they became abandoned.

Use primary source evidence:

There are references in text to many generic and primary sources. However there is strong evidence in text of how primary sources emanating from excavations can be used to construct stories about how people lived in Mapungubwe.

Identify continuity and change:

This concept is also strongly presented as that chapter shows maps and presents primary sources like objects from the past to show how Mapungubwe was built. Learners are also presented with various pictures that scaffold the idea of change from early societies in Africa to trade across the Indian Ocean and beyond.

Analyse cause and consequence:

There is strong evidence of cause and consequence as there are many historical events which take shape over short and long periods of time, thus creating multiple influences that create change and consequences.

Take historical perspectives:

There is no evidence in the chapter that requires learners to take a historical perspective.

Understand the moral dimension of historical interpretation:

There are also no instances where learners are required to provide insight into moral issues that may affect the present by attempting to understand the perspectives and contexts of historical agents.

Overall perceptions:

Almost immediately, it is noted that the number of units have increased, as has the amount of information on each page. There is increased use of maps and concepts in the word bank. These are the concepts that need prior explanation before the commencement of the unit so that meaning is made through the unit. The increased number of concepts extracted from the text signals new ideas and progression in the amount of content knowledge. While the broad outline of the chapter is about Mapungubwe, the European explorer Marco Polo is rather abruptly placed at the tail end of the chapter. Perhaps there is a time overlap, but the main topic is Mapungubwe, so the final unit seems contrived rather than flowing with the rest of the content. The final unit should have been the introductory unit for the commencement of European exploration. The knowledge that European exploration took place simultaneously to the development of early African societies could have been provided in the background to the chapter.

5.3.5 Text Five: Grade 7

Ranby, P. & Varga, E. (2012). *Solutions for all. Social Sciences. Grade 7. Learner's Book.* Macmillan: South Africa.

Topic 5: The colonisation of the Cape in the 17th and 18th centuries

This chapter is divided into four units:

Unit 1: Indigenous inhabitants of the Cape in the 17th century

Unit 2: Where African farmers were settled

Unit 3: Reasons for VOC permanent settlement at the Cape in 1652

Unit 4: Results of the Dutch settlement

Number of pages: 26

Page number of scan: p. 121

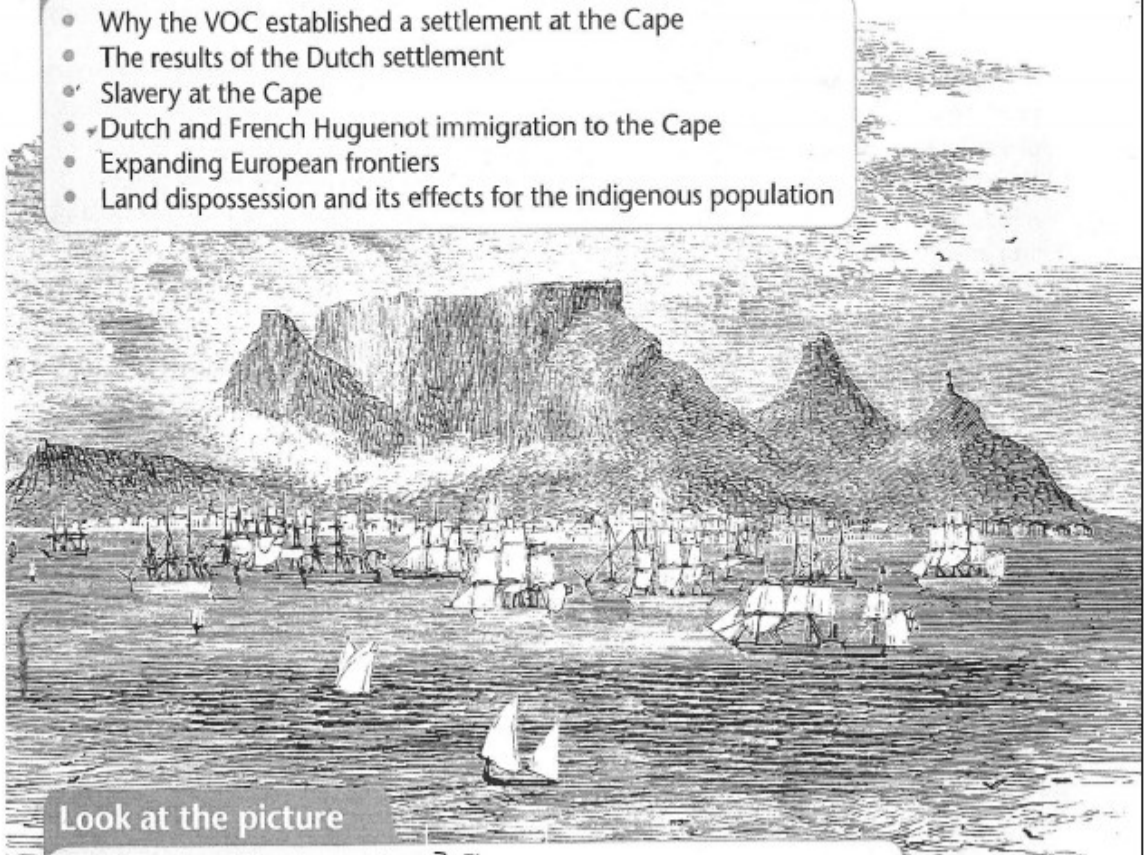
Topic
6

Colonisation of the Cape 17th–18th centuries

HI

What this topic is about

- Why the VOC established a settlement at the Cape
- The results of the Dutch settlement
- Slavery at the Cape
- Dutch and French Huguenot immigration to the Cape
- Expanding European frontiers
- Land dispossession and its effects for the indigenous population



Look at the picture

1. What does this picture show? } T1
2. What do you think was in this place before the buildings were built? } T2
3. Who do you think lived there before the buildings were built? } T3
4. What do you think happened to these people after the buildings were built? } T4

Figure 5.6 A scan of Text Five: Introductory page 121

The chapter is divided into four units: the first two are ascribed to the ‘Indigenous inhabitants of the Cape in the 17th century’ and ‘Where African farmers were settled’, the third concerns the ‘Reasons for VOC permanent settlement at the Cape in 1652’, while the fourth unit on the ‘Results of the Dutch settlement’ is prioritised, comprising 18 pages of the 26 page content on the history of the 17th and 18th centuries. It could be argued that there is very little written on the history of the indigenous inhabitants of the Cape, prior to the 17th century, or on the African farmers. However, this is not the case. The knowledge focus on the indigenous inhabitants came in Grade 5, when the learner was presented with a study of the hunter-gatherers. Since this section is already covered in the earlier grades, the Grade 7 text merely presents some background knowledge to locate the earlier groups, particularly the San in the Cape in the 17th century. There are some other groups, like the Mpondomise, Mpondo, Thembu and Xhosa, which Grade 7 learners may encounter for the first time in the text.

The chapter is introduced by a series of bullets involving key aspects of the colonisation of the Cape which learners are expected to know by the end of the chapter. There is a black and white drawing on the introductory page, with questions directing learners to view the undeveloped Cape coast with its numbers of ships and boats on the surrounding waters. Learners are expected to establish why the coast was undeveloped before the arrival of the settlers, who had inhabited the area before the arrival of the settlers and what had become of them when the area became developed.

Unit 1: Indigenous inhabitants of the Cape in the 17th century

The chapter commences with a word bank exemplifying meanings of ‘indigenous’ and ‘inhabitants’ as the critical knowledge for the remaining unit. Learners acquire knowledge on San, Khoikhoi, Mpondo, Thembu and Xhosa. Their lifestyle of hunting and gathering food and farming is foregrounded. There is an activity testing learners’ ability to infer what tools the indigenous people would have used to live their particular lifestyles. However, there is no substantive content knowledge in the textbook which learners can go to in order to check this. They have to depend on their prior learning about indigenous inhabitants in Grade 5 to answer the questions. What content knowledge is presented, is done so in bullet form and focuses on the early inhabitants, their lifestyles and dialects. A map showing their location is unclear because it lacks a key. A key is important to understand the location of the tribes. The map is also small and the names of the early

groups are written on the map, but does not name territories. This activity would challenge learners because they would have to find another map to understand location. The information alongside the map does locate 'other groups of people' in the Eastern Cape, but this province and its borders are not clearly shown. The manner in which the names are written over the province could be very confusing for the reader.

In earlier textbooks on this topic, information was obtained from written, visual and oral sources and objects. There are no sources provided in the first unit of the chapter in the Grade 7 textbook to validate any of the claims on locality. The map functions as a source of information rather than a historical source. The absence of a key challenges the authenticity of the information placed in the map as well as understanding. Only the position of the Khoikhoi is coloured in a darker brown on the south and west border of the Cape Province. It is inconsistent with map procedure to colour code only one tribe when the position of others equally need to be noted on a map.

Unit 2: Where African farmers were settled

This unit progresses or builds on the knowledge in previous units. Learning shifts from the identification of tribes, to their locality and their livelihood. This unit is very strongly associated with the discipline of geography, focusing on maps and on what crops African farmers grew and why. Rainfall and seasons in southern Africa influenced the location of African farmers as well as the type of farming. The activity involves practices or procedures followed by geography specialists. Learners identify where tribes were located and how the rainfall and seasons of these locations influenced the type of crops they grew. This integration of subjects is useful for the understanding of the location and practices of the African farmers. However, because the location of the groups of people is unclear on the map in Unit 1, learners could struggle with relating location to the rainfall and seasons. The San, for example, are positioned in the centre of the Cape, but without any particular colour coding. The Khoikhoi are represented in a dark brown shade. Inconsistency in the map showing the location will compromise the activity involving all the maps.

Unit 3: Reasons for VOC permanent settlement at the Cape in 1652

The unit commences with a word bank defining ‘voyage’. It deals with the voyages of the 16th century to the east by European voyagers who stopped at the half-way station at the Cape to trade with the San and Khoikhoi. The unit gives details on how the Dutch ships were controlled by the DEIC (Dutch East India Company) or VOC, and how they built a fort at the Cape to protect themselves when they set up a permanent settlement at the Cape. The settlement was created to supply fruit and vegetables for passing ships and for rest and medical attention.

The unit is presented as a story/account with some evidence or reference to sources. A picture included is captioned: “This picture was created in the 17th century. It shows trade between Khoikhoi and European people.” (p. 124). However, the picture is a drawing and there is insufficient source contextualisation: by whom and when it was created and the motivation for its creation are not sufficiently dealt with. It is almost as if its authenticity is not questioned. There is also a map showing the route that Europeans took to get to the East.

The unit describes how more Dutch settlers were required at the Cape to service their refreshment station, and locates about 1000 Dutch settlers at the Cape in the early 1700s. The story advances to show how settlers built houses, shops, taverns, offices and new towns. There is discussion on how they became blacksmiths, carpenters, bricklayers, innkeepers, bankers, officials and farmers as they developed the area. The textbook indicates that the settlers “bought some land from the Khoikhoi” (p. 125) and that they also went to war with them and “took over some of their land that was best for growing crops and grazing animals”. This information is part of the new history of southern Africa yet there is little evidence in support of these claims. A historical source in the form of an extract from Jan van Riebeeck’s diary adds to the learners’ ideas of land ownership. This source is obtained from a website which is acknowledged by the textbook. In this source van Riebeeck writes that they had won the land from the Khoikhoi in a war. The source acknowledges that the indigenous inhabitants saw themselves as the “natural owner” of the land and the settlers as the “foreign invader”. Learners are asked to justify the fairness of this viewpoint in the activity. The second-order concept of moral development is framed in this activity.

Unit 4: Results of the Dutch settlement

Since the VOC did not allow the indigenous people of the Cape to be enslaved, slaves were imported from North Africa, Angola, Mozambique, Madagascar, India, Ceylon, Batavia, Indonesia and Malyasia. A map showing this movement is attached to contextualise this for the learner. A detailed discussion on the life of the slave is undertaken in the form of an account, but presented in bullets. Information about how slaves were transported, their lifestyle, work, family, and how they were sold, is described. Pictures depicting their lifestyle and a poster advertising slaves are some of the images in the unit. Whilst the pictures look like primary sources, they are not. They are black and white secondary sources, giving learners the impression that they were created at the time of slavery, but these are reproductions of what a primary source would have looked like. The secondary sources, nevertheless, do provide the learners with a sense of the past. The poster is not sufficiently contextualised. Its origin and authenticity is not known. The picture, labelled as ‘Source B’, is merely a picture, but the source is not contextualised for the learner. Perhaps, in its appearance, it looks ‘historical’, but a historical source must be an authentic source. Here, the insufficient details on its construction as a historical source questions its authenticity. The picture on the slave lodge is also questionable. The rules for slaves written on a rugged looking document printed in this unit is labelled as a ‘source’, but is accessed from a website according to the caption. This is also insufficient for a learner to use the procedures of a historian to argue its authenticity or origin.

The unit advances to describe the causes and effects of slave resistance at the Cape, using the case studies of Galant’s Rebellion which depicts the atrocities of slave life that forced a slave to incite rebellion by murdering his owner who would not release his slaves even though there was the potential for their release. The 1808 rebellion is also in a case study format. A description of slave affiliation to the religion of Islam and the language of Afrikaans precedes a description of the lifestyle of the Free Burghers, who were actually the increasing settlers in Cape Town and surrounding areas.

The expansion of the settlement was followed by movement into the Cape interior. A map showing this movement of people inland away from Cape Town contextualises the trek for the learners. The lifestyle and stories of trekboers are presented with accompanying

pictures. Once again, the appearance of the pictures conveys history, but the authenticity is questionable due to minimal contextualisation. The final part of the chapter deals with land dispossession and the consequences for the indigenous population, the Khoikhoi and San, who lost their land to the trekkers in wars. The text indicates that it was at Genandal Mission that Christian missionaries converted Africans to Christianity and where a big community was established, becoming the second largest town in the Cape after Cape Town. The unit is concluded with a description of how the writings of Lucy Lloyd and Wilhelm Bleek preserved the stories and language of a San group, the /Xam people of the Northern Cape. The chapter also notes for the learner that the traditional language of the San is no longer spoken, but that the work of Lloyd and Bleek allowed history to remember the language and culture of the San. The role of the missionaries, particularly the Genandal Mission, is described to illustrate how education of the indigenous people commenced. Finally, it is discussed how the 19th century saw the work of Lucy Lloyd and Wilhem Bleek. The written stories and the language of the San people were embedded in the artefacts Lloyd and Bleek collected. The text presents information on how they eventually published a book in 1911 documenting the culture and language of the San people.

Concepts extracted:

- colonisation, Cape, 16th, 17th, and 18th century, DEIC, VOC, settlement, Dutch, slavery, French Huguenot, Free Burghers, immigration, hunter-gatherers, Khoikhoi, Nguni, Mpondimise, Mpondo, Thembu, Xhosa, European frontiers, land dispossession, indigenous, inhabitants, millet, sorghum, Jan van Riebeeck, Castle of Good Hope, Boers, blacksmiths, journal, pasture, North African, Angola, Mozambique, Americas, Madagascar, India, Batavia (Jakarta), Indonesia, Malaysia, Ceylon, Portuguese, Holland, laundresses, seamstress, wet nurse, branded (burnt), passes, manumitted, modern historian, branded, flogged, lodge, hanged, burghers, slave, slaveowner, Willem Klomphaam (Afrikaner), slave resistance, citizens, rebellion, Van der Merwe, Hangklip, executed, Free Burghers, 1652, illiterate, French Huguenots, Malan, De Villiers, Le Roux, Theron, trekboers, land dispossession, Genandal, Georg Schmidt, 1738, missionaries, 1652, 1850, 1862, 1875, 1703, 1774, 1911, tavern keepers, blacksmiths, colony, mission station, Lucy Lloyd, Wilhem Bleek, Schmidt, 1744, 19th century, millet, sorghum, European ships, voyage, traded, foreign invader, journal, innkeepers,

Arabs, Portuguese slave ship, Slave Lodge, chaining, slave rebellion, colony, abolish, execution, legacy, independent farmers, enslave, German immigration, Cape Town, Stellenbosch, Swellendam and Graff-Reinet, Protestant Christians, Catholic, clash, ox wagon, kloof, trekboers, herdsman, smallpox outbreaks, Christian missionaries, /Xam language, linguist, traditional language, //Kabbo, Diä!kwain.

Time and space:

- The first and second unit is located in the 17th and 18th centuries. It highlights the reasons for the arrival of settlers to South Africa, describes who originally lived in this space, and how the settlement affected the distribution and lives of the indigenous people. The focus is on the Cape and its inhabitants. The third unit goes back to the 16th century when European ships started to sail around the Cape on their way to the East to trade. The position of the Cape being halfway to the East led to the VOC setting up a refreshment station at the Cape. Unit 4 advances to the VOC accruing slaves from around the world to do their work: North Africa, Angola, Mozambique, Madagascar, India, Batavia, Indonesia, Malaysia, and Ceylon. The chapter then describes how the settlement of the Dutch at the Cape in 1652 increased and European settlement extended to the German and French Huguenots, and how expansion of the settlement resulted in movement into the interior. Finally, the chapter concludes in the 19th century, with the work of Lucy Lloyd and Wilhem Bleek who published a book documenting the language and culture of the San people.
- The shift of knowledge from the local environment towards national and international areas locates the learner in a different space and time. In fact, there is a sense of ‘South Africa in the world’ and ‘how the world came to South Africa’. The learners are told about how certain countries from around the world came to be involved in South Africa. The presentation of information appears to follow a chronological framework. This section follows on from Grade 5 history, building on how the indigenous inhabitants met with the Dutch at the Cape. The story then advances in Grade 7 to describe the life and trials of the indigenous people and the explorers and how they interacted with each other. The story or the chapter

concludes with the indigenous population being dispossessed of their land. The learner is brought back to the local space in the Cape at Genandal, where some dispossessed San and Khoikhoi went to live.

- The text has become dense and specialised to history. There are many new participants involved and there is also an increase in focus on general, individual and specific people from the past. For example, mention is made of the French Huguenots as general participants, Khoikhoi are a significant, specific group being studied, and individuals like Wilhem Bleek and Lucy Lloyd, who had no direct involvement in the history of South Africa, are now represented in this history because of the role they played in preserving the culture and language of the /Xam people.
- Many years are included in this study time period, but the text sets the story within a chronological framework. The text time (first this happened, then that happened) or sequence is different from the external or real time (the chronological history of South Africa in years). The history of southern Africa is represented in chronological external time. As a story unfolds, different events cut across which could be related to other dates, events and people in the past.

Procedural concepts prompts

Table 5.6 Text Five: Procedural concept prompts

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance		√	
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence		√	
Take historical perspective		√	
Understand moral dimension of historical interpretation		√	

Establish historical significance:

In this chapter there are various units representing many events which have resulted in change and these changes have been enduring in history and in contemporary life. The

arrival of settlers in South Africa set the scene for major change and altered the settlement of all groups in southern Africa, including the indigenous people. The establishment of the refreshment station at the Cape and the clashes which took place over cattle and land set the stage for larger changes which are all historically significant.

Use primary source evidence:

There is strong evidence of sources in the text but these are controversial as many of them are generic sources of information, created to ‘appear’ like a primary source. This will be dealt with later in the study. However, learners do engage with them as though they are primary sources. For example, learners engage with a poster advertising slaves at certain prices as well as a picture that was created in the 17th century. However, none of the sources are appropriately contextualised even though they do assist in constructing accounts of historical events.

Identify continuity and change:

This concept is strongly evidenced in text. The sheer magnitude of change is reflected in the many events foregrounded in the chapter. The introductory scan shows a drawing of an undeveloped CapeTown. The ships which arrive at the harbour are showing how settlers made their entrance to South Africa. Learners are immediately engaged in the question of how this place changed. They are asked:

1. What do you think was in this place before the buildings were built?
2. Who do you think lived there before the buildings went up?

These questions are clearly linked to the change that spiralled through South Africa after the arrival of the settlers. This provides strong indication of the second-order concept of change and continuity.

Analyse cause and consequence:

Similarly the number of events is consequential for the people and the environment in South Africa. The consequences of the arrival of settlers at the Cape had huge effects on the indigenous inhabitants and the general landscape of the country. Like the discussion on the previous second-order concept the learner is immediately engaged by an introductory drawing of the Cape Town harbour before settlement. They are asked: What

do you think happened to these people after the buildings were built? These people, being the original inhabitants of the Cape. This is a direct consequence of the arrival of settlers, bringing in issues of land ownership, disputes and migration. There is strong presence of the cause and consequence second-order concept in this chapter.

Take historical perspectives:

Learners are constantly questioned on the social, economic and cultural effects of the changes that occurred. Therefore they are often required to take a perspective in order to explain change. For example they are given two case studies of Gallant's rebellion in 1825 and the 1808 rebellion. They are asked to explain why the rebellions failed. Learners are required to deliver an explanation for the failure of the rebellions by engaging with the case studies. Later in the chapter they are asked to think of reasons as to why many Afrikaans words about food came from the language the slaves spoke. These are not clear answers and learners would have to think historically to take some kind of perspective before answering them. Strong evidence of this second-order concept is coded for this chapter.

Understand the moral dimension of historical interpretation:

In the light of the many changes and controversial versions of the same event, learners are called upon to engage with case studies of particular issues. Learners are asked to think about whether the slave rules were fair. They are also given a source which contains a journal entry by Jan van Riebeeck. Van Riebeeck tells the Khoikhoi leaders that they have lost their land in war so they will not get it back. Learners are then asked to think whether this was fair? Both examples indicate a strong presence of the moral dimension in historical interpretation within this chapter.

Overall perceptions:

As the textbooks advance in grade, there appears to be a gradual increase in the substantive content. There is an increase in the number of new concepts, dates, shifts in space, and the opening up of southern African to other countries. In the Grade 7 textbook, while there appears to be greater detail in the scaffolding and understanding of the period under discussion, the history of the period remains the 'grand old story' of European expansion into Africa in bullet format. There is a great deal more information that could have been included, but the writers have attempted to describe the theme in the best

possible way without leaving out critical dates and information. However, it must be noted that the same story can be told at a greater length. Writers have made selections to bring the history of theme closer to the learner, so that general, yet structured ideas are grounded. A simplified account cannot be considered as a comprehensive account of colonisation. However, time in the curriculum does not allow for comprehensive accounts, especially in history. There are other topics and themes for study. This is the reason why history, in its themes, runs through different phases in the school curriculum. At the end of the years of compulsory study of history, it is expected that the story or the history of South Africa be told in the simplest yet most effective way, while taking into account the methods or procedures necessary for a disciplinary study. Whether this actually happens, is a platform for extensive debate. In this textbook, the course content is covered and teachers and learners who use the book will have obtained a general, if inadequate coverage. The coverage of all the second-order or procedural concepts is noted after the analysis. Progression is noted, thus, in both the substantive and second-order concepts.

5.3.6 Text Six: Grade 8

Friedman, M., Ranby, P., Varga, E. (2013a). Social Sciences. Solutions for all. Learner's Book. Grade 8. South Africa: Macmillan.

Number of pages: 34

Topic 6: The Mineral Revolution in South Africa

Page number of scan: p. 137

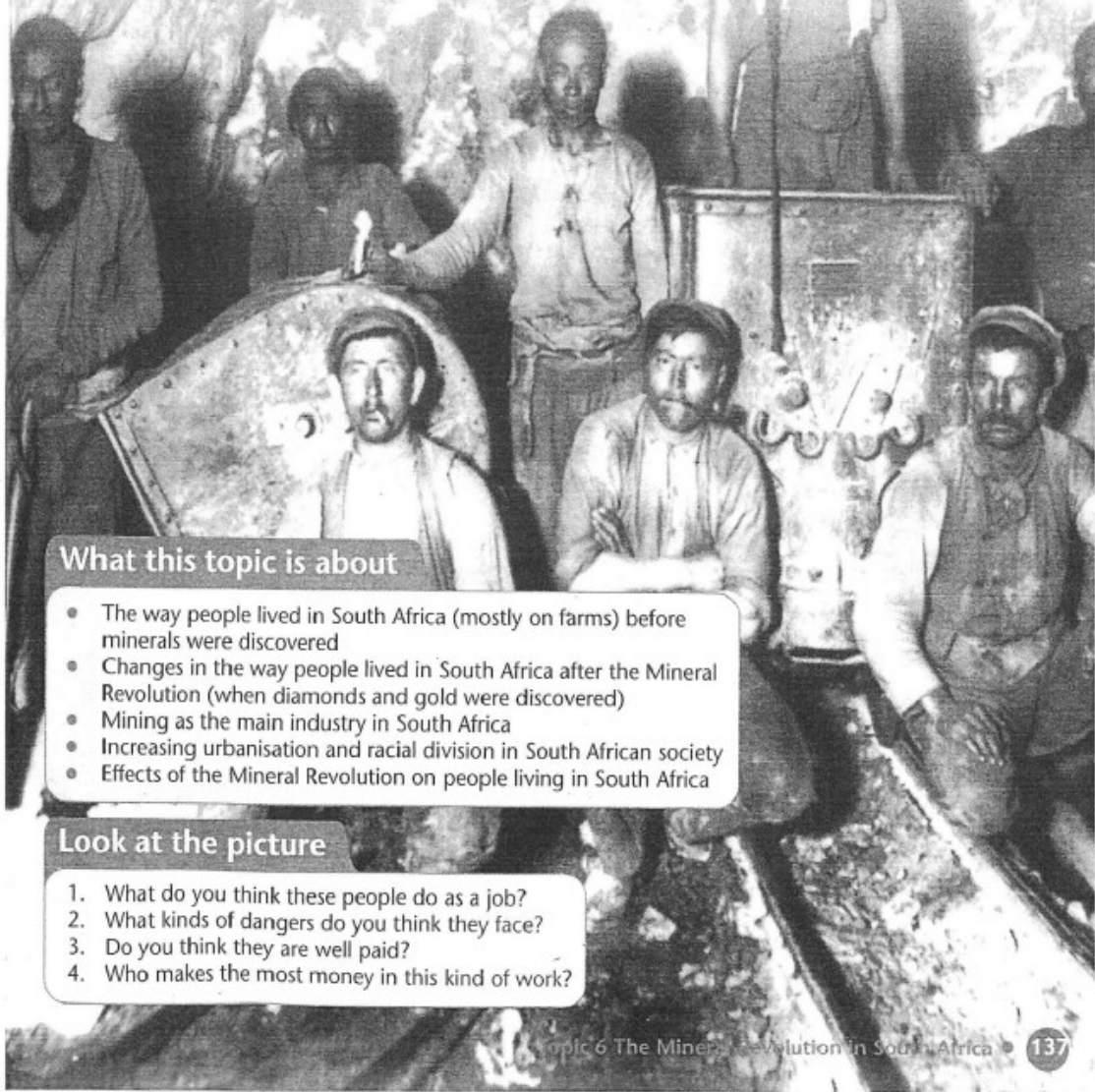
This chapter is divided into two units:

Unit 1: Britain, diamond mining and increasing labour control and land expansionism

Unit 2: Deep level gold mining on the Witwatersrand from 1886 onwards

Topic
6

The Mineral Revolution in South Africa



What this topic is about

- The way people lived in South Africa (mostly on farms) before minerals were discovered
- Changes in the way people lived in South Africa after the Mineral Revolution (when diamonds and gold were discovered)
- Mining as the main industry in South Africa
- Increasing urbanisation and racial division in South African society
- Effects of the Mineral Revolution on people living in South Africa

Look at the picture

1. What do you think these people do as a job?
2. What kinds of dangers do you think they face?
3. Do you think they are well paid?
4. Who makes the most money in this kind of work?

Figure 5.7 A scan of Text Six: Introductory page 137

The chapter commences with a black and white photograph of miners in their working attire in a mine shaft, and learners are requested to look at the picture to answer questions on it. The objective is to identify mining as an occupation, describe the kinds of dangers faced by these workers in their working environment, and to indicate whether they are well paid for their efforts. The questions also requires the learner to ascertain who obtains the most money from this kind of work.

Unit 1: Britain, diamond mining and increasing labour control and land expansionism

This chapter commences at the end of the topic ‘The Industrial Revolution in Britain and southern Africa from 1860’. The topic includes how diamonds were discovered around the Orange River, and how Britain took control of the areas where diamonds were found. The introduction to the unit is preceded by a word bank where ‘economy’ and ‘independent’ are defined as critical core concepts. There are other word banks which later present far more complex concepts for learner translation. Learners’ knowledge of the previous chapter on the diamond mining monopoly and land divisions is refreshed. It is restated that the discovery of diamonds in the area around Kimberley, when South Africa did not yet exist as a country, created the foundation for the Mineral Revolution. The increasing control over black owners, in the form of migrant labour and hut tax, is portrayed by the inclusion of two sources: the published works by Pampallis and Potenza. Although the sources provide ‘evidence’ of the situation on the hut tax and migrant workers respectively, these sources were published in 1991 and 1996 and they present information from 1871 and 1875 as undisputed facts without referencing their own sources of information.

The chapter progresses to describe in detail how the migrant labour system and closed compounds came into existence to serve the interests of mine owners. The hut tax was an additional tactic to push people into migrant labour. The difficult living conditions of the closed compounds are described and real photographs are used to contextualise the knowledge for the learner. The black and white photographs add an element of reality to the experiences of the workers and their harsh living conditions. One of these photographs shows the De Beers compound at Kimberley in the 1890s (p.143), and another shows how miners queued in lines waiting to be searched before they left the mine (p. 142). These photographs have simple captions describing what they are about,

but do not give any details of who took them pictures or when they were taken. It is, thus, difficult to determine their authenticity because provenance of the images is incomplete. Provenance involves appropriate sourcing, corroboration and contextualisation (Havekes, Coppen, Boxtel & Imants, 2009).

The chapter advances with greater detail on further land dispossession and the defeat of the African kingdoms, namely, the Xhosa (1878), Pedi (1879), and the Zulu (1879). In each case, details are provided on how resistance was offered by the different groups, and the efforts of the chiefs to engage in wars for their land and people. An account is given of how each group suffered defeat and the loss of their land.

Unit 2: Deep level gold mining on the Witwatersrand from 1886 onwards

The first word bank here is essentially words that could belong to any subject other than history: ‘conducts’, ‘corrode’, ‘decorative’ and ‘represented’. These words are everyday or related to science or art, but are not specialised to history. They are not critical or core concepts for inclusion in a word bank because their meaning is accessible. Later in the chapter, other words like ‘shaft’, ‘seam of gold’, ‘ore’, ‘skip’, ‘conveyor belt’, ‘Randlord’, ‘Chamber of Mines’, ‘recruitment agents’, and other dense concepts are not explained. The textbook authors assume that these words will be understood by the learner. The meanings are not easily accessible and the teacher would have to engage the learner on each of the concepts presented.

The chapter commences with recognition of the value, uses and properties of gold. Pictures of gold items are used as general sources of information. The discovery and mining of deep level gold on the Witwatersrand led to the Transvaal becoming a busy, industrial area. A description and a diagram (a source by Potenza) of how gold is mined is presented, along with a source. The sources that appear in this unit are more generic than specialised, historical sources. For example, one source shows a woman’s neck draped with gold necklaces, while another shows a gold tooth in a man’s mouth. After a general, rather than historical introduction, the conditions of the miners become foregrounded. Discussion of how the Chamber of Mines came into existence provides insight into how mine owners made a good profit. It is explained how they could only managed this by spending less on their labourers and more on machines, as the international markets determined the price of gold. The pass system was the miners’ license to enter the city

and meant that mine workers were forced into migrant labour because, when their contract was over, they did not get a new pass. Black miners had to endure much worse conditions than white miners, as they had to live in compounds and were separated from their families who had to fend for themselves in the miners' absence. This information is presented to learners as an account of fact.

The focus then shifts to the 1885 Anti-Indian legislation, which intensified after 1900 when Indian people were not allowed to own property but could only rent. There is brief reference to the fact that Indians also moved to the goldfields to make money, and that they lived in separate, crowded and dirty compounds. The forms of labour resistance are explored, followed by a list of sources giving details of Johannesburg's development. These sources include a map, photographs of people and various parts of Johannesburg, showing mines, activities of people and the underdevelopment of roads and small houses. The Mineral Revolution is evaluated as a turning point in South African history, affecting the lives of all people in South Africa as power was rebalanced. A timeline of events from 1902–1910 is then presented, presenting important factors concerning Indians, Boers, British, Coloureds and Zulu before the Union of South Africa came into existence in 1910. In other words, South African society became established.

The facts presented are many, about the formation of different resistance groups and their leaders and their actions to defend their rights towards a fair and just existence, and require a great deal of explanation. Resistance organisations such as the SANNC (the ANC today) and the Satyagraha Campaign came into existence in 1912–1913 to defend those affected by unjust laws. 1913 was, incidentally, the same year that the South African government passed the Land Act law which effectively separated the living areas of different races. A map is used to show the areas that were reserved for black people under the Land Act. Finally, in this unit, an 1860 map of South Africa is compared with a 1913 map, showing how the population had shifted in their distribution. The unit is concluded with the understanding that the balance of power shifted so that Afrikaans and English-speaking people had the most power and were the only people allowed to vote.

Concepts extracted:

- labour control, revolution, land expansionism, economy, hut tax, reserves, land dispossession, Kimberley, Orange River, Britain, Cape Colony, Natal, Griqualand

West, Chamber of Mines, Griqua, Nicholas Waterboer, De Beers Consolidated Mines, John Pampallis, Lesotho (Basutoland), De Beers Compound, digalajane (deceivers), minerals, pass system, urbanisation, labour resistance, racial division, independent states, compound, migrant labour, closed compound, historian, Randlords, Boers, Afrikaners, Xhosa, Swazi, Pedi, Zulu, federation, alliance, kingdom, Boer Republics, White domination, clash, exiled, recruitment stations, ancient civilisation, industrial prospectors, ore, smelt, shaft, conveyor belt, seams of gold, skips, process plant, mine dumps, Cecil John Rhodes, Mpondo, Pondoland, England, Transvaal, Pretoria, Johannesburg, Parktown, Port Elizabeth, Doornfontein, Chief Sekhukhune, Mahadu Nkadimeng, Chief Cetshwayo, Zululand, Orange Free State, Isandlwana, Rorke's Drift, Ulundi, Mapungubwe, University of Pretoria, Witwatersrand, Kimberley, Sekhukhuneland, Paul Kruger, TIC (Transvaal Indian Congress), Mahatma Gandhi, APO (African Political Organisation), Uitlanders, Abdullah Abdurahman, South African War, Union of South Africa, Bambatha Rebellion, poll tax, Chief Bambatha, Zondi clan, Nkandla Forest, ANC (African National Congress), SANNC (South African Native National Congress), Thomas Mapikela, Walter Rubusana, John Dube, Sol Plaatje, Saul Msane, Satyagraha Campaign, Land Act, 1830–1840, 1843, 1860, 1865, 1870, 1871, 1872, 1875, 1878, 1885, 1886, 1879, 1887, 1888, 1897, 1898, 1899, 1890, 1990s, 1902, 1906, 1910, 1912, 1913–1914, 1960.

Time and space:

- The time period after 1876 comes under scrutiny after the discovery of diamonds in the South African context. At this time South Africa did not exist as an independent state. Britain controlled the Cape Colony and Natal. The chapter focuses on the interior, as well as how movement of people was influenced by the gold rush. Between 1876 and 1886, some of the areas mentioned in the list of concepts above were affected by British encroachment, which resulted in the loss of land by the black tribes in battles. From the list of concepts it is noted that the years featured extend from 1830 and the chapter closes with content that ends with 1960. There is substantial movement in time and space. However, the chapter locates this information within a chronological frame which makes it easier for the learner to follow. The way the sources are used differs in each text. The analysis of the sources will take place later in the chapter set aside especially to investigate

this aspect. At this point, however, it is important to make a general observation: sources appear to be used in generic ways, some are not historical, but function as sources of information and some do not show correct or appropriate provenance.

- Learners are still located in the context of their own country with many references to distant national places. There are also international references. However, the knowledge presented is dense and increasingly decontextualised.
- The terminology, or the concepts that are being advanced in this chapter are different from the others in the sample. Some of the concepts are specialised to history (like colony and land dispossession), while others display the specialised or technical lexis of other subjects. For example, in the diagram that shows how gold is mined (p. 150), there is reference to ‘seams of gold’, ‘a skip that takes the oar to the top’ and ‘a large shaft which is sunk by machines’. This is language which is out of the experience of both the history teacher and the learner and requires research prior to engagement with the text.
- The textbooks for the lower grades display simpler knowledge and the language used is concrete and everyday and meaning is easily accessible. This textbook, however, displays increasingly abstract concepts and terminology that is complex. Learners are required to process a large number of facts in a small space of time. The curriculum stipulates the number of hours for the completion of this topic. It may not be easy to teach this section when the language presented is a challenge. The teacher would have to construct many explanations throughout the unit and new people, events and dates permeate the chapter. Learners may also find it difficult to follow the new meanings.

Procedural concepts prompts

Table 5.7 Text Six: Procedural concept prompts

Procedural Concepts	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance		√	
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence		√	
Take historical perspective		√	
Understand moral dimension of historical interpretation		√	

Establish historical significance:

The entire topic and its explanation in text is in itself historically significant. Learners are introduced to the Mineral Revolution in South Africa which has various inter-connected events such as the arrival of settlers and the disputes over land claims. The strong evidence in text provides learners with an understanding of the significance of the large event and the other events which arose as a consequence. The social, political and economic significance is developed through the chapter.

Use primary source evidence:

The strong evidence in text is coded because of the presence of important sources and how they are used. The chapter includes two sources: the published works by Pampallis and Potenza. These sources provide 'evidence' of the situation on the hut tax and migrant workers respectively. While they were published in 1991 and 1996 and they present information from 1871 and 1875 as undisputed facts without referencing their own sources of information. There are other sources that include photographs of miners, section of a compound, and a De Beers compound in Kimberley in 1890. Learners are asked to engage with these sources in order to understand how miners were searched, how they lived in the compounds and they are even asked how the facilities could have been improved. These kinds of activities would require that a learner think in terms of the past by providing a personal evaluation.

Identify continuity and change:

The very nature of the topic under study indicates that change was imminent. The event of the Mineral Revolution is explained in various ways but the rate of historical change is scaffolded through learners engaging with various maps and their political nature. Land expansionism and labour control are other effects that show what remained the same and what continued to be adjusted through the years. Strong evidence of the concept was coded to indicate the nature of change.

Analyse cause and consequence:

Strong evidence of cause and consequence is coded in response to the large event under study and the number of political, social and economic consequences which arose. The number of inter-connected events also contribute to the rate of change and therefore

consequences arise. The learner must understand the order of events or chronology in order to place the consequence after the cause. They also should be able to understand that the consequence of one event could very well be the cause of another consequence. There is strong presence of the second-order concept of cause and consequence in this chapter. As with an advancement in grade, there is greater historical knowledge presented to the learner. Information presented is greater in complexity and challenges the learner in various ways. However, it may be said that there is greater engagement with this second-order concept when the amount of historical knowledge increases, that means, there is more history content knowledge, more events and more causes and consequences to engage with.

Take historical perspectives:

The learner is requested to formulate their own perspective in relation to Mineral Revolution in order to understand why mining companies wanted to control their workers. They are also given photographs of the compounds and asked to evaluate them and offer ways on which mining companies could have improved on certain facilities. There is a substantial increase in questions where learners are asked to motivate personal answers from understanding the course of the Mineral Revolution. These answers just cannot be approached anachronistically but need a thorough engagement with the order of events in order to present discussion. The nature of this coding, however is very different from earlier coding because what is being coded in higher grades are essentially complex and compact information. There is more to code because the number of events under study are greater. It is then fair to say that the coding warrants a stronger position in relation to the past appearances of historical significance.

Understand the moral dimension of historical interpretation:

Here too, the learner is frequently drawn into discussion on their personal take of a historical situation. For instance, they are asked what they thought the miners felt like when they were searched. They are also asked for what families of miners felt when the head of the family had to leave home to support the family. Learners are also asked to think about what was the most difficult part of miners' living in compounds. Learners would need to understand the effects of a loss of a family and home as well as the living conditions in a compound while being bound by laws. Their responses would be based on a moral dimension of historical interpretation. In this instance, the coding would be very

strong on the continuum of very weak to very strong presence of this particular second-order concept.

There are more examples of this nature within the chapter where the learner is asked to draw from their own moral tool-kit but there is not enough room to engage with all.

Overall perceptions:

The first impression of the text is that the print is much smaller and denser than the previous textbooks. Even the activities are more concentrated, as there are a greater number of tasks and words. Each knowledge statement appears to be conceptually heavier. The unit headings also appear to be fleshed out and conceptually laden with multi-meanings and innuendos. For example, ‘expansionism’ in the title of Unit 2 has various interpretations, but only in-depth analysis and text engagement would show its actual meaning.

My analysis of this chapter shows that each of the second-order concepts were engaged with. There is a gradual buildup of substantive knowledge and second-order concepts from the earlier textbooks to this one. This particular text, however, infuses many new ideas, people, events and dates into its content, displaying the largest amount of substantive knowledge thus far in the sample of textbooks. The years under study are expansive and the space of southern Africa is opened up to the world as it forms its society with people from around the world.

This is a powerful chapter on its own, because the discovery of diamonds and gold changed South Africa completely. It shows the learner how power came into the hands of the minority. It describes how the British took over the land and became rich mine owners, while they forced black people to work in the mines. The loss of power and freedom resulted in the formation of groups like the ANC to fight against unfair laws. The loss of black independence is demonstrated by the Land Act which set aside 7% of the land for 67% of the population.

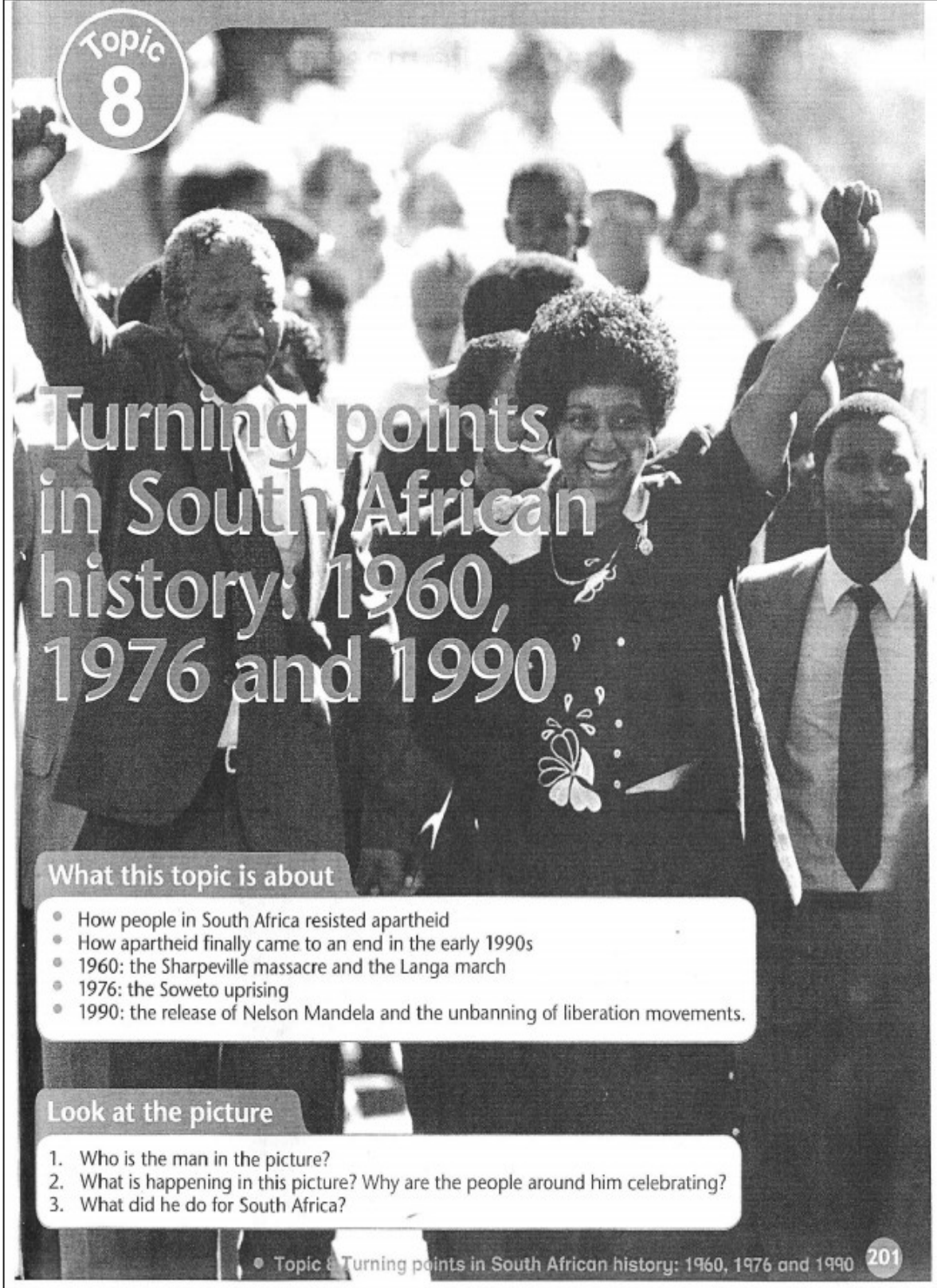
5.3.7 Text Seven: Grade 9

Friedman, M., Ranby, P., Varga, E. (2013b). Social Sciences. Solutions for all. Learner's Book. Grade 9. South Africa: Macmillan.

Topic 7: Turning points in South African history: 1960, 1976 and 1990.

Number of pages: 32

Page number of scan: p. 201



Topic 8

Turning points in South African history: 1960, 1976 and 1990

What this topic is about

- How people in South Africa resisted apartheid
- How apartheid finally came to an end in the early 1990s
- 1960: the Sharpeville massacre and the Langa march
- 1976: the Soweto uprising
- 1990: the release of Nelson Mandela and the unbanning of liberation movements.

Look at the picture

1. Who is the man in the picture?
2. What is happening in this picture? Why are the people around him celebrating?
3. What did he do for South Africa?

• Topic 8 Turning points in South African history: 1960, 1976 and 1990 **201**

Figure 5.8 A scan of Text Seven: Introductory page 201

The chapter “Turning points in South African history: 1960, 1976 and 1990” is preceded by the chapter entitled “Turning Points in modern South African history since 1948”, conforming to the chronological frame of history in the Senior Phase. The history after 1960 cannot be understood unless learners get clarity on what went before. The history since 1948 is significant because it focuses on the main apartheid laws; forced removals in Sophiatown and Magopa; the banning of the South African Communist Party; non-violent resistance in South Africa; the ANC programme of action; the role of Albert Luthuli in resistance to apartheid; the Defiance Campaign, including the role of Mahatma Gandhi; the Freedom Charter; the Women’s March and the roles of Helen Joseph and Lilian Ngoyi. These are important historical events and historical figures that created a volcanic environment that would erupt in the years after 1960, altering the course of South African history. It can be said there is progression in the choice of substantive content for history textbooks. When a history of a country is presented, some of its later history cannot be understood unless the earlier history is known.

The “Turning points in South African history: 1960, 1976 and 1990” commences with a photograph of Nelson Mandela and Winnie Madikizela Mandela on his release from prison in 1990, creating a resonance of freedom and democracy. Questions based on the picture request learners to identify the man in the picture and to describe what is happening. Learners are probed for reasons for the celebration of the people and asked about what Mandela did for South Africa. These are key introductory questions to prepare learners for the unfolding of the chapter.

This chapter is divided into three units:

Unit 1: 1960: Sharpeville massacre and Langa March

Unit 2: 1976: Soweto Uprising

Unit 3: 1990: Release of Nelson Mandela and the unbanning of liberation movements

Unit 1: 1960: Sharpeville massacre and Langa March

A word bank at the start of the unit defines ‘minority rights’ and ‘oppressor’ as important introductory concepts. The unit describes the formation of the PAC in 1959, as a spin off from the ANC (established in 1912), as a result of different views around white inclusion and around their choice of supposedly more effective forms of resistance. The inclusion of sources, in the form of Robert Sobukwe’s speeches, form a background into the PAC’s

ideology (Contextualisation). Discussion then shifts to the pass book system established in the 18th century and the resistance activities the ANC and PAC undertook, focusing on PAC leaders Robert Sobukwe and Phillip Kgosana and their leadership activities in the resistance movement.

Unit 2: 1976: Soweto Uprising

This unit focuses on the events of 1950 which resulted in anti-pass resistance. The activities were co-ordinated by the PAC and the ANC. The events in Vanderbijlpark, Evaton, Sharpeville and Langa which eventually led to many being killed and shot by police on 21 March 1960 are described. Sources in the form of photographs and eyewitness accounts add to the contextualisation of these events to build understanding. However, the lack of information accompanying certain sources (provenance) reduces their credibility. Information originating from eyewitness accounts is likely to be subjective, which is why appropriate provenance is deemed essential to the piece of evidence being used to construct a historical account. For example, there are questions about the eyewitness accounts presented by Humphrey Tyler and Ian Berry because they were both employees of Drum, a highly political magazine at the time, carrying its own ideology and interest in servicing a particular type of readership. A magazine normally prints what is appealing to its main audience. This is not to say that their accounts are falsified, but questioning and testing the validity of the source and knowing its author is important to ensure that the motives for the construction of a source are trustworthy and reliable. Reporters are sometimes paid to deliver what the newspaper values as interesting material and often sensationalism sells more copies of the newspaper. An authentic source must be interrogated and evaluated for its authenticity. It is the provenance or the information involved in the construction of a source which drives its authenticity. The information the source presents about the event, incident or person in history is the second contribution to the construction of the narrative, or account, of history. Often the identity of the author of the source can present an objective for its construction. These are the essential elements of history lessons, developing different views of the past and harnessing one of the key constructs of historical thinking: the multi-perspective approach.

This particular textbook also uses the Internet as a source of information four times, and then labels a piece of the information as a 'source', but it is not clear whether it is a

source of information or a historical source. Regardless of whether its content concerns a historical event, there needs to be a categorisation and explanation for learners, since the sources are presented with others that display highly subjective content. How does a learner differentiate between what is fact and what is not? When learners are presented with the question ‘Is the source reliable? Give reasons’, this possibly allows for classroom discussion and justification of the eyewitness accounts, and the teacher then has to ‘fill in the gaps’ for what the learner cannot infer. In the absence of the teacher, if learners use the book by themselves, there is the likelihood of incorrect conclusions being reached. These aspects of sources and their provenance will be studied in greater detail later in the thesis. For the present, it is essential to note that certain anomalies about sources begin to present themselves.

After the presentation of the events of Vanderbijlpark, Evaton, Sharpeville and Langa to the learner, the consequences of the Sharpeville activities are described with references to the suspension of pass laws, the increase in violence, the state of emergency being declared, and the banning of the ANC and PAC in 1960 and some of their leaders exiled. The longer term effect of the Sharpeville incident is identified as the pressure placed on the government to end apartheid by countries outside of South Africa. These countries supported the banned organizations and allowed them access as exiles.

The causes of the Soweto uprising and the rise of Black Consciousness then take centre stage in the discussion. There is a focus on Steve Biko and on the reasons for which the learners of the time took to the street to demonstrate against the language policy. The events of 16 June and the sources presented attempt to contextualise this for the learner, allowing them to consider different perspectives on the same incident and to evaluate it. The longer term consequences for the resistance and repression are discussed, with learners being asked to compare concepts like ‘terrorist’ and ‘freedom fighting’.

Unit 3: 1990: Release of Nelson Mandela and the unbanning of liberation movements

The unit commences with a word bank exemplifying meanings of ‘repealed’, ‘tricameral parliament’ and ‘unbanned’. However, there are a number of other concepts in the unit that would need more explanation and understanding. The unit also features a timeline summarising the events from 1976 to the first democratic election, making the learner

aware of the key events of these years. The reforms of the president elect in 1978, P.W. Botha, the repeal of apartheid laws on marriage, the tri-cameral parliament and the improvement of township conditions, are highlighted. This, however, as shown, was not enough to stop the momentum of the internal resistance and the birth of the trade union COSATU to uphold the rights of the worker in 1985.

The effective use of the first cartoon image of the tricameral parliaments conveys a difficult concept to learners. It is a good way for them to translate a better understanding of the system, and so scaffold historical thinking. In 1983 the United Democratic Front (UDF) was formed with several anti-apartheid organisations joining forces with the ANC. This, together with the external pressure from other countries to boycott South Africa and the end of the Cold War in 1990, resulted in the South African government being unable to justify its repression of the people. Thus, learners are led to the process of democracy, where P.W. Botha was forced to resign and De Klerk was elected. Whilst De Klerk did announce the unbanning of the anti-apartheid organisations, the state of emergency was not lifted and the troops had not left the townships. The negotiations of 1990–1994 and many further violent clashes led to the release of Mandela, the first democratic election and the formation of a new constitution.

Concepts extracted:

- turning points, 1960, 1976, 1990, resistance, apartheid, Sharpsville massacre, Soweto Uprising, unbanning, liberation movements, minority rights, oppressor, Nationalist party, 1948, 1950, ANC, PAC, 1959, 1912, Robert Subukwe, European, domination, anti-white, African, racist, consequences, 18th century, foreigners, Defiance Campaign, Orlando, Soweto, Phillip Kgosana, Western Cape, Vanderbijlpark, Langa, Evaton, Boipatong, Bophelong, dispersed, tear gas, Parliament, Caledon Square, armoured, distinguishing marks, firing blanks, hostility, sten gun (type of rifle gun), warning volley, Durban, editor, chronological, exile, suspended, Cape Town, Cato Manor, state of emergency, justification, sabotage, international pressure, underground, armed wings, Umkhonto we Sizwe (MK), PAC's Poqo (standing alone), uprising, headquarters, Rivonia, Johannesburg, Mandela, Sisulam Govan Mbeki, Black Consciousness, Steve Biko, SASO (South African Student's Organisation), Eastern Cape, politics, Drum magazine, Bantu Education, SASM (South African Student's Movement),

SSRC (Soweto Students Representative Council), barricades, provocation, resolution, retaliation, tear gas, Orlando West Secondary School, Sam Nzima, Hector Petersen, Jimmy Kruger, Sophie Tema, evidence, self-defence, contradict, bias, spiralling, Gugulethu, detention, freedom fighters. reforms, terrorists, repealed, tricameral Parliament, Cold War, Constitution, opinion, townships, cartoonist, activist, confined, investors, ungovernable, internal resistance, external resistance, boycotts, Federation of South African Trade Unions (Fosatu), Congress of South African Trade Unions (COSATU), political protests, United Democratic Front (UDF), democracy, repression, Olympics, regime, sanctions, capitalist, USSR, Berlin Wall fall in 1989, communism, conservative, death penalty, negotiation, autobiography, SACP (South African Communist Party), compromise, constitution, negotiation, right wing, Chris Hani, assassination, Inkatha Freedom Party (IFP), Magnus Malan, Adriaan Vlok, Independent Electoral Commission (IEC), votes, Freedom Charter(1955), sexual orientation, ethnicity, gender, discrimination, repressive.

Time and space:

- The chapter content is located in South Africa. It concerns the time period after the 1948–1960 debacle of apartheid atrocities designed by the National Party. Since the 18th century in the Cape Colony, black and coloured people had been made to carry passes. The different areas all separately conducting anti-pass protests included Vanderbijlpark, Evaton, Sharpeville and Langa. A map contextualises this, showing in magnified form the areas affected. The violent events in South Africa from 1960 to 1976, and the ongoing unrest and violence, brought external pressure to the South African government from other countries around the world. Some of these countries assisted exiled leaders by allowing them access. This is a very important chapter in describing both time and space, as it effectively accompanies the learner to the present time in modern history. It is a time in history when the past and the present merge. It is also a time when the learner has experienced the life and presence of Mandela and some of the liberation movements. The learner is in a position to experience the effects of the past.

- The chapter starts with decontextualised knowledge which is also semantically dense. As the chapter progresses, there is a sense of contextualisation, but learners still have to access and process the vast political terrain of all the years under study. The events and people of the years between 1960 and 1976 may not be part of the learner’s immediate context, but the chapter presents this information in an effective way so that the learner can acquire an understanding.

Procedural concept prompts

Table 5.8 Text Seven: Procedural concept prompts

Procedural Concept	Evidence in Text		
	Weak Evidence	Strong Evidence	No Evidence
Establish historical significance		√	
Use primary source evidence		√	
Identify continuity and change		√	
Analyse cause and consequence		√	
Take historical perspective		√	
Understand moral dimension of historical interpretation		√	

Establish historical significance:

The number of events under study in this chapter increases substantially with events like the incident at Vanderbijlpark, Langa, Evaton, the Sharpeville Massacre, the liberation struggle, its movements and unbanning as well as the release of Nelson Mandela. Learners are drawn into large amounts of history content knowledge that reveals enduring changes as a result of these events which also present many issues in history and contemporary life. This second-order concept is coded as strong for this chapter as learners engage with the many historical issues throughout the chapter.

Use primary source evidence:

There are many sources, some of which are primary. They are photographs, accounts from eye-witnesses, maps and posters. The difficulty with some of them lies in that they are not sufficiently contextualised. Learners are required to deal with the sources, not only in terms of the information they provide but they also are asked to engage with issues of reliability and purpose and so construct essays or accounts of an event. For example, they are asked to describe what happened on the day of the Sharpeville

massacre in an essay, using the sources given in the textbook. The essay is expected to follow a chronological order and the learner is expected to conclude the essay commenting on why the Sharpeville massacre is important in South Africa's history. This particular activity supports a strong coding of the second-order concept of primary source evidence as well as for historical significance.

Identify continuity and change:

This chapter presents a large time study of South African history. There are a number of events that point to change and learners are required to engage in various activities that deal with each historical event. The formation of the liberation movements are indicative of change, of frustration with events after the apartheid government began advancing laws. Learners are asked to think about whether the ANC and PAC were right to change their methods after Sharpeville. Learners can only answer this question in the light of their historical knowledge of the incident itself. There are other examples in the chapter that show the rate of change, however there is not enough room to cover all. There is sufficient reason to code this second-order concept strongly in its presence within the chapter.

Analyse cause and consequence:

There are numerous events under study in this chapter and learners engage with each. Within this textbook, there are sub-headings like 'Short-term consequences' and 'Longer-term consequences' which make visible to learners what they are. Sharpeville had short-term consequences in the form of Pass laws being suspended, the violence which erupted, the state of emergency which was declared and the banning of the ANC and PAC. It also had longer-term consequences which included the effects of Sharpeville on other countries, even internationally, the effects on the ANC and the PAC following their ban. The learner is expected to work through activities on both long and short-term consequences to get a sense of what they were and how they unfolded. In so doing get a perspective of the causes and consequences of the massacre. A strong instance of this coding was presented for this second-order concept.

Take historical perspectives:

At various points in the textbook, learners are asked to present a perspective on the historical event. For example, they are asked to think about whether the government was

justified in declaring a state of emergency after the massacre. Learners are also expected to offer an explanation for their answer. This would require a substantial knowledge of the causes of the massacre, which would mean an understanding of previous history up to this point. Learners are also required to think about whether the ANC and PAC were right to change their methods after the Sharpeville massacre. This would also involve taking a perspective after considering the history that preceded the banning, details of the massacre itself as well as the effects of the ban. There is strong evidence of this second-order concept at work in this chapter because learners are frequently called upon to offer a perspective on historical phenomena.

Understand the moral dimension of historical interpretation:

Learners are drawn into almost every activity to ‘think’ about some event or process that requires a perspective to be offered. These perspectives can only be offered in terms of the content knowledge the learner acquires from previous learning and understanding. Some require an historical perspective but there are those that require moral insight. For example, learners are asked to think about whether the the ANC and PAC were right to change their methods from peaceful protest to violence, forming the armed wing Umkhonto we Sizwe (MK) which means ‘Spear of the Nation’. This requires both a historical perspective as well as moral insight into whether violence was the answer to an already troubled nation. Further on in the chapter, learners are asked whether they would have taken part in the protests against apartheid had they been living in the townships at that time. Here again learners would be required to draw an historical perspective as well as a moral perspective. I have given this second-order concept a strong placement within this chapter as a result of the call for moral insight.

Overall perceptions:

This chapter focuses on how people in South Africa resisted apartheid and how apartheid finally came to an end in the 1990s. It specifically highlights the incidents of 1960, 1976 and 1990: the Sharpeville massacre and the Langa march, the Soweto Uprising, the release of Nelson Mandela and the unbanning of liberation movements. It should be noted that this chapter falls immediately after the unit which deals with the “Turning points in modern South African history since 1948”, which, chronologically, deals with many issues considered important for the understanding of the present unit. The idea of

progression in the time periods, therefore, is not compromised. The history in the Senior Phase is chronologically developed, contributing to the idea of progression in time. So the choice of the history period from 1960 to 1990 was a conscious, deliberate choice to shift the analysis to a time period of dawning democracy.

5.4 Key findings and discussion

The curriculum and the textbooks attempt to capture salient and critical history in a chronological manner. As mentioned earlier, these choices are influenced by a political process and by what is deemed to be important and salient for study in a particular grade or phase. The breadth of history in the years under study in the textbooks is wide and the number of significant historical events is expansive. It is impossible to present all of the events and all the people who contributed to this period. It is, therefore, a strict process that includes certain material with the exclusion of some. That which is selected then must develop understanding in the learners in such a manner that the story of South Africa can be grasped and can be interpreted in different ways. History, it is argued, develops multi-perspectives, so it is expected that the presentation of the past will engender fruitful and engaging interpretations about the past. In the sampled textbooks, it appears as though various important stories about South Africa's people and its past have been told. However, it appears that the multi-perspective approach is not clear in the earlier grades. It also clear that chronology as a principle of order in the curriculum does not feature in the lower grades of 3 to 5. Chronology appears to feature only significantly in Grade 6. It does, however, become entrenched later in Grades 7–9.

There is also a steady increase in abstract terminology as the number of facts or content for study increases. This can be viewed in the number of pages in each chapter dedicated to different topics of history. It is noticeable that the print becomes small and dense as the grades advance. The design of the text is effective and clear, because the space on each page is allocated to a careful balance of colourful, eye-catching material along with writing. The visual element is highly commendable, as posters, different types of maps, photographs in black and white and colour and cartoons make these textbooks interesting and engaging. As the textbooks advance in the grades, so does the inclusion of more complex visual data, like political cartoons. This is perhaps due to the fact that younger learners may not have the necessary skills to deconstruct these kinds of images.

What is apparent, is a clear building process using the important constituent parts. As the grades progress, there is an increase in the number of concepts, both first-order and second-order. The concepts extracted from each book from Grade 3 to Grade 9 progress in the number and in semantic density. The learner is shifted from the study of his own immediate environment to the local environment. The study then progresses to include spaces outside the local environment of the learner to include provinces outside of the learners own. Progression in space is noted in the study of other countries around the world. The arrival of settlers in South Africa not only created a new history, but shaped the circumstances and events we call history. Their relationships with the natives also created cause for more events and shared experiences, as well as formed multiple perspectives in the history. They also form part of the participants of history, which increases across the years under study. The participants can be generalised in their collective names such as 'Boers' or 'Afrikaners', or they can be specific such as 'Albert Luthuli' and 'Nelson Mandela'. Both the generalised participants and the specific people under study increase in the grade continuum.

The blocks of learning are created in small increments, event by event, with increasing numbers of people that construct a story of the past. There is a definite increase in substantive knowledge or concepts (the number of different people and events, the years under study are expansive, as well as the nature of knowledge). As the grades progress, a gradual engagement with all of the second-order concepts results in the language becoming increasingly dense and abstract. The learners are taken from their immediate and local environment (context-bound) to areas outside of their town, city, province and country (decontextualized learning). Individual people are studied in depth while some are recognised in their groups, like the San. Depending on the role of the group or the individual person concerned, and how significant their interactions were, they are remembered by history. History is seen as according due respect to its participants, particularly the heroes of the political struggle for democracy.

In the earlier grades, the theme of history 'About me' is very localised and general, perhaps even considered as everyday knowledge. Later, as history becomes more in-depth and specialised, as in the theme 'History of South Africa', there is the advent of democratic heroes who contributed to the struggle of apartheid. Information about the

struggle becomes intensive in later years, highlighting the nature of the events leading to the collapse of apartheid and the advent of democracy. Factors like the causes and effects of an event do not form part of early history knowledge but there is evidence of its eventual incorporation in higher grades. There is strong evidence of a gradual engagement with all the second-order concepts.

It is observable from the tables showing the procedural prompts that there is a slow and gradual engagement with the second-order concepts. Initially the concept of historical significance is weakly evident due to the fact that there is hardly any engagement with historical events in the earlier years. However, this concept becomes entrenched in later years of the grade continuum when a number of events in a particular theme are studied. The use of primary source evidence is also gradual with the types of source being unclear. The sources are sometimes used in generic ways and at other times they become disciplinary. Some sources are insufficiently contextualised. The concepts of cause and effect and change and continuity are only more apparent later in the grade continuum. Historical significance and taking a moral perspective are second-order concepts that are more demanding, requiring greater skill and maturity. This is perhaps why there appears to be a gradual engagement and entrenchment later in the grade continuum.

5.5 Conclusion

In this chapter I provided an initial reflection on the overall appearance and content of each chapter. This was an opportunity to note key differences among the texts and to describe these differences in terms of the categories noted, namely, time, space and concepts. Some of these differences were observed in the type of content, the density of the information presented and in the types of concept learners are required to engage with in the content. This view provided much insight into how both substantive and procedural knowledge are engaged with by the textbooks under study. The degree of change in the substantive dimension is observed in the complexity and details of an increasingly expansive content which is also governed by an increasingly chronological framework. In contrast, any change in the procedural dimension seems to be linked to the increasing demand in the type of skill embedded in the task. This aspect is investigated in greater detail in forthcoming chapters. It also appears that some second-order concepts have a certain complexity to their nature, such as developing an historical perspective. The

content and the way the theme is presented can allow engagement with any of these concepts. However, there are some that seem to be encountered later in the grade continuum, indicating that there is a certain amount of complexity associated with each of them.

CHAPTER 6

LEVEL TWO – MIXED METHODS: GENRE, CONCEPTS AND SKILLS

6.1 Introduction

This chapter focuses on the analysis of text structure and genre, specific concepts and skills taught, the kind of reading and written texts learners are required to engage with and the number and nature of nominalisations in each chapter of the selected textbooks. The analysis of these specific categories provides insight into how text writers manipulate the written word into the craft of the historian. A view is obtained, albeit a glimpse, of particular approaches within textbooks that signal learner historical thinking.

Engaged with first, is how this level of analysis is influenced by theory and its relevance to the curriculum. Then to structure this level of analysis, parallel methodological tools that enable concept-mapping and genre identification are presented, both of which incrementally speak about progression. The work of Coffin (2006) and Martin (2007) is presented in detail in the theoretical framework, and here an analytical tool is created by merging their ideas. This tool is used to analyse each chapter of the sampled textbooks.

6.2 Links with theory

The choice of these categories is influenced by Coffin's (2006a) detailed study of historical texts which demonstrates that writing about the past requires different genres, and lexical and grammatical structures. From her study, language emerged as a powerful tool for making meaning in historical writing. In contrast to studies which have denied that history has a specialised language, Coffin's (2006a) intensive and wide-ranging analysis of texts of secondary school history augments the understanding on how to develop student's historical understanding. Coffin (2006a, p. 12) places school history as the context where she provides a rich description of how language works to make historical meaning, primarily in students' written texts, highlighting that over the last two decades, "the ability to read and write at different levels of sophistication has become an increasing concern for Western governments".

Coffin (2006a) argues that there is still relatively little understanding of the precise nature of specialised literacies and the different types of reading and writing demands made on students in different subject areas and on citizens in different workplaces and social institutions. She contends that learners of history produce many different types of text, and so they need to understand how texts are structured in order to produce historical writing that meets the needs of different types of historical enquiry. Thus, learners make a selection or organisation of relevant material while making effective use of dates and terms in different texts. Coffin (2006a) elucidates that history teachers should consider how to model the structure of different types of writing in history to enable students to be increasingly independent. This clarification has sweeping implications for textbook writers and teachers, as the way the writing is conceived, comprehended and reproduced can effectually motivate learners to ‘think’ in history in particular ways. What is inferred is a very structured model of a thinking process.

6.3 Relevance to the curriculum

This level of analysis, therefore, considers how textbook writers incorporate text structure and genres as they progress across the grades. The specific concepts drawn out of the text, text production (or what pupils are requested to read and write about the topic) and nominalisations across the texts in the various grades are teased out from the analysis. The guidelines for the Curriculum and Assessment Policy Statement (CAPS) are considered specific to history as they constitute the primary guide for textbook formulation. As a frame, the Curriculum and Assessment Policy Statement (NCS), for Grades 7–9 in the social sciences curriculum, introduces learners to a world beyond their everyday realities (2011, p. 8). The curriculum is said to recognise depth of knowledge, where real knowledge demands that learners develop expertise and confidence as a result of in-depth learning. It states that learners are trained to speculate, debate, make connections, to select, to prioritise and to persist in tackling real issues and important questions. The policy document also recognises that learners should be encouraged to ask questions such as: Who? Where? What? Why? When? How? Should? Could? Is? Are?, and, by the time they reach Senior Phase: If? It further recognises that language is an important element for both history and geography and that those different forms of text (oral, written and visual) are central to both disciplines. That learning takes place through interaction with these texts is an added recognition. Each teacher is recognised as a

language teacher. Thus, writing is a skill that is developed through these two subjects. The policy document advises that learners should write regularly, with a clear progression in length and complexity through the grades. It clearly stipulates the CAPS language document's specified levels of requirement for writing that should be consulted throughout (p. 8). The unification of both these policy documents for the purpose of teaching history signifies that language is a vital mediator in history learning.

It is argued that most language teachers understand the fundamental difference between academic language and informal, interactive or everyday language. In other words, they can distinguish between that which is formal and that which arises spontaneously or from face to face interaction. Teachers aim to develop language proficiency in their students regardless of the learners' varying levels of language competency. Thus, teaching can be adapted to the proficiency level of learners and teachers can use any type of language that will allow learners to understand and access the content. For this, semantically dense texts can be deconstructed using more everyday language to simplify the texts. Textbooks, however, cannot gauge learner language proficiency, so their content, language and presentation are directed according to a standardised expectation of learner levels. There may be instances where language in the text is highly academic and too complex for learners who battle with both language and concepts. These language differences are described in Cummins' (1979) notions of Cognitive Academic Language Proficiency (CALP) and Basic Interpersonal Communication Skills (BICS) (cited in Coffin, 2006b). These notions allow a way of describing language that can separate how the two uses of language (CALPS and BICS) differ – both in form and function. Derewianka and Jones (2008) add that such variations in the orientation to language, explored in greater detail by SFL, can be both useful and relevant to researchers, applied linguists and teachers, as it provides tools to

- a) analyse the ways in which language builds academic knowledge in different school subjects and
- b) use such analysis to inform teaching-learning activities and strategies.

6.4 Influence of SFL

Coffin (2006b) claims that the theoretical lens of SFL allowed her to recognise language as a central tool for thinking with and is a vigorous meaning-making resource. It can be

inferred then, that language is possibly also the central tool for *historical thinking* and that any interaction with written texts is mediated by the language and its potential for meaning-making. As SFL provides a set of labels for describing texts and clauses in functional terms, it enables teachers to make visible and explicit to students (where relevant) how texts make meaning, both in the texts that students need to read and in the texts they need to write as they move across the curriculum and through schooling.

In Schleppegrell's (2012) article, for example, a narrative is seen as using different kinds of grammatical resources as the text unfolds (for example, more active doing processes in the main part of the story and more reflective being and sensing processes in the final evaluative stage). By examining the narrative text through the lens of SFL, teachers can pinpoint how grammar functions to make different kinds of meaning at different points in a text and by devising activities that bring out the relationship between grammar and meaning they can orient students to grammar as a resource for understanding and producing texts. The tools of SFL have been used by a number of researchers and educators in order to systematically describe and explain how and why different subject areas (such as history, science or English) use grammar in quite distinct ways to build their different understandings of and different orientations to the natural and social world.

Nominalisation is one of the language resources used in this study to understand how some texts present decontextualised language of academic knowledge. SFL seeks to describe how language choices are influenced by particular factors in the context: 'what's going on?' (The field or subject-matter), 'who's involved?' (the tenor), and 'what channel of communication?' (the mode). Together these form the register. To these, Martin (in Christie & Martin 1997) adds 'what's the social purpose?' (Genre), which describes how a text unfolds in stages. According to Coffin (2006b, p. 52), "*mode* is hooked up to the textual metafunction, which enables users to package and create a flow of information. Nominalisation thus is one of the areas of grammar associated with textual meaning, a process whereby events (normally expressed as verbs) and logical relations (normally expressed as logical connectors) are packaged as nouns". For example: 'The land was annexed by the British' becomes 'the annexation of the land by the British'; 'Liberate' becomes liberation and 'exploit' becomes exploitation.

Nominalisation effectively increases the abstraction and density of a text.

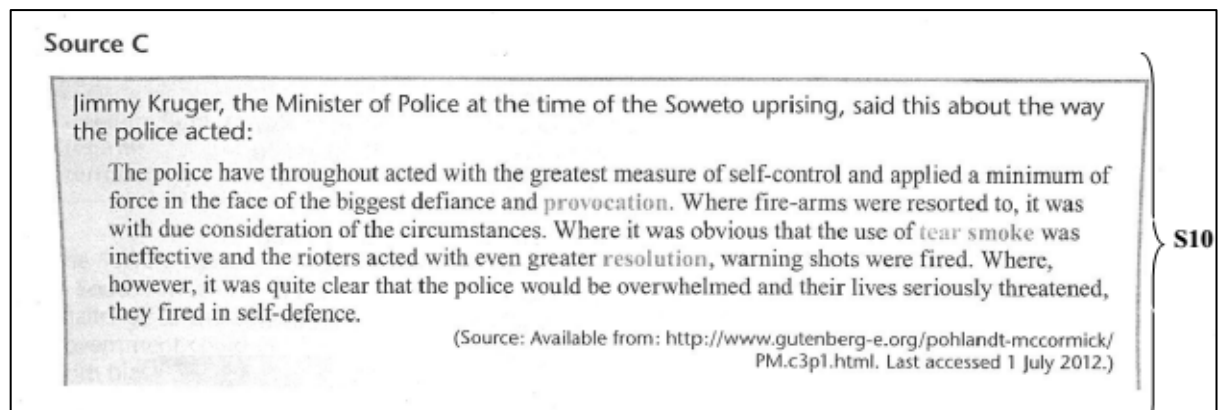


Figure 6.1 A scan of Text Seven: page 217, showing how a text can become dense and abstract

In Figure 6.1, there is a visible increase in the density and abstraction of the text. ‘Defiance’ is used instead of ‘defy’, ‘provocation’ instead of ‘provoke’, ‘consideration’ instead of ‘consider’ and ‘resolution’ instead of ‘resolve’. Such writing would necessitate a certain type of reader that can not only identify the word, but can also grasp its meaning in the context.

Language and genre seem to have intersecting influences on learners’ different development phases. In terms of writing development, the study by Christie and Derewianka (2008) indicated that the movement can be observed from common sense to uncommon sense as well as from immediate to abstraction, from simple to more complex. The historical genres are mainly divided into two groups; the chronological group consists of recounts, empathetic autobiographies, biographical recounts and historical recounts as well as accounts, while the non-chronological genres consist of site and period studies (Christie & Derwianka, 2008). Schleppegrell (2012) refers to earlier studies that have concluded that the trajectory of writing development from common sense to uncommon sense, from immediate to generalisation and then to abstraction is observed in history genres. Students at a certain level of maturity start using diversified ways to realize attitudinal lexis and grammatical metaphor; in addition, the processes they exploit become diverse and specialised. According to Greer (1988, cited in Schleppegrell, 2012), writing has specific characteristics which tie it to relevant subjects and allows people to learn to think and acquire meaning. Writing in history therefore, is expected to reflect disciplinary thinking, where arguments are constructed and conclusions are reached through the use of evidence.

Autobiographical texts are generally presented in writing mode even though some of the written language appears in ‘spoken-like’ language (such as the use of ‘I’ and the absence of abstract nouns). In school history, autobiographical recounts are typically written in the first year of schooling (or in primary schooling) and, as a result, they have a relatively simple style. The lexical density (i.e. the number of lexical items per clause) is related to age development and is often low for written language. In the sample text, nominal groups are comparatively short and simple (e.g. I, my birthday) and there is virtually no use of nominalisations (*ibid*).

According to Christie and Derewianka (2008), children and teenagers use language differently in their production of narratives and recounts. While children use simple clauses to get the message through, their responses may not necessarily include evaluation and argument. Teenagers, on the other hand, display more complex clause combinations and their responses include evaluation of situations and their text is more organised and structured. The theorist Bernstein (1975, cited in Christie & Derewianka, 2008) attributes these linguistic differences to the different knowledge structures that he argues are operative in any level of development. These he identifies as common sense and uncommon sense knowledge structures operating in different developmental phases. Furthermore, Christie and Derewianka (2008) highlight that the teenage use of clause embedding is the first step toward abstraction and/or grammatical metaphor (citing Halliday, 1985). Later, teenagers start exercising experiential metaphors and construct the logical type to construe causality within a clause, using verbs, prepositional phrases and nouns (*ibid*).

According to Martin (in Christie & Martin, 1997) there are historical genres which interpret, explain, argue and debate historical events (p. 58). Genres can also be classified as moving from uncommon sense to common sense, playing out in autobiographical recounts to biographical recounts, to factorial explanation, consequential explanation, exposition and challenge towards multi-sided discussion (p. 59). The genres seem to unfold in some chronological pattern. In a study by Christie and Martin (1997), six texts from different individuals were selected according to their age and they revealed that there is a substantial difference between pre-adolescent and mid-adolescent construction of meaning in the observed genres. While the younger group wrote simpler texts with less abstraction, the older group managed to reach abstraction to a great extent through the use

of more complex nominal groups and grammatical metaphor. All the texts investigated were broken down into stages and the relationship between linguistic resources used in each stage was presented (*ibid*). Christie and Martin (1997) claimed that experiential/investigative genres require fewer attitudinal expressions, while field studies encourage the use of attitudinal lexis to a greater extent. They further described how interpretive genres, classification, description, explanation and discussion develop in student texts from Australian primary and secondary schools. They maintained that, when analysing texts produced by students of different ages, most of those texts gather around report and explanation in science as a school subject. Report and explanation are two significant genres in apprenticing the young scientist into the field. The students commence composing argumentation and discussion essays at a later developmental phase. This could perhaps also be true for the young historian. The patterns described by theorists show that there is a possible way to describe genre advancement in texts. The following section sets the stage for a way to classify genres and information within them. The information that comes out of this view can develop an understanding of genres and language.

6.5 The Construction of parallel methodological tools (A and B)

In this section, I devise the term ‘concept-mapping’ as a method to capture all new words and knowledge to get a sense of how they appear in text and then use the data to observe any variations or changes through the grades. Concept-mapping is used to probe below the surface in order to extract ‘sub-text’ value and detail. I wanted to get an overview or ‘bird’s eye’ reflection on what types of text the learners are required to read and write, which concepts and skills are specifically taught through the text and more specifically what genres or ‘text-structure’ is adopted and how nominalised these texts are. I used Tool B to capture the types of text used in the textbooks. This selection was to get a sense of how the categories are effectively administered by the textbook writers to convey advancement of grades and material to be learnt and so develop progression in historical understanding.

Concept-mapping enabled notes to be taken of the observations in textbook content. These maps were grouped together and similar information was tabularised. Within the maps, the allocated segments of information are represented on tables. Meaning can be deconstructed into a quantitative output from the nominalisation segments. The tables

facilitate observation in trends and patterns, as they are slotted side by side and comparisons are easily identifiable across the seven textbooks. An in-depth analysis of the groups/segments yielded patterns that make it possible to explain the phenomenon of progression. These tables allow for a rich discussion to follow on how each of the categories show progression.

Tool A: Concept-mapping involves identifying and listing of the following categories:

1. Reading: This category includes all the types of content learners are required to read. Such content denotes all details on a page in the textbook that learners are required to read. These are classified into specific clusters such as text types like maps or diagrams, processes, events and topics.
2. Writing: This category includes the types of writing learners are required to produce. It includes text types, posters, diagrams, maps, processes, event description, paragraphs and essays.
3. Topic coverage: The core of the map describing the content of the chapter.
4. Nominalisation: The number of nominalised terms which are also listed in the chapter.
5. Substantive concepts specifically taught: This category includes the new terminology, concepts and ideas specifically taught or introduced in the text. This refers to the substantive concepts that are introduced in text. It engages with any new knowledge in the form of a new word, new concept, event or any new information that was not previously engaged with in the text. Learners engage with this information for the first time.
6. Skills: Those skills which the text encourages learners to develop by engaging in text activities including both generic and procedural skills. Source-based investigation for instance involves a whole range of skills which includes generic skills of reading, extraction, writing and second-order skills of weighing evidence. Comparing reliability in sources, for instance, is a second-order skill while comparing the colours in old and new photographs is not.

Tool A is crafted so as to get a sense of what children are reading in the textbook and then what they are required to write. All the information on a page in a chapter cannot be included in this tool so it is essential to ‘cluster’ together information in the text to signal how it appears and what kinds of information is read. The ‘Reading’ section thus includes

a variety of clusters that denote what the learner is actually reading. This included topics, process, study of events, text types like maps, diagrams, posters, photographs, pictures etc. In the ‘reading’ section it is possible to gauge what kind of format the text is presented in and to determine the types of genres engaged with. Once the clustering of information in each grade is completed, then they are placed on tables to compare how the clusters compare across the grades, showing how each is different and how they advance.

Similarly, the ‘Writing’ section is mapped by examining the text and finding what learners are required to write, what types of formats they are required to take and finally what genre types they fit. The information from all grades are tabulated to note patterns, advancement or differences.

The section on ‘Concepts specifically taught’ are new data in the form of words (semantically dense), substantive or subject-specific words.

The skills that learners acquire from engagement with each text are many and difficult to record. Each grade requires reading, writing, identifying, comparing, explanation and other common skills. Therefore, in the ‘Skills’ section, I listed skills that were inferred and where skills were repeated, I did not record again. Some activities, like a source-based activity (which requires an engagement with primary sources, which is a second order concept) within the text involved a variety of generic skills which required, again, reading, writing and explanation or contestation of its reliability. In such cases I recorded ‘source-based investigation’ to cover those skills. The idea was to log all the skills on a map so that when grades were placed together on a table, I would be able to observe trends, similarities, differences and any advancement or progression.

Tool A was crafted for the purpose of observing progression, if any, and since there were no studies in history to emulate, the technique appeared to be effective as it allowed me to see important how skills developed across each grade.

Tool B: The genre type is identified by combining the typology of history genres (Figure 2.1) and the learner pathway in Factoring modernist history as genre (Table 2.6) (Martin, 2007, p. 57) in Table 6.1. This allowed genres to be classified according to the type that appeared in the textbooks.

Table 6.1 Figuring history as genre (learner pathway)

<i>Genre Type</i>	<i>Alternative Names or Sub-genre types</i>	<i>Informal Description</i>	<i>Learner Pathway</i>
Autobiographical Recount: One-sided or first person	} Recording or Explaining Genre	- the story of my life [oral history]	Common Sense ↓ Uncommon Sense
Biographical Recount: Third person/Alternative side		- the story of someone else's life	
Historical Account: Explaining/Argumentative/ Interpretation Genre Many people One-sided and multi-sided perspective	Factorial Explanation	- complexifying the notion of what leads on to what	
	Consequential Explanation	- complexifying notion of what leads on from what	
	Exposition	- problematic interpretation that needs justification	
	Multi-sided Perspective	- evaluating conflicting viewpoints - personal rebuttal	

6.6 Findings of the concept-mapping analysis

Against this background and using the tools represented above, I constructed the following concept-maps of each chapter. This section presents the data represented in concept maps Figures 6.2 – 6.9. The types of reading and writing genre that are required of learners, the concepts, nominalisations, and genre types are presented in Tables 6.2 – 6.7. In Section 6.7, a discussion of these data is provided.

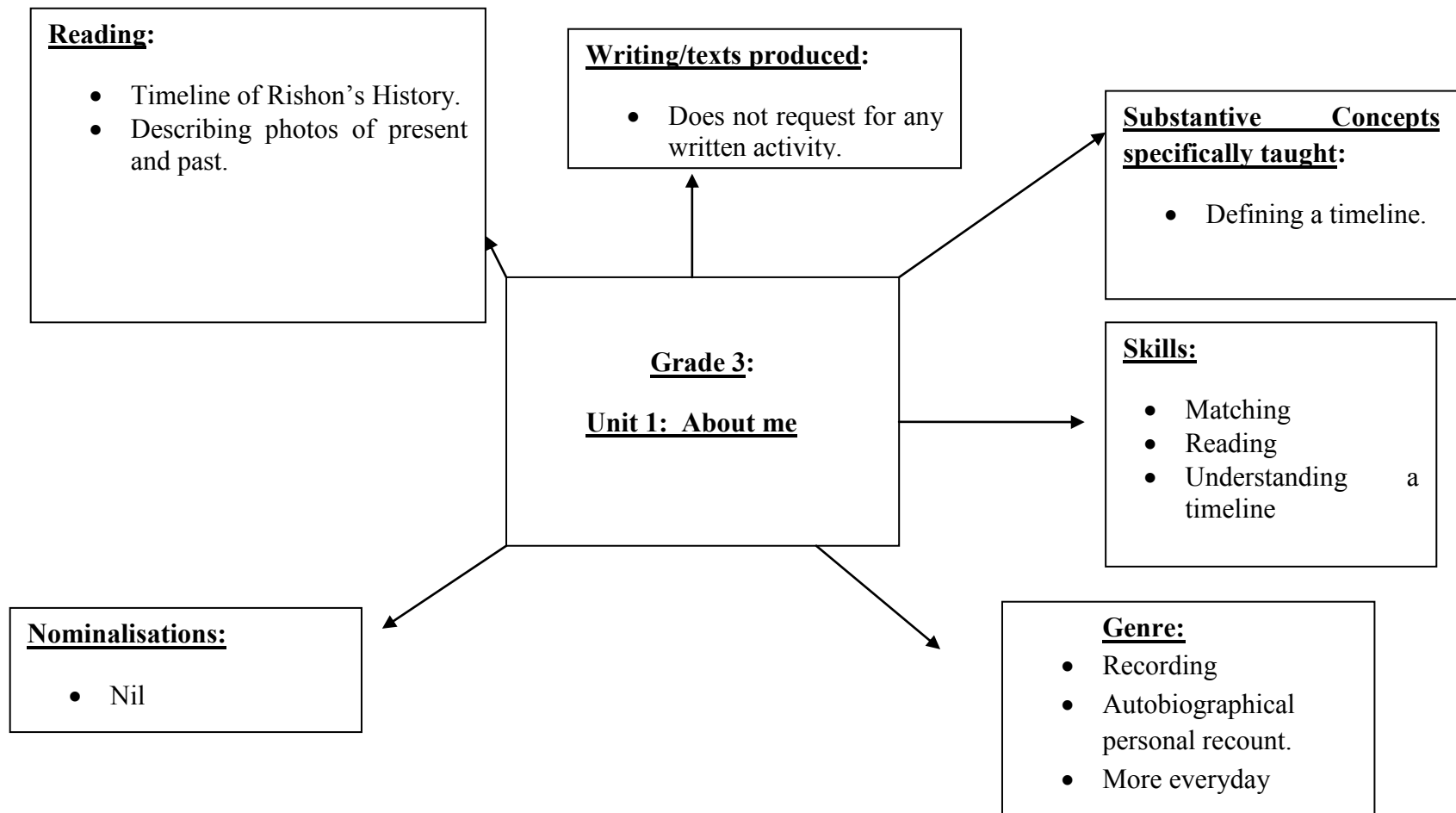


Figure 6.2 Map 1 of Text One (Grade 3)

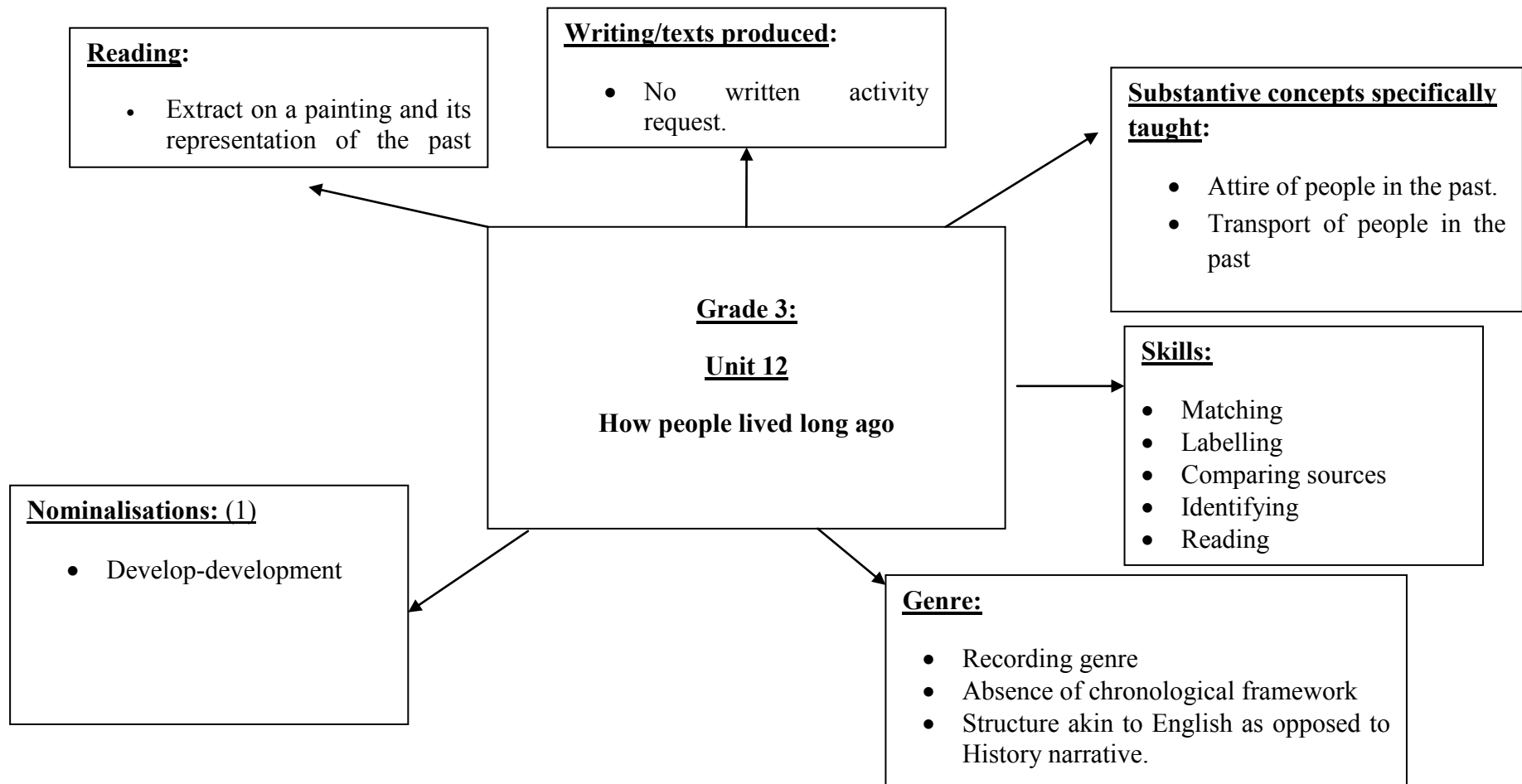


Figure 6.3 Map 2 of Text One (Grade 3)

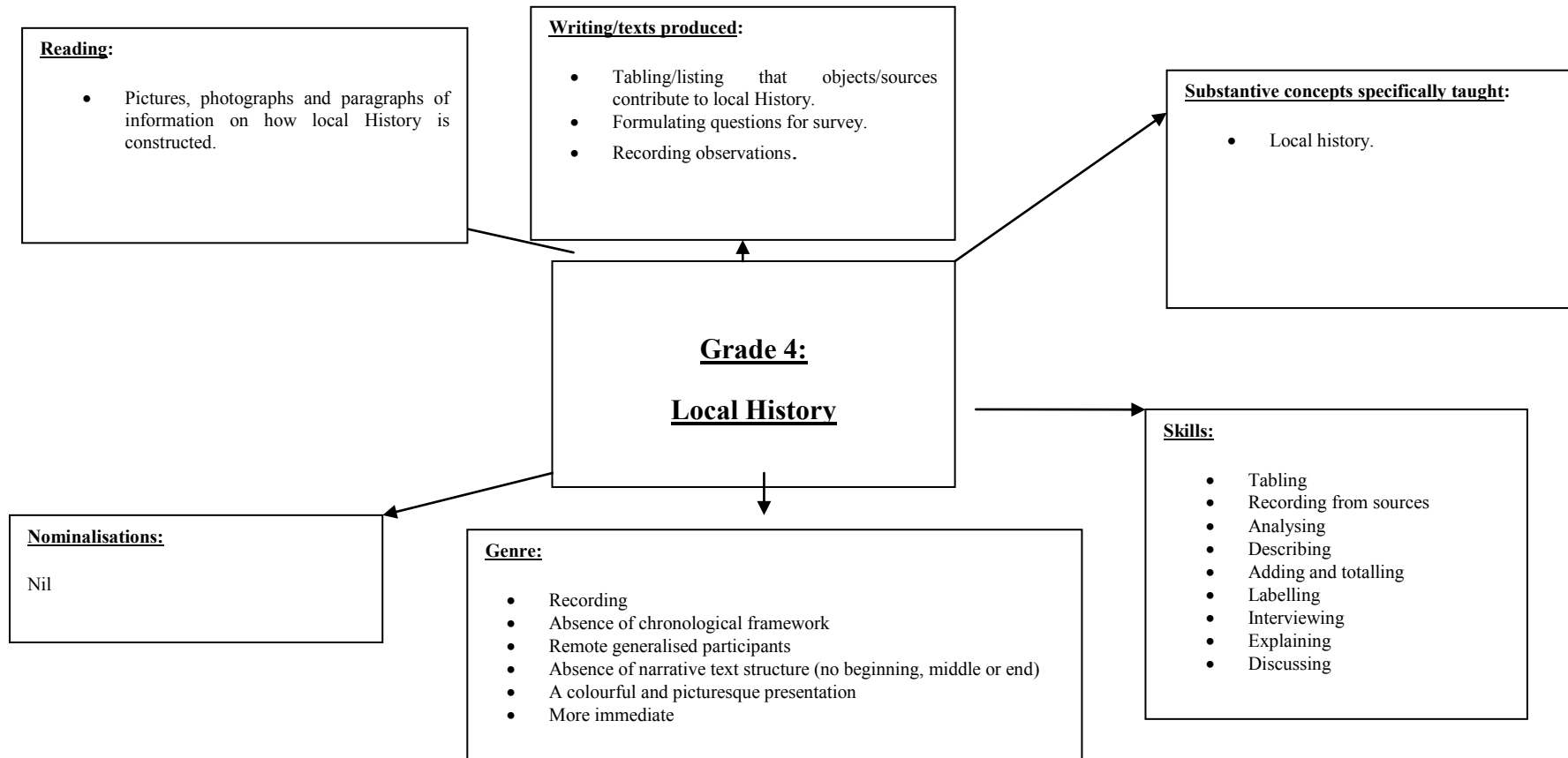


Figure 6.4 Map 1 of Text Two (Grade 4)

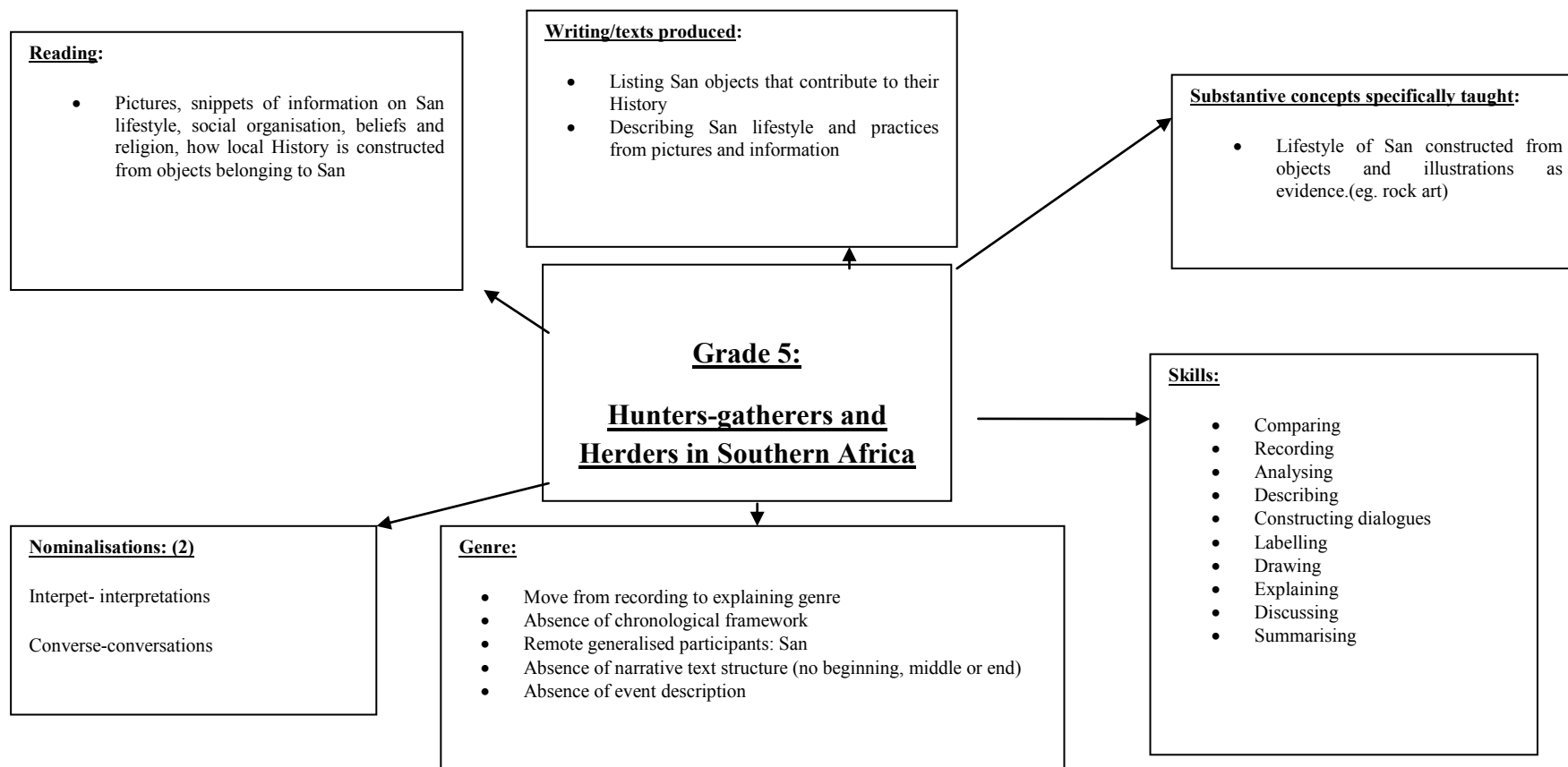


Figure 6.5 Map 1 of Text Three (Grade 5)

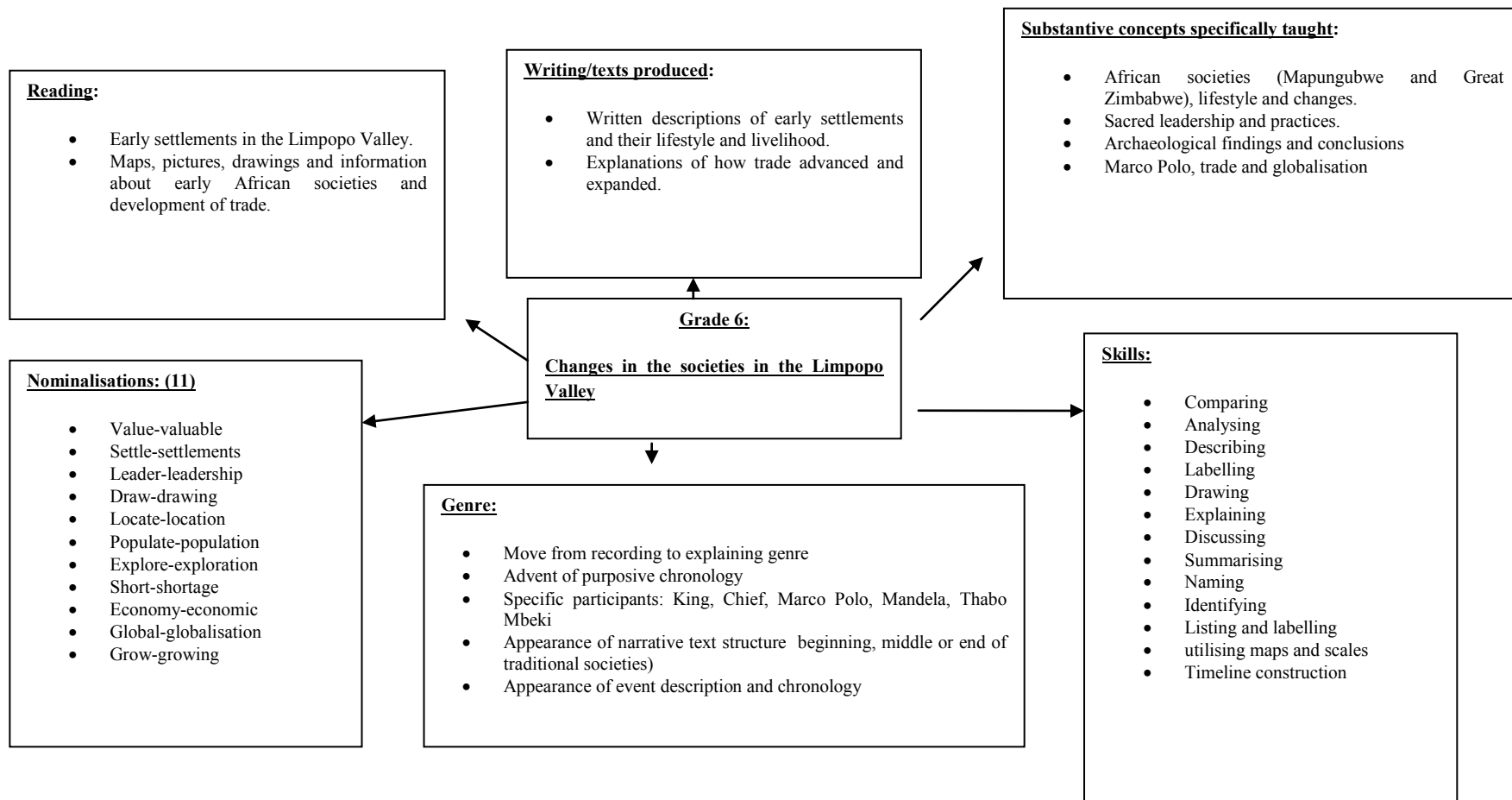


Figure 6.6 Map 1 of Text Four (Grade 6)

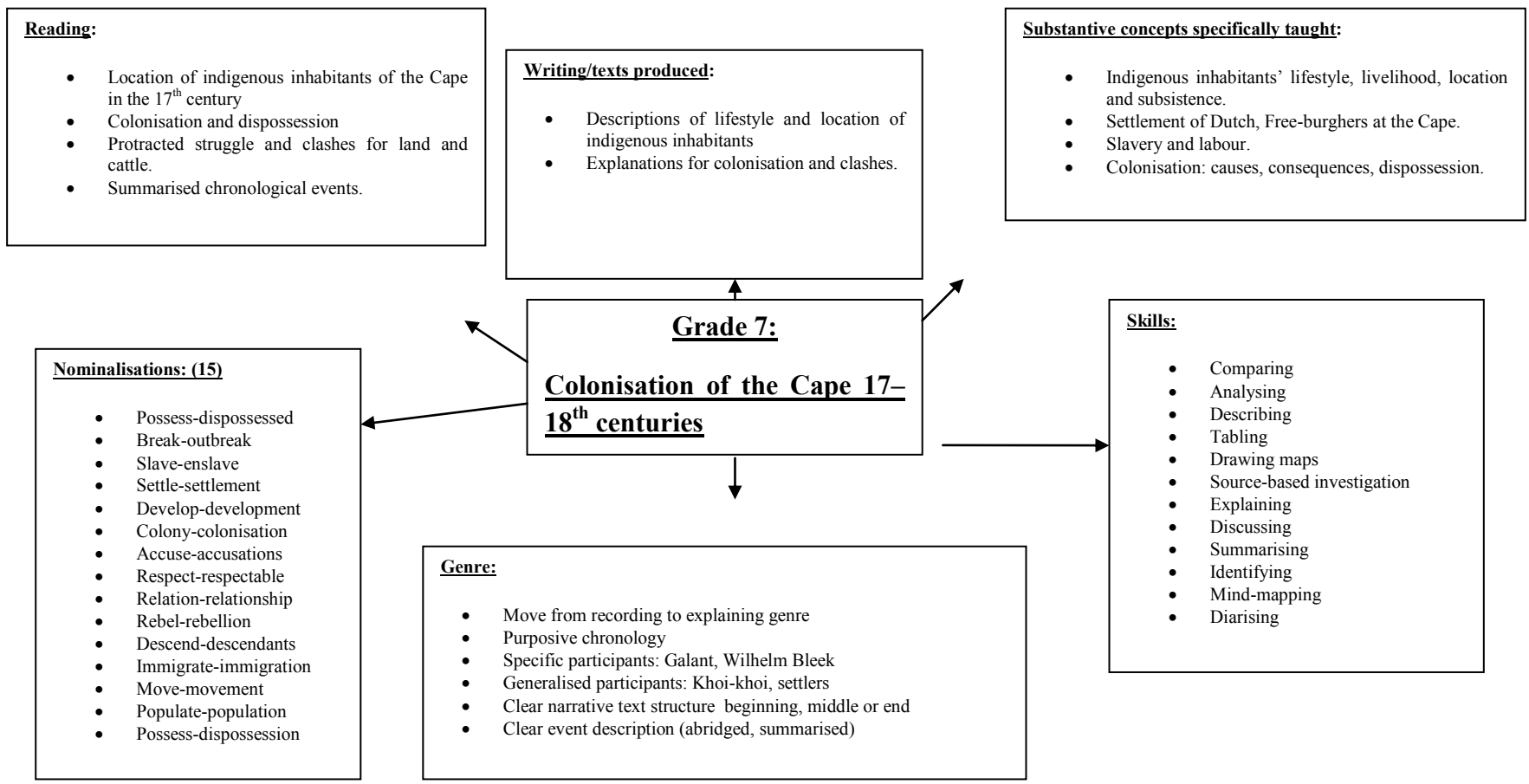


Figure 6.7 Map 1 of Text Five (Grade)

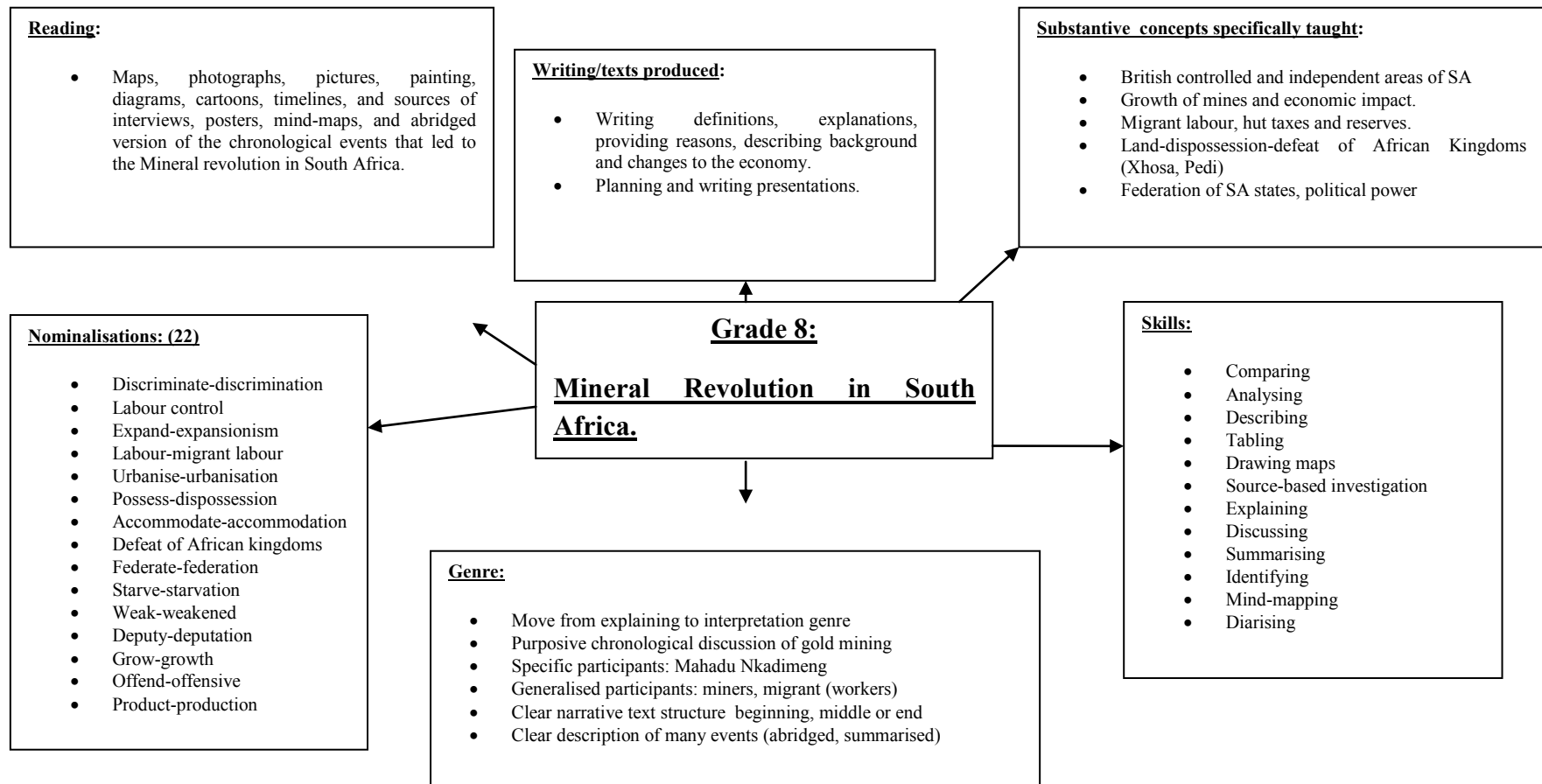


Figure 6.8 Map 1 of Text Six (Grade 8)

Nominalisations Continued:

- Recruit-recruitment
- Control of work
- Explain-explanation
- Erode-erosion
- Treat-treatment
- Resist-resistance
- Power-powerful

Skills continued:

- Creating timelines
- Poster-planning and presenting
- Listing
- Sequencing gold mining activities
- Interpreting evidence.

Figure 6.8 Map 1 of Text Six (Grade 8) continued

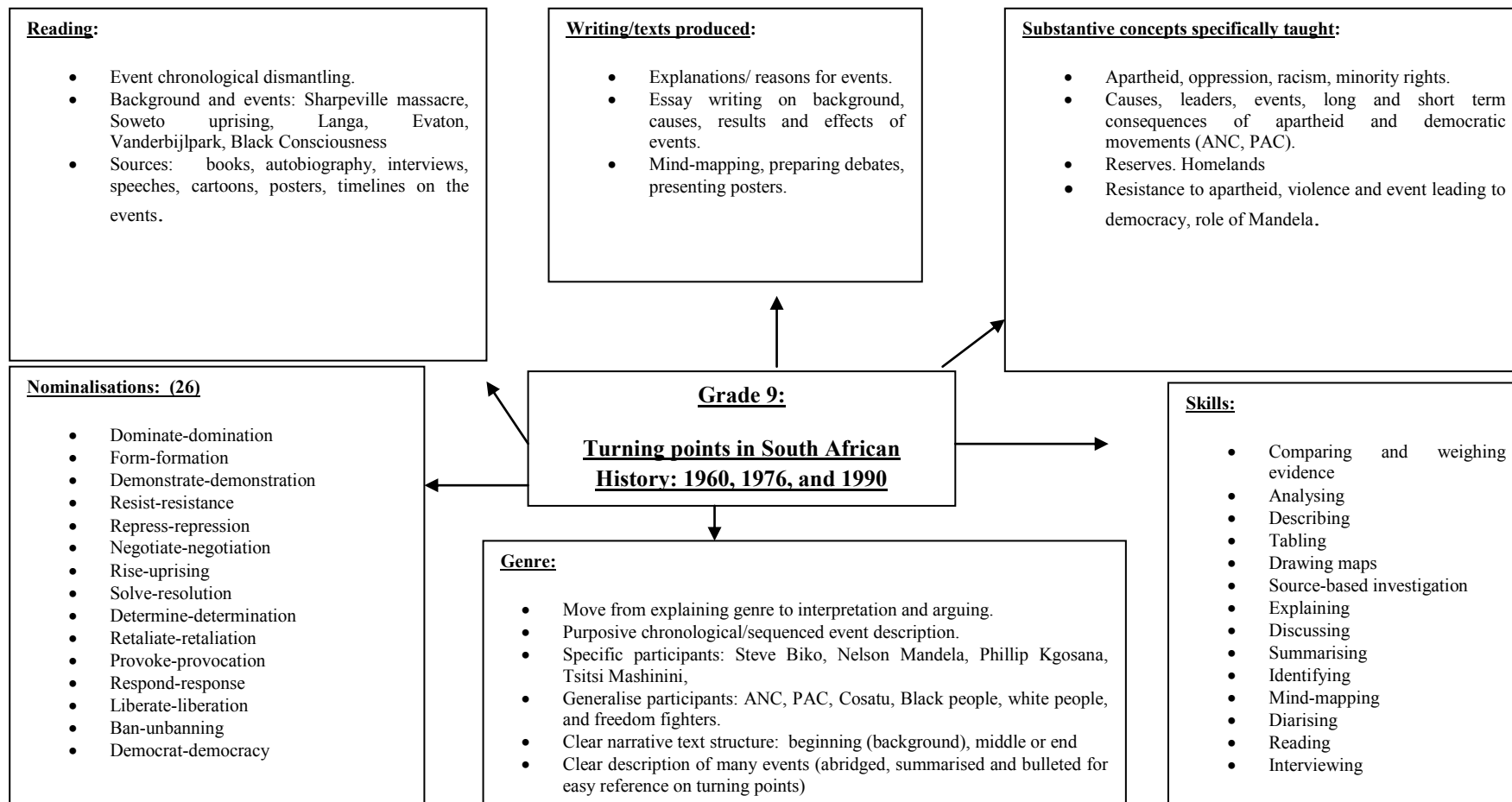


Figure 6.9 Map 1 of Text Seven (Grade 9)

Nominalisations Continued:

Situate-situation

Define-definition

Govern-ungovernable

Move-movement

Organise-organisation

Employ-employment

Federal-federated

Skills continued:

- Debating
- Arguing
- Formulating responses
- Compiling essays
- Designing and producing posters
- Assessing source reliability
- Detecting bias

Figure 6.9 Map 1 of Text Seven (Grade 9) continued

Table 6.2 Visual and text data to be read in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> - Timeline of Rishon’s history - Photos of present and past - Extract on a painting and its representation of the past forms of transport 	<ul style="list-style-type: none"> - Pictures, photographs and paragraphs of information on how local history is constructed 	<ul style="list-style-type: none"> - Pictures, snippets of information on San lifestyle, social organisation, beliefs and religion; how local history is constructed from objects belonging to San 	<ul style="list-style-type: none"> - Text on Early settlements in the Limpopo Valley - Maps, pictures, drawings and information about early African societies and development of trade - Text which describes a historical event and chronology 	<ul style="list-style-type: none"> - Text about Location of indigenous inhabitants of the Cape in the 17th century - Text about Colonisation and dispossession - Text about Protracted struggle and clashes for land and cattle - Text which summarises chronological events 	<ul style="list-style-type: none"> - Maps, photographs, pictures, painting, diagrams, cartoons, timelines, and sources of interviews, posters, mind-maps - Text which provides an abridged version of the chronological events that led to the Mineral Revolution in South Africa 	<ul style="list-style-type: none"> - Text about events and how these unfold chronologically - Text about the background and events: Sharpeville massacre, Soweto Uprising, Langa, Evaton, Vanderbijlpark, Black Consciousness - Sources: books, autobiography, interviews, speeches, cartoons, posters, timelines on the events

Table 6.3 Writing expected in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> - Does not request for any written activity - No written activity request 	<ul style="list-style-type: none"> - Tabling/listing sources/objects that contribute to local history - Formulating questions for survey - Recording observations 	<ul style="list-style-type: none"> - Listing San objects that contribute to their history - Describing San lifestyle and practices from pictures and information 	<ul style="list-style-type: none"> - Written descriptions of early settlements and their lifestyle and livelihood - Explanations of how trade advanced and expanded 	<ul style="list-style-type: none"> - Descriptions of lifestyle and location of indigenous inhabitants - Explanations for colonisation and clashes 	<ul style="list-style-type: none"> - Writing definitions, explanations, providing reasons, describing background and changes to the economy - Planning/writing presentations - Creating timelines, posters, mind-maps 	<ul style="list-style-type: none"> - Explanations/reasons for events - Essay writing on background, causes, results and effects of events - Mind-mapping, preparing debates, presenting posters

Table 6.4 Substantive concepts specifically taught in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> - Use of a timeline to construct a story - Use of sources to record changes and make comparisons 	<ul style="list-style-type: none"> - Accessing sources (oral, visual and printed) as evidence to construct history 	<ul style="list-style-type: none"> - Indigenous inhabitants lifestyle, livelihood, location and subsistence - Archaeological findings and Conclusions 	<ul style="list-style-type: none"> - African societies (Mapungubwe and Great Zimbabwe), lifestyle and changes - Sacred leadership and practices - Archaeological findings and conclusions - Marco Polo, trade and globalisation 	<ul style="list-style-type: none"> - Indigenous inhabitants lifestyle, livelihood, location and subsistence - Settlement of Dutch, Free-burghers at the Cape - Slavery and labour - Colonisation: causes, consequences, dispossession 	<ul style="list-style-type: none"> - Maps depicting British controlled and independent areas - Growth of mines and economic impact - Migrant labour, hut taxes and reserves - Land dispossession –defeat of African kingdoms: Xhosa/ Pedi - Federation of SA states, political power 	<ul style="list-style-type: none"> - Apartheid, oppression, racism, minority rights - Causes, leaders, events, long and short-term consequences of apartheid and democratic movements: ANC, PAC - Reserves, Homelands, Resistance to apartheid, violence and events leading to democracy, role of Mandela

Table 6.5 Nominalisations in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<u>Nominalisations:</u> <u>(0)</u>	<u>Nominalisations:</u> <u>(0)</u>	<u>Nominalisations:</u> <u>(2)</u>	<u>Nominalisations:</u> <u>(11)</u>	<u>Nominalisations:</u> <u>(15)</u>	<u>Nominalisations:</u> <u>(22)</u>	<u>Nominalisations:</u> <u>(26)</u>
Nil	Nil	Interpret- interpretations Converse- conversation	Value-valuable Settle-settlements Leader-leadership Draw-drawing Locate-location Populate- population Explore- exploration Short-shortage Economy- economic Global- globalisation Grow-growing	Possess- dispossessed Break-outbreak Slave-enslave Settle-settlement Develop- development Colony- colonisation Accuse- accusations Respect- respectable Relation- relationship Rebel-rebellion Descend- descendants Immigrate- immigration Move-movement Populate- population	Discriminate- discrimination Labour control Expand- expansionism Labour-migrant labour Urbanise- urbanisation Possess- dispossession Accommodate- accommodation Defeat of African kingdoms Federate- federation Starve-starvation Weak-weakened Deputy- deputation Grow-growth Offend-offensive	Dominate- domination Form-formation Demonstrate- demonstration Resist-resistance Repress- repression Negotiate- negotiation Rise-uprising Solve-resolution Determine- determination Retaliate- retaliation Provoke- provocation Respond-response Liberate- liberation Ban-unbanning Democrat-

				Possess- dispossession	Product- production Recruit- recruitment Control of work Explain- explanation Erosion of families Treat-treatment Resist-resistance Power-powerful	democracy Situate-situation Define-definition Govern- ungovernable Move-movement Organise- organisation Employ- employment Federal-federated Emerge- emergency Press-pressure Constitute- constitution Dismiss-dismissal
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Table 6.6 Skills targeted in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> - Matching - Reading - Understanding a timeline - Labelling - Comparing - Identifying 	<ul style="list-style-type: none"> - Tabling - Recording - Analysing - Describing - Adding and totalling - Labelling - Interviewing - Explaining - Discussing 	<ul style="list-style-type: none"> - Comparing - Analysing - Describing - Tabling - Drawing map - Explaining - Discussing - Summarising - Identifying - Mind-mapping - Diarising 	<ul style="list-style-type: none"> - Comparing - Analysing - Describing - Labelling - Drawing - Explaining - Discussing - Summarising - Naming - Identifying - Listing and labelling - Utilising maps and scales - Timeline construction - Source-based comprehension 	<ul style="list-style-type: none"> - Comparing - Analysing - Describing - Tabling - Drawing maps - Source-based investigation - Explaining - Discussing - Summarising - Identifying - Mind-mapping - Diarising 	<ul style="list-style-type: none"> - Comparing - Analysing - Describing - Tabling - Drawing maps - Source-based investigation - Explaining - Discussing - Summarising - Identifying - Mind-mapping - Diarising - Creating timelines - Poster-planning and presenting - Listing - Sequencing gold mining activities - Interpreting evidence 	<ul style="list-style-type: none"> - Comparing and weighing evidence - Analysing - Describing - Tabling - Drawing maps - Source-based investigation - Explaining - Discussing - Summarising - Identifying - Mind-mapping - Diarising - Reading - Interviewing - Debating - Arguing - Formulating responses - Compiling essays - Designing and producing posters - Assessing source reliability - Detecting bias

Table 6.7 Genre in graded history textbooks

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> - Recording - Autobiographical - Personal recount - More everyday - Absence of chronological framework - Structure akin to English as opposed to history narrative 	<ul style="list-style-type: none"> - Recording - Absence of chronological framework - Remote generalised participants - Absence of narrative text structure (no beginning, middle or end) - Colourful and picturesque presentation - More immediate 	<ul style="list-style-type: none"> - Move from recording to explaining genre - Absence of chronological framework - Remote generalised participants: San - Absence of narrative text structure (no beginning, middle or end) - Absence of event description 	<ul style="list-style-type: none"> - Move from recording to explaining genre - Advent of purposive chronology - Specific participants: King, Chief, Marco Polo, Mandela, Thabo Mbeki - Appearance of narrative text structure: beginning, middle or end of traditional societies - Appearance of event description 	<ul style="list-style-type: none"> - Move from recording to explaining genre - Purposive chronology - Specific participants: Galant, Wilhelm Bleek - Generalise participants: Khoi-khoi, settlers - Clear narrative text structure beginning, middle or end) - Clear event description (abridged, summarised) 	<ul style="list-style-type: none"> - Move from explaining genre to interpretation - Purposive chronological discussion of gold mining - Specific participants: Mahadu Nkadameng - Generalise participants: miners, migrant workers - Clear narrative text structure: beginning (background), middle or end - Clear description of many events (abridged, summarised) 	<ul style="list-style-type: none"> - Move from explaining genre to interpretation and arguing - Purposive chronological/sequenced event description - Specific participants: Steve Biko, Nelson Mandela, Phillip Kgosana, Tsitsi Mashinini - Generalise participants: ANC, PAC, Cosatu, black people, white people, and freedom fighters - Clear narrative text structure: beginning (background), middle or end - Clear description of many events (abridged, summarised and bulleted for easy reference on turning points)

6.7 Discussion of findings

6.7.1 Reading expected in graded history textbooks (Refer to Table 6.2)

The reading aspect of this analysis leads the learner in the earlier grades to understand their immediate context in their present lives (Grade 3), then progresses to the local history of their environment. They interrogate colourful, everyday pictures of families and people and are introduced to black and white pictures to show them how ‘historical’ images first appeared. As reading advances to Grade 4, learners read about how stories can be constructed by gathering information from objects in the environment (evidence). They are shown how visual, written and oral elements obtained from magazines, newspapers and interviewing people can be used to glean information. In Grade 5, learners read about the San lifestyle by studying pictures of the San and drawings of archaeological findings that enable them to construct history knowledge on the San.

It is clear that chapters selected for the analysis advance in depth, especially as the context shifts from the early settlements of the Limpopo Valley, the early African societies to the development of trade and globalisation in Grade 6. The story is taken to the Cape where colonisation becomes the theme of change. There is a steady increase in length and complexity signalled by the number of pages and words incorporated in each chapter. The print becomes denser and smaller on the page making it more difficult to read. The words increase in complexity as they advance from very simple, everyday words like ‘transport’ and ‘harbour’ in Grade 3 to ‘European exploration’ in Grade 6, and then to ‘Black Consciousness’ in Grade 9. It is concepts like ‘repression’ and ‘negotiation’ in the higher grades which need explanation. This requires additional reading and understanding of the context, background, circumstances and events.

Reading about ‘colonisation’ and ‘dispossession’ in the Cape also requires a certain maturity and ability to understand. Its purposive placement in the Grade 7 year of study and in the textbook serves to build on what was placed before this. The maps, pictures and drawings that are presented in the Grade 7 text builds on earlier images found in lower grade textbooks. Maps included also have more complex information.

In the Grade 6 textbook, the maps used introduce learners to simple positions of countries and continents, exploration and routes followed by European explorers. The lens widens substantially to penetrate closer into South Africa, centralising the focus on the Cape. The areas under study become magnified and events such as frontier clashes and land ownership have to be viewed.

Reading becomes more intensive in Grade 8 with the introduction of diagrams and political cartoons which require more analysis, explanation and interpretation. Timelines advance to include more information across greater time periods about events out of the learners' context (decontextualisation). There are more photographs and posters for reading and analysing which require an informed critical reader. In Grade 9, there are extracts from autobiographies, interviews and speeches which require that a learner be proficient in reading in order to engage with high-level tasks. The tasks have to be read and require learners to be able to read at advanced levels so as to undertake a study of the background to events such as the Sharpeville massacre, Soweto Uprising and the circumstances at Langa, Evaton and Vanderbijlpark. The reading here takes the learner into an entirely new context. Temporal and spatial advancement presents an alternate decontextualisation. The language moves from very distinct informal day to day language (everyday) to advanced language competence which is more 'academic' in nature. This translates into the knowledge that advances from common sense knowledge (immediate) to uncommon sense knowledge (decontextualised) (Bernstein, 1975).

The National Curriculum Statement (DoE, Grades R–12, 2011) includes the Curriculum and Assessment Policy Statement for Social Sciences (Grades 4–6, 2011b, and Grades 7–9, 2011c). These two documents refer to the National Curriculum Statement (NCS) Home Language (DoE, 2011a) on writing length and complexity. According to the National Curriculum Statement for English Home Language (2011a, p. 10): “Well-developed Reading and Writing skills are central to successful learning across the curriculum. Learners develop proficiency in Reading and Viewing in a wide range of literary and non-literary texts, including visual texts. Learners recognise how genre and register reflect the purpose, audience and context of texts.” It further adds, “We know from research that children’s vocabulary

development is heavily dependent on the amount of reading they do”. The policy also stipulates that the Intermediate Phase builds on the foundation set in Grades R–3 where learners are involved in the reading process (pre-reading, reading and post-reading). Similarly, the writing and designing of texts is a process which consists of pre-writing/planning, drafting, revision, editing/proof reading, and publishing/presenting (p. 11). These developmental strategies for reading and writing are prescribed for learning across the curriculum.

6.7.2 Writing expected in graded history textbooks (Refer to Table 6.3)

This aspect of the analysis shows a clear path of development: learners in Grade 3 are not requested by the text to produce any written text, while Grade 9 learners are writing essays in various genres. The activities require more oral response and teacher-led engagement in the earlier grades. Grade 4 learners are required to table and list after recognising objects that contribute to local history construction. They are also involved in drawing up questions for interviews and in recording observations of their visits to local buildings and historical sites. These are very practical tasks which require simple sentence construction. Grade 5 learners would also be constructing very simple texts on describing and listing of archaeological findings that describe San lifestyle and practices.

Grade 6 writing production involves more details around map study and there is an increase in the length of writing about exploration and trade. This is gauged from the type/level of the questions asked, which require detailed explanation. Shifts in context and understanding require more description and reasoning. The Grade 7 textbook requires learners to write explanations and produce paragraphs on their understanding of ‘colonisation’ and the ‘warfare between indigenous populations and the immigrants’. The writing in Grade 7 is also the result of comparing different maps. These activities require understanding of different sub-components or elements such as rainfall patterns, climate, population distribution and temperature which influenced the lifestyle and location of the people in South Africa. These circumstances resulted in competition for land, resources and subsistence, as people of that time relied on growing their own food.. The advanced and complex thinking in this particular written activity requires an understanding of a combination of factors and that denotes a highly proficient learner whose ability must be aligned with the task expectation.

Complexity in the Grade 8 written tasks is even greater, as learners are requested to create timelines, posters and mind-maps which require understanding of the dimensions, content, style, criteria and structure of the text in order to produce it. Knowledge and understanding of the event must proceed before the learner tackles the task. Learners have to write definitions and explanations which involve comprehensive understanding of the background, changes to the economy, context and circumstances surrounding the Mineral Revolution. They have to provide reasons for and evaluate the circumstances of the event. Writing production required in Grade 9 in this sample of textbooks is the most complex, with learners required to write essays on the background, causes, results and effects of a particular event. They are also required to produce mind-maps, present debates and posters on the topic in a very structured manner. These tasks require time to plan, design and present. Increasing complexity is the overall trend of the advancing grades. The use of source analysis, bias detection and critical argument in the type of essays learners are required to write is in line with Greer's (1988, p. 21) contention that writing in history "needs to reflect the disciplinary thinking of constructing arguments and reaching conclusions through the use of evidence, critical thinking, and a detailed analysis of the context and origin of evidence". According to the CAPS Social Sciences Policy Statement (DoE, 2011c) for Grades 7–9, the learner has to demonstrate length and complexity through the grades stipulated by the language document. The CAPS Language Policy document (2011a, p. 32) details the length requirements by the number of words the essay must contain in text production, as reflected in the tables below:

Table 6.8 Length of text for home language (to be produced by learners)

Task	Grade 4	Grade 5	Grade 6
<ul style="list-style-type: none"> • Paragraph • Words • Sentences 	50 – 60 words	60 – 80 words	80 – 100 words
	5 – 6 sentences	6 – 8 sentences	8 – 10 sentences
	2 – 3 paragraphs	3 – 5 paragraphs	4 – 6 paragraphs
Oral creative texts, e.g. recounts, retelling or telling stories, short talks	2 min	2 min	2 – 3 min
Essay	100 – 120 words 2 – 3 paragraphs	120 – 140 words 3 – 5 paragraphs	140 – 150 words 4 – 6 paragraphs
Short story, including folktale	120 – 140 words 3 – 5 paragraphs	140 – 160 words 4 – 6 paragraphs	160 – 170 words 6 – 8 paragraphs
Summary	40 – 50 words	50 – 60 words	60 – 70 words
Longer transactional texts, e.g. letters	Body text 60 – 80 words	80 – 100 words	100 – 120 words
Shorter texts	30 – 40 words	40 – 60 words	60 – 80 words
Comprehension	150 – 160 words	160 – 180 words	180 – 200 words
Summary	40 – 50 words for 230 words text	50 – 60 words for 250 words text	60 – 70 words for 280 words text

Table 6.9 Length of texts for home language (for learners to engage with)

Task	Grade 4	Grade 5	Grade 6
Longer listening comprehension texts e.g. story, interviews, plays, news reports	150 – 200 / up to 5 mins	200 – 250 / up to 5 mins	250 – 300 / up to 5 mins
Shorter listening comprehension texts e.g. announcements, information texts, instructions, directions	60 – 70 words / 1 – 2 mins	70 – 80 words / 1 – 2 mins	80 – 100 words / 1 – 2 mins
Reading comprehension/intensive reading texts	150 – 200 words	200 – 250 words	250 – 300 words

Table 6.10 Vocabulary to be achieved by home language learner

	Term	1	2	3	4
Vocabulary Common spoken words	Grade 4	1700 – 2500	1850 – 3000	2000 – 3000	3500 – 4000
	Grade 5	2400 – 4000	2700 – 4250	3000 – 4500	4500 – 5000
	Grade 6	3500 – 5000	3700 – 5250	4000 – 5500	5500 – 6000
Reading vocabulary (new words)	Grade 4	800 – 1900 (75 – 250)	900 – 2200 (75 – 250)	1000 – 2500 (75 – 250)	2500 – 3000 (75 – 250)
	Grade 5	1500 – 3000	1750 – 3300	2000 – 3500	3500 – 4000
	Grade 6	2200 – 3800	2400 – 4200	2700 – 4600	3000 – 5000

Textbooks following the Department stipulations regarding length and complexity and evidence in the text is observed in the types of advancement in the number of written words, new and spoken. The length of text that learners must write has to conform to these stipulations. The textbooks selected for this analysis clearly demonstrate all of the above.

The ‘Concepts in history’ are clearly defined in the social sciences (DoE, Grades 4–6, 2011b and Grades 7–9, 2011c, p. 11 and 12 respectively) as follows:

Historical sources and evidence: History is not ‘the past itself. It is the interpretation and explanation from various sources. Evidence is created when sources are used to answer questions about the past.

Multi-perspective approach: There are many ways of looking at the same thing in the past. Looking into the past may involve:

- the different points of view of people in the past according to their position in society;
- the different ways in which historians have written about them; and
- the different ways in which people today see the actions and behaviour of people in the past.

Cause and effect: The reasons for events and the results of these events. The consequences of events drive future events and help explain human behaviour.

Change and continuity: Over a period of time it is possible to contrast what has changed and what has remained the same. Closely related contrasts that are used to teach History are similarity and difference and then and now, which help to make sense of the past and present.

Time and chronology: History is studied and written in sequence. It is important to be able to place events in the order in which they happened in time, and to consider their context. Timelines are often used to develop this concept.

Figure 6.10 Concepts specifically expected in graded history textbooks

The concepts specific to the discipline are the ‘meta-concepts’ of history that shape it. However, there are other ‘concepts’ or ‘terms’ such as ‘dispossession’, ‘colonisation’ and ‘resistance’ which fall into a general yet historical definition of concept. These concepts are related to the topics that are being covered in the curriculum and text. On closer examination they are shown to be to be linked as ‘specialised’ language to history. Words like ‘gravity’ and ‘potential energy’ are linked to natural science like ‘respiration and ‘reproduction’ are to biology. Similarly, concepts reflected in the table are linked to ‘history’ and while these may not seem different in complexity, each of the words or concepts are attached to levels of abstraction and understanding.

For instance, a ‘timeline’ is presented in Grade 3 which at an introductory level engages the learner to plan a story on the milestones of a life which amounts to 6–7 years. By comparison the ‘timeline’ used in the Grade 8 textbook is about a context far removed temporally and spatially from the learner’s immediate context and experience. The kinds of data that are plotted on the ‘timeline’ are more complex and abstract and require that a learner not only understand the content of the topic thoroughly, but that they have to also present the chronological order of the events. This explanation of the use of ‘timeline’ shows how a concept can be stretched or advanced through the grades.

The concept of ‘land dispossession’ in Grade 8 in South African history cannot be understood unless the earlier Grade 5 explanation of the lifestyle, livelihood, location and subsistence of the indigenous inhabitants of South Africa are properly understood. The African societies (Mapungubwe and Great Zimbabwe) in Grade 6 cannot be thoroughly understood unless learners understand how the archaeological findings assisted in the construction of the story of the San. The very same procedures or archaeological excavations lead to the discovery of Mapungubwe. Any conceptualisation of South African or African trade cannot be seen from a historical perspective without first understanding the earliest ivory trade along the East Coast of Africa emanating from the early African societies. With the advent of globalisation, Marco Polo’s travel is placed alongside the trade of African societies because both events transpired concurrently. So the placement of these topics in the same chapter of the Grade 6 text is understandable. The concepts, while advancing in complexity, do so in concurrence with the chronological sequencing of South African history.

The Federation of South African States was a consequence of ‘colonisation’ and ‘land dispossession’. Therefore, Grade 8 learners only learn about the ‘Federation’ after ‘colonisation’ in Grade 7. Maturity and development are also related to the kinds of concept taught at different grades. For instance, ‘political power’ is only considered in Grade 8 when the learner is mature enough to understand and assimilate this concept. It is only after this understanding of ‘political power’ that the idea of ‘resistance movements’, ‘racism’ and ‘democracy’ can be fully conceptualised. It seems that the order of concepts is dependent on chronological advancement of historical events. But

the events themselves are represented in increasingly complex ways and learners are required to engage with the complexity in equally advanced ways.

Engineering a way to ‘measure’ and ‘describe’ the differences in the ‘conceptual demand’ of the textbooks is a challenging task. The concepts that come out of the first level are rated on a scale from concrete to conceptually demanding. The progression of conceptual demand is not easy to track across grades, as each grade comprises some conceptually demanding topics and there are complex concepts which are also deemed conceptually ‘loaded’ or ‘semantically dense’. So while measuring one abstract concept against another is challenging and complex, there has to be an alternate way to describe the language with reference to ‘how’ dense it became. In this regard, Maton provides the concept of semantic gravity to describe the shift from contextualised to decontextualised knowledge, which he argues is essential to cumulative learning (Matruglio, Maton, & Martin, 2013). Bertram (2014, p. 7) argues that the concepts of contextualised and decontextualised knowledge are the most useful principles for working with progression in history. Bertram’s study showed that this principle is one of starting in the lower grades with narratives that are concrete and embedded rather than with concepts that are abstract and often ideological (*ibid*). It also entails commencing with history content that is close to the learners’ everyday world such as their family history or the history of the local community where they live. These progression principles reflect the learning theories that entail movement from concrete to abstract knowledge, from local to more universal knowledge. Progression, thus, is found in the move from common sense, contextualised, and individual narratives to uncommon sense, decontextualised and universal accounts. This level of analysis shows how these progression principles manifest across the sample of textbooks selected for the analysis.

6.7.3 Nominalisation in graded history textbooks (Refer to Table 6.5)

This analysis of the table can be represented on a graph as shown in Figure 6.11

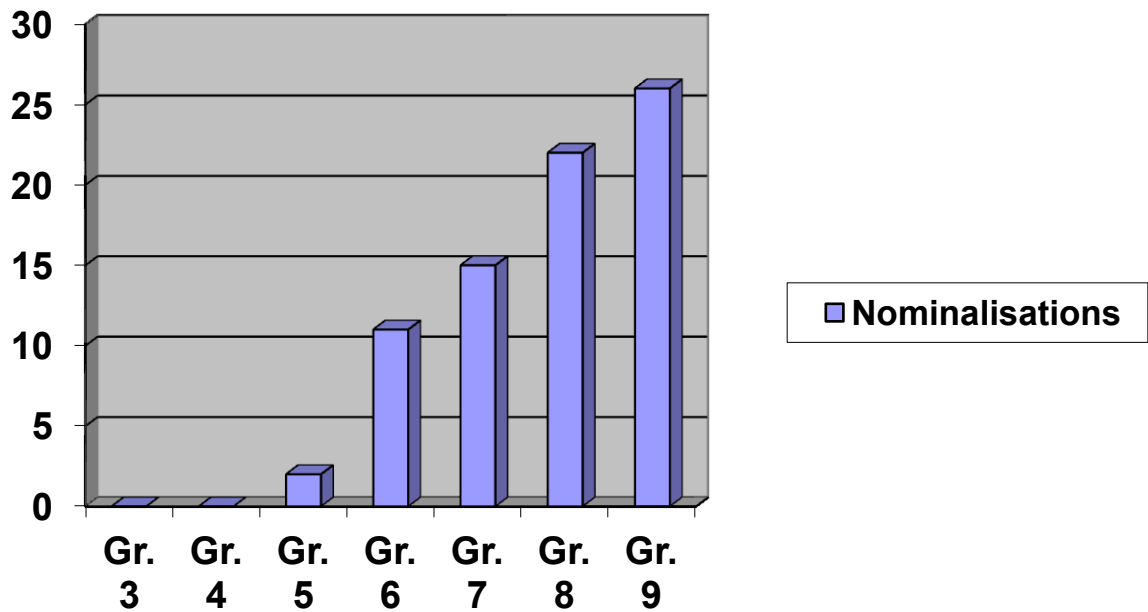


Figure 6.11 The number of nominalisations across texts

It is in this category of analysis that the most noticeable increase in complexity is shown. There is the advantage of being able to actually count the number of nominalisations and to record each one on a table to demonstrate increasing abstraction. The only challenge was identifying the nominalisations by close reading, engagement, recording and counting.

The graph shows no examples of nominalisation in Grade 3 and Grade 4 textbooks, but thereafter a steady increase is noted. The nominalisation table is explicit about the range of terms and concepts each grade introduces the learners to and effectively shows how the word is nominalised. For example, the word ‘unbanning’ cannot be explained to a learner at Grade 5 level within their historical context of study because it is better understood when it is studied with the liberation movements of South Africa in Grade 9. This does not imply that the word ‘unbanning’ cannot be taught in another subject like life orientation, as in the context of unbanning fireworks for specific festivals. It explains that the concept in history can best be understood if it is located within a particular context. Its abstraction can only be understood when the event and the context is unpacked. It seems that the unpacking of the events and contexts can make conceptualisation in history definitive. The ‘blurred’

decontextualised images that the learner ‘imagines’ become better defined and focused. A concept is only abstract when it is not in the learner’s immediate context or vocabulary. When it is enacted or ‘recreated’ within a context, both the context and the abstract concept become understood.

6.7.4 Skills targeted in graded history textbooks (Refer to Table 6.6)

In this part of the analysis, it is clear that the repertoire of skills learners are required to engage with in the text steadily increases. The kind of skill also increases in complexity as the texts advance through the grades. For example, mind-mapping is a skill that is targeted in activities in Grades 5, 6, 7, 8 and 9. The type of mind-map a Grade 9 learner would produce is not the same as the one a Grade 5 learner would produce. A source in a Grade 6 textbook is utilised in a very generic manner, but the source in a Grade 9 text is not only used, but is interrogated in specialised ways. Bias is detected and argumentative essays are compiled. The skills are themselves graded as they proceed from generic, simple extraction of detail from a given text in Grade 4 to advanced skills in higher grades requiring, not only reading and extracting of details, but also analysis and progression to high-level abstract construction of essays. The authenticity of sources is determined and complex arguments are generated. Reading, comprehension, interpretation and explanation are the primary skills each book encompasses, but advancement into creation and reasoning develops into what the policy document for CAPS social sciences (DoE, 2011b, p. 8) aspires to: “Learners should be asked to demonstrate their understanding to questions: Who? Where? What? Why? When? How? Should? Could? Is? Are? And by the time they reach Senior Phase: If?”

The NCS social sciences Grades 4–6 and 7–9 (DoE, 2011b and c, p. 10 and p. 11) policies stipulate a variety of specific aims and skills for the Intermediate and Senior Phases. However, it also states that in order for learners to achieve these aims and demonstrate these skills, they will need to have a full grasp and understanding of the content. The policy stipulates that memory skills remain important.

6.7.5 Genres in graded history textbooks (Refer to Table 6.7)

There seems to be a link between the text structure and arrangement in the textbook (genres) and the writing which the learner of history is supposed to produce. When

learners read texts with different structures (interpretive genres, classification, this description, explanation and discussion) they become acquainted with the style, presentation and organisation and if they are taught these structural organisations they can begin to use this structure in their own writing. This reinforces the understanding that history writing has specialised characteristics which learners can be taught to identify and employ. Learners can then be taught to learn to think and make meaning by writing in a specific way (Greer, 1988).

The NCS policy document (DoE, 2011a, p. 12) for the home language stipulates that a good knowledge of vocabulary and grammar provides the foundation for skills development (listening, speaking, reading and writing) in learners. The policy also advocates that a text-based approach that explores how texts work has the purpose of enabling learners to become competent, confident and critical, and developing their ability to evaluate texts. It is for this reason that texts purposively embody different text types. Learners are given exposure to variety of text structures, features and organisation so that their own writing tasks demonstrate these features, structures and organisation. Through interacting with a variety of texts, learners also extend their use of vocabulary.

Table 6.1 represents the effect of the **Genre Identification tool (B)**. It also summarises the genre type across the seven textbooks, showing clearly the move from a recording genre, to explaining, to interpretation and then argument (Bharath & Bertram, forthcoming). In terms of chronology, there is no mention of this in the Grade 3, 4 and 5 textbooks, and a chronological framework only becomes clear in the Grade 6 textbook. Similarly, narrative texts and detailed description of specific historical events only start appearing in the Grade 6 textbook. It seems that learners in Grades 3, 4 and 5 are in fact hardly being inducted into the key concepts of history such as narrative, chronology and specific historical events (Bertram & Bharath, 2015).

There are more generalised participant descriptions in lower grades which advance to more detailed biographies of specialised participants like Nelson Mandela (Grade 9) and Pius Langa (Grade 6). The Grades 6, 7, 8 and 9 take on a purposive chronological sequence in historical events. This is an abridged version of events merely

highlighting the beginning, middle and end of the event. Grade 9 takes it further to include effects of the event in greater detail. The number of events under study increase and they are studied from various perspectives. The number of people involved in the events also increase, therefore both general and specific participants in the events are scrutinised. The Grade 9 text has various sources ranging from extracts from books, autobiographies, speeches, interviews and spectators, to events to deliver this multi-perspective approach. The learners have to read and draw conclusions about the authenticity and bias of the sources and construct their own narratives. The key findings of the chapter are summarised and represented in Table 6.11 below.

Table 6.11 Summary of genre type across Grade 3–9 textbooks

	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
Genre	Recording Autobiographical Personal recount	Recording	Move from recording to explaining genre	Move from recording to explaining genre	Move from recording to explaining genre	Move from explaining genre to interpretation	Move from explaining genre to interpretation and argument
Chronology	Absence of chronological framework	Absence of chronological framework	Absence of chronological framework	Advent of purposive chronology	Purposive chronology	Purposive chronological discussion of gold mining	Purposive chronological/sequenced event description
Narrative	No narrative text	Absence of narrative text structure (no beginning, middle or end)	Absence of narrative text structure (no beginning, middle or end)	Appearance of narrative text structure (beginning, middle or end of traditional societies)	Clear narrative text structure (beginning, middle or end)	Clear narrative text structure (beginning (background), middle or end)	Clear narrative text structure (beginning (background), middle or end)
Nature of participants	Personal	Remote generalised participants	Remote generalised participants: San	Specific participants: King, Chief, Marco Polo, Mandela, Thabo Mbeki	Specific participants: Galant, Wilhelm Bleek Generalised participants: Khoi- khoi, settlers	Specific participants: Mahadu Nkadimeng Generalised participants: miners, migrant workers	Specific participants: Steve Biko, Nelson Mandela, Phillip Kgosa, Tsitsi Mashini Generalised participants: ANC, PAC, Cosatu, black people, white people, and freedom fighters
Event description	Absence of event description	Absence of event description	Absence of event description	Appearance of event description	Clear event description (abridged, summarised)	Clear description of many events (abridged, summarised)	Clear description of many events (abridged, summarised and bulleted for easy reference on turning points)

6.8 Conclusion

The objective of the chapter was to analyse the sampled textbooks using a ‘birds-eye’ view of concept-mapping and compartmentalising information extracted into different text boxes. These compartments or categories were specifically named so as to deal with each individually. The independent analysis of each text box was then amplified with a tabulation of comparisons and differences. These categories range from the types of reading and writing learners would be expected to engage with to the types of skill learners would be expected to display. The number of nominalisations was also noted.

All of the categories show proportional differences and the section on the findings and discussion elaborate extensively on the patterns observed. These patterns all show steady overall advancement and can be used to explain grade progression. There is clear movement of knowledge from the concrete to abstract, from contextualised everyday knowledge to more universal, decontextualised knowledge. This chapter also concluded that learners in Grades 3, 4 and 5 are hardly being inducted into the key concepts of history such as narrative, chronology and specific historical events. These key constructs can be incorporated in earlier grades, where learners can encounter second-order concepts. For instance, a chronological approach to learning can result in the promotion of second-order concepts such as cause and effect (Tew, 2014, p. 22). Cause and effect relationships are embedded in a chronologically based class (*ibid*). Key historical events, other than personal history, could perhaps take on simpler forms in earlier grades. The CAPS social sciences (DoEc, 2011, p. 11-12) emphasizes time and chronology by stating that history is studied in sequence and so the order in which events happened in time and their context is important.

CHAPTER 7
LEVEL 3 – MIXED METHODS:
INSTITUTIONALISATION, HISTORICAL SOURCE INQUIRY
AND COGNITIVE DEMAND

7.1 Introduction

This chapter is divided into three very distinct steps, each contributing to the final and most intensive level of the analysis. The objective of the three steps in Level Three is to reflect how textbooks advance in historical thinking, using a mixed-method analysis to target categories of institutionalisation, cognitive demand and historical source inquiry, which together signal progression. Figure 7.1 below shows each of the steps:

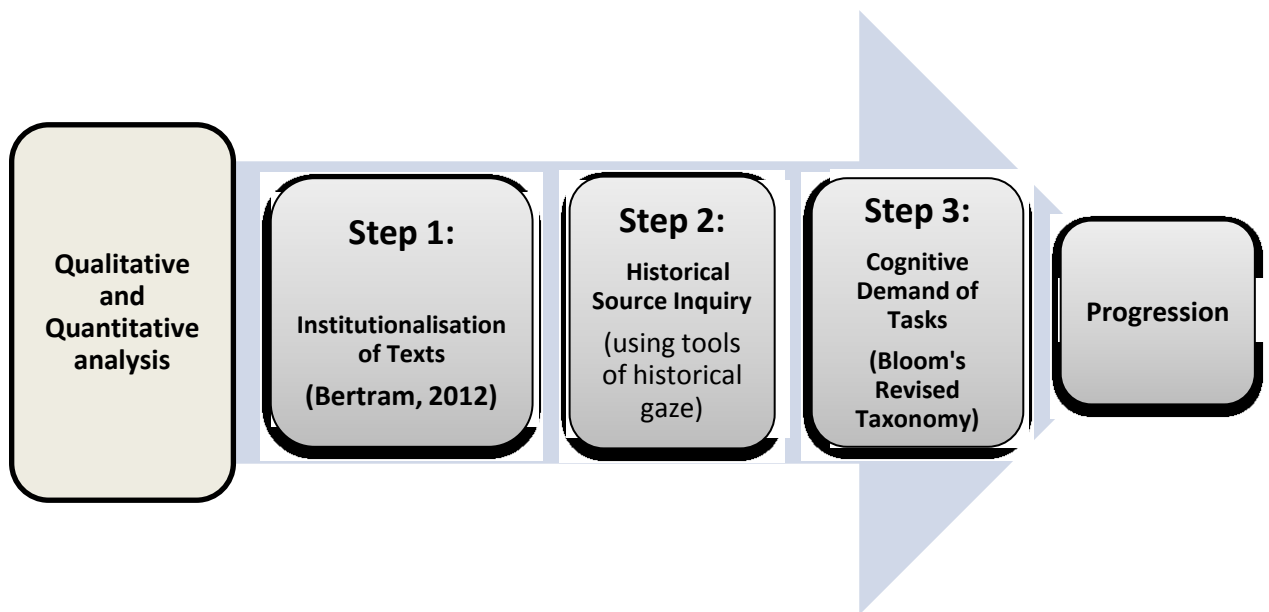


Figure 7.1 Level Three in three steps

I have undertaken two levels of analysis in the previous chapters. Chapter Five deals with a qualitative analysis of the selected textbooks to provide an initial overview of the presentation of textbook information. It attempted to understand how concepts in the substantive and procedural dimension shift. Chapter Six, concerned genre analysis, deals with the types of reading and writing learners are required to engage with as well as the necessary skills they are expected to encounter. The degree of

nominalisation in the text was also investigated. Chapter Seven presents the final collaboration of the parts constructing the puzzle of *historical thinking*. The very specific and in-depth steps generate qualitative and quantitative data, each building on the previous to inform the phenomenon under investigation. I include theoretical references and discussions for each step which explains my choice of methodology in the attempt to let the data speak back to its theory, while answering the critical question of the study. The idea of creating a language of description for the analysis is to facilitate research. The steps explain what the language is about and how it is being used in the analysis, and finally, it creates structure and order in the discussion about data (statistics, in the form of tables).

7.2 Step One: Institutionalisation

Step One is diagrammatically represented in Figure 7.2 below. This step involved extracting all the information on a page from the sampled texts that denotes knowledge, and coding it into categories. The units of analysis are each heading, sentence, introductory explanation, paragraph, word bank, picture, cartoon, drawing, photograph, map, source and case study. These segments/statements of information are colour-coded and numbered as types and then analysed to determine the degree of ‘institutionalisation’ in the texts. The tasks are not included in this step. The cognitive demand of activities is analysed in Step Three. Statements or segments labelled as a ‘source’ are analysed in Step Two, which deals with historical source inquiry.

The ‘institutionalisation’ process consists of coding the knowledge segments into the quadrants of the Esoteric, Descriptive, Expressive and Public Domains, based on Bertram’s (2012, p. 8) ‘Domains of practice for School History’. The coding is guided by Tool 1 (Appendix A) where the coding of the knowledge segments indicate how textbooks present their knowledge in terms of the categories identified, using the language of description by Bertram (2012). There is possibility here for a quantitative analysis reflecting percentages of ‘institutionalisation’ of practices, by counts of knowledge statements and the number of strong or weak instances of ‘institutionalised’ statements there are compared to the total number coded, across all textbooks. This provides rich data for the qualitative and quantitative discussion. Strong ‘institutionalisation’ refers to both the substantive and procedural knowledge

being specialised (content clearly historical, language specialised and procedures specialised), which should be the objective of progression in history education. Weak ‘institutionalisation’ would then refer to the converse.

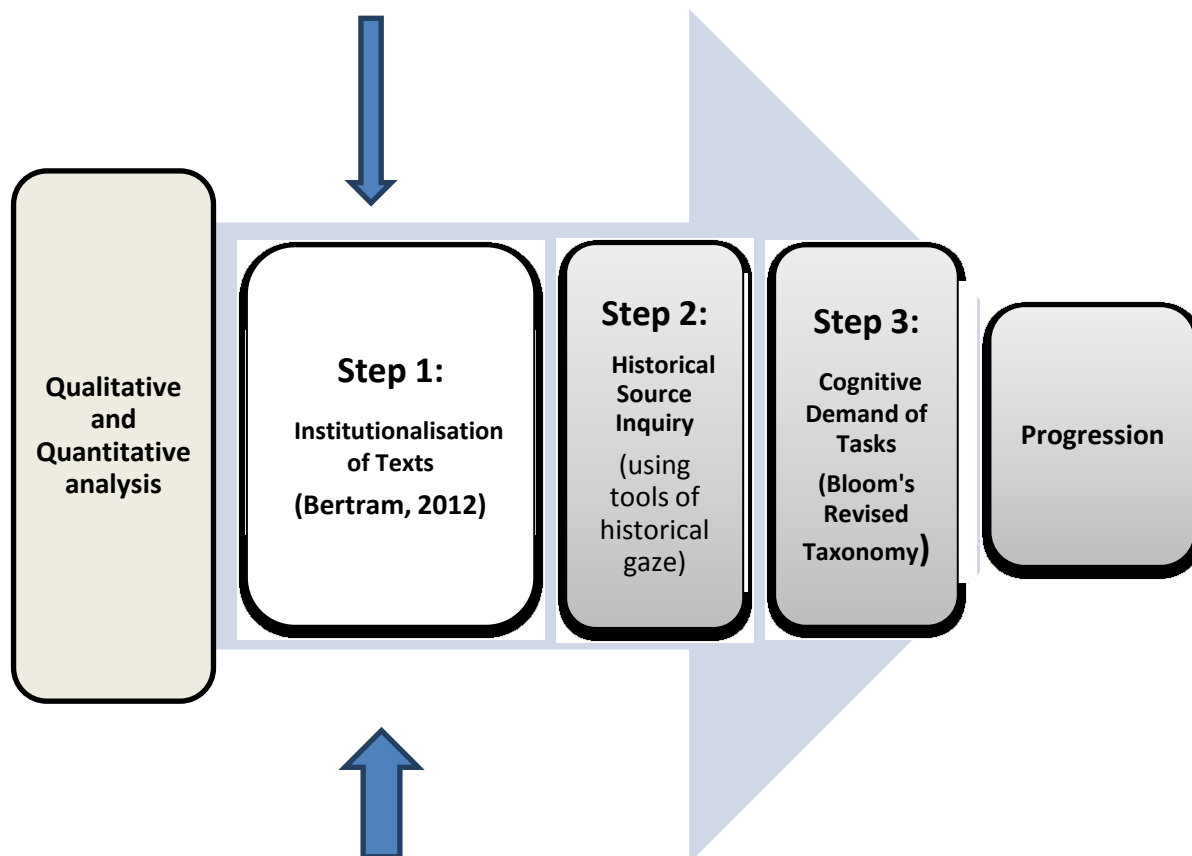


Figure 7.2 Step One in Level Three

7.2.1 Links with theory

Since the domains of practice for school history, as described by Bertram (2014, p. 4), set out to distinguish between substantive and procedural knowledge within the textbooks, it is useful to define each clearly. Substantive history knowledge, or first-order concepts, include an understanding of space, place and time. These involve knowing what happened, why and when, and knowing the propositions of history which are constructed by historians, using their procedural investigations. It includes knowledge of the key concepts and periods which make up the content of history. Procedural knowledge, or second-order concepts (Lee & Ashby, 2000), are the organising ideas which give meaning and structure to events in history. These are the concepts that give shape to historical practice and thinking about the past. They are

the ideas about the nature and status of historical accounts, about how historians read evidence and construct explanations and arguments using that evidence (Bertram, 2014).

Bertram (2014, p. 6) further argues that in history, it is the second-order concepts, or the procedural knowledge that underpins the discipline (citing Lee & Ashby, 2000; Lévesque, 2008), such as the ability to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take historical perspectives and understand the moral dimension of historical interpretations (Seixas, 2006).

For the coding of 'knowledge signals' into the quadrants, a further deeper level of guided criteria needed to be established in order to indicate how the language of the textbook is specialised or not. There had to be this 'external language of description' which would harness the placement of statements into their respective categories of specialisation or domains. The clarity of these indicators in the language of the textbook would enable coding in specific domains. I thus set up the following categorisation of data. The rubric is pertinent to the range of textbooks included in this study, but could be followed in other similar studies.

7.2.2 The method

All information presented on the page of the chapter was analysed by types. These chunks of information are the segments that occupy the format of headings and sub-headings, paragraphs, activities or tasks (which are also analysed again with regard to their cognitive demand in Step Two), word banks, photographs, cartoons, sources (analysed in Step Three), pictures, case studies and maps. The pictures or photographs that are labelled as sources fall under the category of 'source' and are analysed as such in the section on Historical Source Inquiry. The details and provenance of the pictures/photographs are considered when analysing the source. Using the language of description by Bertram (2012, p. 8), these chunks of information are coded using the quadrants of the Esoteric, Descriptive, Expressive and Public Domains. The types of information the chapter depicts are given symbols to make the analysis simpler. Each of the information signifiers are coded as shown in Table 7.1:

Table 7.1 Analytical Tool 1

Unit of Analysis	Analysis Method	Analysis Category
Introductory questions, chapter descriptions, topic summaries, assessment rubrics.	Not coded	Coded as: Institutionalisation of Practices: Esoteric I+ I+
1. Headings and sub-headings	H1, H2 etc.	Descriptive I+ I-
2. Paragraphs/chunks of subject content	KS 1, KS 2 etc.	Expressive I- I+
3. Pictures and photographs	P1, P2 etc.	Public I- I-
4. Cartoons	C1, C2 etc.	
5. Sources	S1, S2, etc.	
6. Activities	Task 1 (T1), T2, etc.	
7. Maps	M1, M2 etc.	
8. Case studies	CS 1, CS 2 etc.	
9. Word banks	WB 1, WB 2 etc.	
Topic summaries and formal assessment tasks at the end of the text will be excluded.		

Table 7.1 above shows the initial tool for the data coding. It represents a reduced form of the steps used to code the headings, sub-headings, pictures, photographs, cartoons, sources, activities, maps, case studies and word banks. The coding generates different quantities that can offer nuanced discussion. The quantitative analysis reflects percentages of the ‘institutionalisation’ of practices with counts of each category and shows the number of strong and weak instances of ‘institutionalised’ statements that can be compared to the total number coded across all textbooks. The statistics on strong ‘institutionalisation’ refer to both the substantive and procedural knowledge being specialised (content clearly historical, language specialised and procedures

specialised). Figure 7.3 shows the labelling of units for analysis using the coding key or Analytic Tool in Table 7.1.

An example of how a page is coded:

Retrieved from *Social Sciences. Solutions for all*, Grade 6, Learner's Book, p. 24.

Unit 1: Changes in societies in the Limpopo Valley

H2

Word bank

A B C

AD	<i>anno domini</i> (Latin); 'in the year of our Lord'
complex	having many rules
societies	people living together in organised groups
source	something that gives us information about something such as an event
state	an area controlled by a leader or government
trade	buying and selling to get things

WB1

Changing societies in the Limpopo Valley

H3

About 900 AD African farmers moved south from southern Zimbabwe and east from Botswana. They settled in the Limpopo Valley about 1 100 years ago.

S1

K1

The Limpopo Valley was much wetter than it is today. There were many more trees and bushes. It was a good area for farming and raising cattle. But people did not live in this area only because of farming. Many herds of elephants grazed in the bush of the Limpopo Valley. Elephants were valuable because of their tusks. Elephants' tusks are made of ivory. Ivory was very important for trade between this part of South Africa and the east African coast and beyond.

Source

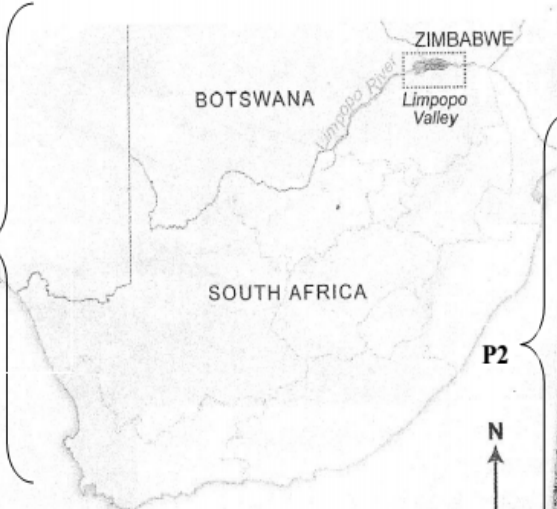
Between 900 AD and 1300 AD, African people in the Limpopo Valley developed the first complex society in southern Africa. This society also created the first town, the first king, the first palace with a stone wall, the first capital city, and the first state.

Adapted from: *Mapungubwe – ancient African civilisation on the Limpopo* by T N Huffman, Wits University Press, 2001

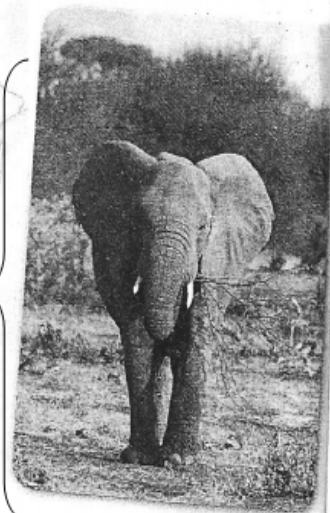
K2

The first societies in the Limpopo Valley were farmers and cattle owners. Later people moved into the Limpopo Valley to hunt elephants. They used elephants' tusks for trade.

M1



P2



24

• Mapungubwe

Figure 7.3 Labelling of units for analysis

The categorisation of these units of analysis into the different domains is guided by the language of description provided by Bertram, and each unit is categorised using

the criteria of the domains. The results for each unit is coded on the recording sheet in Appendix A for ‘Institutionalisation’. The following table shows the domains of practice for school history, introduced as Figure 2 (Bertram, 2012). Here it is used as a tool for coding statements of information.

Table 7.2 Tool for the institutionalisation of categories

Substantive knowledge	Procedural knowledge	
	<i>Specialised (I+)</i>	<i>Generic (I-)</i>
<i>Specialised (I+)</i>	Esoteric (content clearly historical; language specialised, and specialised procedural knowledge that fosters historical thinking)	Expressive (content clearly historical; language specialised but generic procedural knowledge)
<i>Generic (I-)</i>	Descriptive (content knowledge not specialised to history, perhaps located in the everyday; language unspecialised; specialised procedural knowledge that fosters historical thinking)	Public (content knowledge not specialised to history, perhaps located in the everyday; language unspecialised; generic procedural knowledge)

Bertram (2012, p. 10) suggests that these domains “provide us with an analytic tool and a language of description”. This tool is useful to interrogate knowledge in textbooks to identify whether content can be clearly historical, whether the language can be classified as specialised or generic and whether procedural knowledge can be generic or specialised. Bertram further argues that while both specialised substantive and procedural knowledge are integral to the development of historical thinking, the two strands can come apart when the practice is recontextualised to the school classroom. She does not suggest that all school history tasks must exclusively be located in the ‘esoteric domain’, since it is important to make links with learners’ everyday knowledge and knowledge of other subjects, particularly in the primary school. This applies to textbook presentations of content as well. Thus, pedagogically, the history educator can make conscious decisions about how to move learners from

the public domain (where procedural knowledge is generic and substantive knowledge is everyday) to the esoteric domain where both kinds of knowledge are specialised to history.

Bertram (2012, p. 11) adds that history teachers can move through the expressive domain where the main focus is on specialised procedures and thinking, or through the descriptive domain where the main focus is the substantive knowledge. The teacher can decide if it is more appropriate to focus on substantive knowledge than procedural knowledge. However, as learners progress from primary school to high school, they need to be more specifically inducted into the esoteric domain of thinking historically that embraces both the substantive content knowledge of history and the procedural knowledge.

Bertram (2012, p. 11) purports that while the purpose of school history in South Africa and elsewhere is not only to induct learners into the discipline, but also to support the principles of transformation, democracy, human rights and social justice (Department of Education, 2003), the question looming is how does history do this. Bertram concludes that the broader aims of transformation are in fact to induct learners into the specialised ways of thinking historically. When learners gain mastery over both history content and specialised procedures, they take a small step into the specialised practice of the discipline, and this develops ways of thinking historically that are needed for citizenship. As learners gain mastery over the esoteric domain, they will develop a historical gaze.

7.2.3 Findings

Using the domains of practice as an analytic tool, the following results were obtained:

Institutionalisation of practices

1. Headings and sub-headings

Table 7.3 shows the number of headings and sub-headings in each textbook and the percentages of institutionalisation in each:

Table 7.3 Number of headings and sub-headings institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	0 (0%)	3 (14%)	0 (0%)	2 (8%)	0 (0%)	0 (0%)
Expressive Domain	5 (83%)	5 (45%)	12 (54%)	9 (43%)	21 (88%)	24 (75%)	18 (82%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	1 (17%)	6 (55%)	7 (32%)	12 (57%)	1 (4%)	8 (25%)	4 (18%)
Total Headings/ Sub-heading	6 (100%)	11 (100%)	22 (100%)	21 (100%)	24 (100%)	32 (100%)	22 (100%)

The inclusion of headings and sub-headings in this level of analysis was necessitated because they are part of the knowledge content or data on a page in the textbook. They can often stand on their own and give the learner significant cues on what is going to be learned and, sometimes on how it is going to be learned. Some headings explicitly state the cause and effects of a particular event. Some headings are also semantically dense and would require the teacher to unpack the meaning.

The results reflected on Table 7.3 are not surprising, considering that it is difficult to ascertain from headings and sub-headings what procedures they convey. This accounts for the weak coding in the Esoteric and Descriptive Domains, as these are the quadrants which involve specialised procedural knowledge. However, there are small numbers of headings which actually convey the processes that learners should follow in the chapter to work as a historian would, where the content of the heading is clearly historical, the language specialised and the knowledge is also procedural knowledge that fosters historical thinking.

The findings suggest that there are dense, more substantial headings and sub-headings which fall into the Expressive Domain, where there is greater historical content and where language is specialised with generic procedural knowledge. Learners would be required to read the headings and extract information. It was difficult to make a

judgement about the procedural knowledge even though some of the headings did provide inference of some second-order concepts (see examples below). The larger percentage of headings and sub-headings in the senior grades constitutes a growth in the substantive knowledge within the textbooks. The Grade 3 text is the exception amongst lower grade textbooks, as its headings and sub-headings do not follow the overall trend. The few sub-headings it possesses provide learners with historical content and its language is specialised to history. However, Grade 3 learners of this textbook would be required to read and extract, rather than to engage with any specialised historical procedures.

Figure 7.4 shows a heading (H 12) coded within the Esoteric Domain.



Figure 7.4 Example of a heading coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all. Grade 7. Learner's Book*, p.129

Heading (H12) was coded within the Esoteric Domain because the content of the heading is clearly historical, the language is specialised to history with reference to slavery in a particular space and the procedural knowledge is specialised, as the heading creates for the learner a contextualisation of the time and the emotions that went with it. The heading is couched in a question which requires an answer. By

answering it, a space is created for the learner to ‘feel’ some kind of association or emotion that lends itself to the development of historical thinking. This inculcates the development of empathy structured within historical thinking as one of six structural and procedural benchmarks (Seixas, 2006).

Figure 7.5 shows a heading (H7) coded within the Expressive Domain.

Unit 2 1976: Soweto uprising } H7

1. Causes, leaders and events of 16 June, spiralling events that followed throughout the country, longer-term consequences for resistance and repression } H8

In 1963, many of the leaders of the ANC (which was banned) were arrested while they were at the MK headquarters in Rivonia, Johannesburg. They were put on trial for treason, found guilty and sentenced to life imprisonment. These leaders included Nelson Mandela, Walter Sisulu and Govan Mbeki. This affected the ANC very badly, as its main leaders were now in prison. It made the ANC weaker in the 1960s and 1970s.

Figure 7.5 Example of a heading (H7) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 9. Learner’s Book, p.212

The heading (H7) is coded within the Expressive domain because the content is clearly historical and the language is specialised to history. However, there are no historical procedures for the learner to engage with other than generic extraction of information by reading. A clear comparison can be made within the same scan which shows heading (H8) coded within the Esoteric Domain, which clearly has historical content (Substantive concepts) and the procedural dimension is configured in the benchmark of ‘cause and consequence’.

Figure 7.6 shows a heading (H18) coded within the Public Domain.

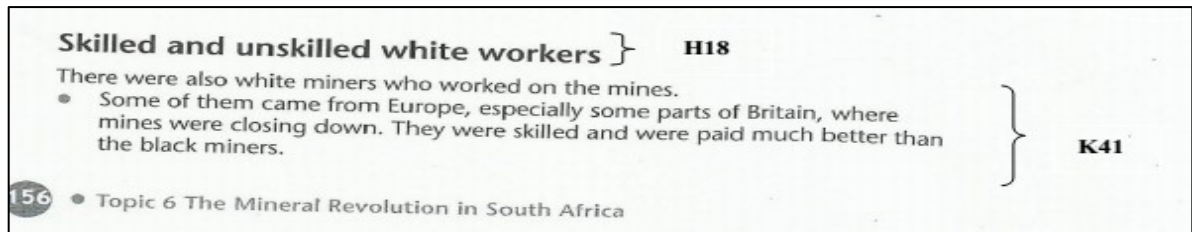


Figure 7.6 A heading (H18) coded within the Public Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 8. Learner's Book, p.156

Heading (H18) has been coded within the Public Domain because 'Skilled and unskilled workers' could refer to subjects other than history. Therefore, the content of the heading is clearly generic, is located in everyday language and there is generic extraction of information by reading. Learners are not engaged in any specialist procedural knowledge.

There are no other clear examples showing headings which fall into the Public Domain. While there are examples that contain content knowledge not specialised to history, and which could perhaps be located in the everyday with its unspecialised language, there is no development of procedural knowledge and so no fostering of historical thinking.

2. Paragraphs/chunks of subject content

Table 7.4 shows the number of paragraphs/chunks of information per textbook and the percentages of institutionalisation in each:

Table 7.4 Number of paragraphs institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	1 (20%)	1 (7%)	6 (22%)	6 (19%)	1 (2, 5%)	0 (0%)	0 (0%)
Expressive Domain	2 (40%)	3 (20%)	21 (78%)	26 (81%)	39 (97, 5%)	64 (96%)	51 (100%)
Descriptive Domain	1 (20%)	8 (53%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	1 (20%)	3 (20% ⁰)	0 (0%)	0 (0%)	0 (0%)	3 (4%)	0 (0%)
Total Number of Paragraphs	5 (100%)	15 (100%)	27 (100%)	32 (100%)	40 (100%)	67 (100%)	51 (100%)

The results reflected on Table 7.4 show a stronger placement of paragraphs in textbooks within the Expressive Domain. This signals an overwhelming amount of knowledge content in the textbooks, especially in the higher grades which focus on greater historical content. There is clear advancement in the substantive dimension. However, there is also less engagement with specialised historical procedures. Much of the information in the text paragraph is presented as an account of past events which are historical events. Learners would have to read and extract information without using the knowledge in any specific way. The tasks which come after the paragraphs perhaps shed better light on the kinds of procedures that learners would put into effect once they have assimilated the substantive knowledge. Therefore, it is clear that textbooks gradually present 100% in the Expressive Domain, where the content of the paragraph or chunk of information is clearly historical, with language which is specialised to history and procedural knowledge which is generic. In earlier years there can have been higher instances of the Public Domain, where learners engage in content knowledge not specialised to history, or even located in the everyday in order to make learning easier. There is also the very distinct move away from the Public Domain as content knowledge in the higher grades takes on greater concentrations of specialised knowledge formats.

Figure 7.7 shows a chunk of information/paragraph (K2) presented as a timeline coded within the Descriptive Domain.


Unit 1 About Me WEEK 1
Activity 3


What is a timeline? } H1


Rishon's history } H2


A timeline enables you to see important information about your past life, to recognise achievements you have made and helps you plan what you would like to do in the future. } K1


Read the story of Rishon's history.


2011 baby sister was born  P1

2010 family moved to a new home  P2

2009 started going to crèche  P3

2008 fell and broke his arm  P4

2006 celebrated first birthday  P5

2005 born in Umhlali  P6

Read the events of Rishon's history. } T1

Do you see how the timeline tells a story? } T2

Unit 1: About me 1

Figure 7.7 A chunk of information/paragraph (K2) presented as a timeline coded within the Descriptive Domain

Retrieved from *Shuter & Shooter, Top Class Life Skills*. Grade 3. Learner's Book, p. 1

The piece of text is coded within the Descriptive Domain. Whilst the information to the Grade 3 learner is 'Rishon's history', its content is not specialised to the subject of school history but is located in everyday language which is unspecialised. It deals with a birth of a sister, moving to a new home and other general information. While it is a 'personal history', it is not the 'disciplinary' history one would expect in other history classrooms. However, the act of following a timeline is a procedure for

sequencing events in history, therefore the specialised procedural knowledge fosters the skills associated with constructing historical knowledge, in spite of the lack of specialisation in the substantive knowledge.

Figure 7.8 shows a chunk of information presented as a timeline coded within the Esoteric Domain.

★ Unit 12 How people lived long ago

WEEK 3
Activity 3

Records of the past } H6

The first public railway in South Africa was The Point to Durban railway of 1860. This 1889 painting by A.H. Barrett shows the Point Station on the official opening of the first railway in South Africa from the Point to Durban.

It was linked to harbour development. One historian named Russell recalls the comments made by some Zulu speaking spectators on seeing the first steam train:

"It is a strange beast. Its belly is full of fire and vapour; they feed it with water and wood logs. It is like a rhinoceros, but it blows smoke and sparks through its horn. Truly it is stronger than the elephant, for it pulls many wagon loads."



Source: Railway Society of Southern Africa.

K5 P29 T1

Figure 7.8 A chunk of information presented as a time-line coded within the Esoteric Domain

Retrieved from *Shuter & Shooter, Top Class Life Skills*. Grade 3. Learner's Book, p.

This piece of information was coded within the Esoteric Domain, as the content is clearly historical and the language specialised to the subject of history. The number of substantive concepts that are both unique and universal are compared with the everyday content which is merely a vehicle for the transmission of substantive content. There are details of an 1889 painting directing the learner’s attention to the source information in history. There is a reference to a historian named Russel who overheard an oral account of Zulu onlookers observing a steam train for the first time. There is undoubtedly specialised procedural knowledge that fosters historical thinking in the text. The ‘use of sources’ procedural benchmark in Seixas (2006) is configured in the content. Even the heading ‘Records of the past’ points to the content of the section as both historical and as well as procedural in content.

Figure 7.9 shows a chunk of information coded within the Public Domain.

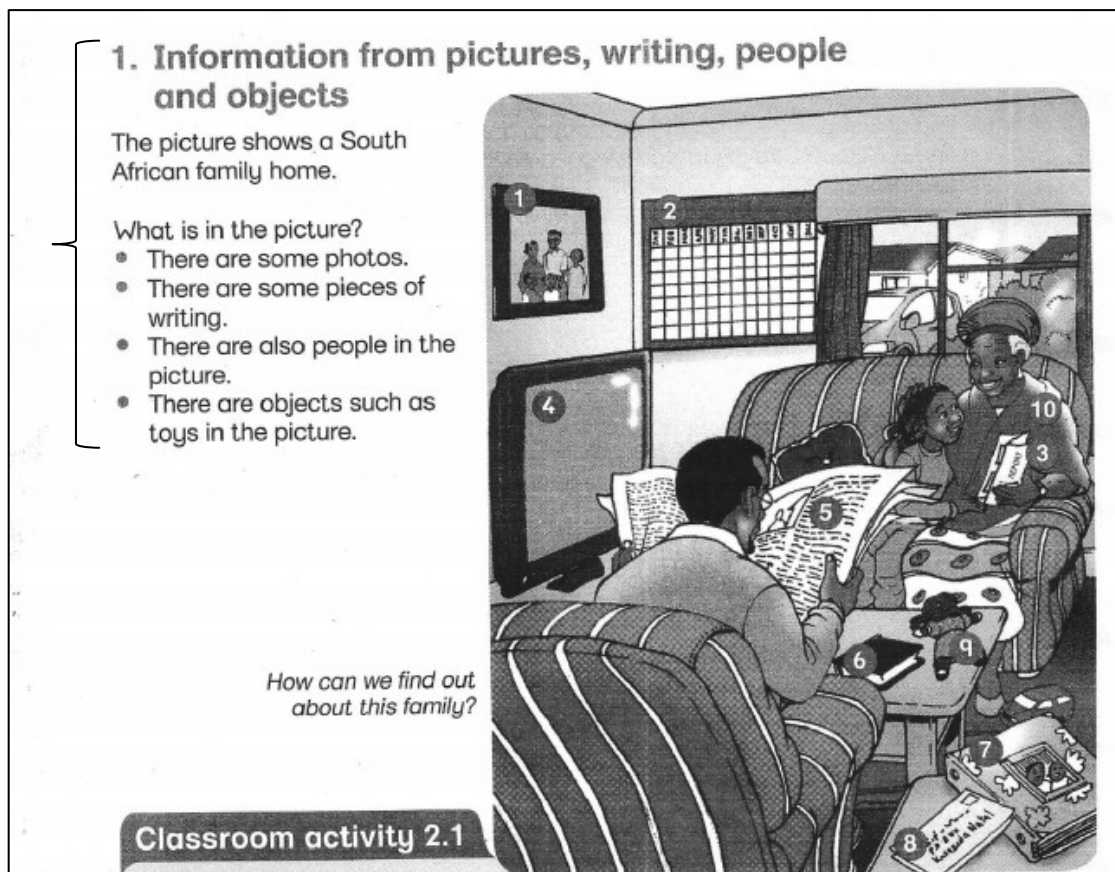


Figure 7.9 A chunk of information coded within the Public Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner’s Book, p. 24

This text is coded in the Public Domain quadrant because the content knowledge is not specialised to history but located in the everyday. The language is unspecialised and the procedural knowledge is generic, as learners are merely extracting information from the picture. They are asked to identify the photos, pieces of writing and objects in the image. They are asked to 'find out about this family'. Clearly, the intention is to draw the learners to specific details in the picture that conjure up what the family does every day and how its moments are recorded in family albums. The objective is to lead to the learner to how history can be made. They are, however, not engaging with any particular historical events. There is an absence of a clear narrative.

Any further analysis has to be directed by the teacher who can lead the learner by directing probing questions designed to get them to understand what the presence of a particular object in the picture means to the family. The teacher has to trigger a response in the learners to draw out the connection between an object and how it can create a story about people. Learners can then piece together information about each object, photo, writing and person to construct a story about the family, how they live, what they do in their family time, what their interests are and how they document their own history (family holidays, birthdays etc.). While the content is not specialised to history, perhaps it is even located in the everyday, and the language is unspecialised, the idea of extracting information from visible objects and people fosters historical thinking because the procedures are increasingly specialised. This points to the 'use of primary source evidence' procedural benchmark in Seixas' (2006) framework.

Figure 7.10 shows a chunk of information (K4) coded within the Expressive Domain.

Word bank **A B C**

history the time before the present } **WB3**

1. How we find out about the past } **H5**

K4 { In the last unit, we saw how we can find out about people from writing, pictures, talking to people, and from objects. We can use the same ways to find out about the past.

The past is the time before the present. Some things happened a long time ago in the past, such as 100 years ago. In history we study things that happened in the past.

The past is the time before the present

Figure 7.10 A chunk of information (K4) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner's Book, p. 26

This chunk of knowledge (K4) is coded within the Expressive Domain, as the content is clearly historical and the language specialised, but the procedural knowledge is generic in nature. Closer analysis of the text shows it to be a very limited conception of what the past is. Many, if not all, social sciences textbooks have not presented a timeline showing the numbering of the centuries and how times in the BCE (Before Common Era) and CE (Common Era) operate. This particular text's narrow definition of the past 'being the time before the present' can be misunderstood by learners who may not have acquired the understanding of what a 'present tense' might be. A second-language learner perhaps does not have the vocabulary or grammar skills associated with tenses and this would impact on the overall understanding.

3. Pictures/Photographs

Table 7.5 shows the number of pictures or photographs in each textbook and the percentages of institutionalisation in each:

Table 7.5 Number of Pictures/Photographs institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	18 (60%)	5 (20%)	19 (73%)	8 (38%)	1 (5%)	0 (0%)	1 (5%)
Expressive Domain	3 (10%)	2 (8%)	3 (11,5%)	7 (33%)	17 (80%)	15 (80%)	12 (60%)
Descriptive Domain	0 (0%)	5 (20%)	1 (4%)	1 (5%)	1 (5%)	0 (0%)	0 (0%)
Public Domain	9 (30%)	13 (52%)	3 (11,5%)	5 (24%)	2 (10%)	3 (17%)	6 (30%)
Total Number of Pictures/ Photographs	30 (100%)	25 (100%)	26 (100%)	21 (100%)	21 (100%)	18 (100%)	19 (100%)

Pictures and photographs are a valuable medium through which meaning is translated for the learner. By seeing an image of the event by reconstruction, the learner can make sense of it and contextualise the time period at particular intervals. Images also help the development of historical thinking and the ability to convert the change in time and to understand how things were and how they have changed. In essence, the procedural concept of change and continuity is indirectly scaffolded through the use of images.

These results of the analysis of images are significant because the kind of pictures and photographs in a history textbook brings to the learner the visual element of learning history. The number of these images increases substantially, showing more learner engagement with visual imagery and indicating an increase in substantive knowledge.

There also appears to be a greater concentration of photographs and pictures that are located in the Expressive Domain, indicating an emphasis on the historical content of a picture and on generic procedures. This is particularly conspicuous in the higher grades. The placement in this domain would suggest that learners engage with the pictures and photographs in more generic ways rather than utilising specialised historical procedures. One of the reasons can be attributed to the general lack of appropriate provenance that drowns thorough engagement with the authenticity of the

sources. The pictures and photographs featured in the textbooks and which are analysed here are not labelled as sources.

Some of these images appear as black and white drawings or representations to create an aura of history. There were no photographs at certain points in history, so these drawings qualify as secondary sources or pictures drawn by textbook artists to create something out of the past. For example, the colonisation of the Cape in the 18th century is a period of time that could only be captured from old books (such as drawings, paintings) and documents (such as journals, letters, diaries) and oral sources (people who lived at the time and who spoke to others who recorded their experiences). There are not many primary sources that are still available for historical reconstruction or evaluation. It is not acceptable to argue that the past did not exist simply because there are no primary sources of certain events. For this reason, a drawing is presented of the early Cape harbour (Grade 7) so learners can use their present knowledge of the developed harbour to understand how change has affected the area. Ideas of change and continuity and cause and effect are scaffolded in these images, supporting tasks and content.

A brief definition is provided to distinguish between primary, secondary and tertiary sources so that it becomes clear that in this section only pictures and photographs that are not labelled as a 'source' are analysed here. Later, a more in-depth assessment is made of how sources are used in the sampled textbooks.

The University of Sydney (2012) distinguishes between primary, secondary and tertiary sources on the basis of their relative proximity to the original event or experience. A primary source is a one closest to the event, research or experience. It includes items such as an original letter, journal entry, poem, amongst others. A secondary source of evidence is one step removed from the original source, and is usually based on the primary source. These can also be drawings, a textbook, a novel, amongst others items. A tertiary source is one more step removed from the original and is usually based on a range of secondary sources, like a journal article, a textbook or a book of reviews, amongst others (*ibid.*).

There are contemporary artists who create pictures, portraits and drawings of what they imagine life was like a century earlier. Although these kinds of images or visuals are created to 'look' like primary sources or appear 'historical' by virtue of the colours, attire of protagonists, architecture of buildings and the structure of objects, they are considered as secondary sources of information about the past but can still serve the purpose of re-creating the past as an image.

The textbook has to present engaging questions to learners to lead them towards unpacking the 'contents' of the picture or photograph. If the pictures are simply 'ornaments' for the page to wear, then the learner might appreciate their aesthetic value without realising their potential as an information signal. When pictures are 'mined' or engaged with at deeper levels, they bring historical value and significance to light. The implications for pedagogy include teacher awareness of the function of these 'ornaments' with which they can pursue alternate methodologies to unpack their true value for the learner of history.

Since the results of the analysis show the main placement of pictures or photographs in the Expressive Domain, this translates into a generic use for them, foregrounding generic procedural knowledge, especially noted in the higher grades. By contrast the lower Grades of 3 and 5 have higher placements in the Esoteric Domain, which indicates greater engagement with images using specialised procedures. The cause for this can be attributed to the type of history taught in the formative years. The history in the lower grades is far more localised and simple (contextualised learning). As it advances to higher grades, it becomes more complex and it is far more difficult to capture the passage of years in an image. Advancing grade history leads to the formation of new situations, increasing events, more people and greater boundaries which are far removed from the locality that is prevalent in the lower grades (decontextualisation). Time and space have moved out of the learner's immediate family and circle to outside of their local environment, traversing greater and longer distances away from their provinces to include countries outside their own. The process is made more complex as the events and activities under study shift from the objects, writings and people in the vicinity, to larger, intensive events such as world colonisation, more people (generalised and specific participants in history) and even

more written documentation. Images help to contextualise some of the history which is far removed from the learner's experience of space and time.

The Grade 8 textbook presents a large number of photographs which are historical in content. They are in black and white and show real people, buildings and surroundings which allow learners to experience some of the reality. But these photographs are presented with minimal information. As evidence of the time, photographs and their captions ought to inform learners about the year the photo was taken, by whom and for what purpose. This is followed by a process of establishing authenticity, leading to evaluation and then to interpretation. The learner then works as a historian using available evidence to construct historical accounts. Photographs in this textbook constitute primary sources of evidence which involve interrogation towards the formulation of opinions and perspectives. Lack of provenance is perhaps the reason why there is a focus on generic procedures when learners engage with these images.

Figure 7.11 shows a picture coded within the Public Domain.

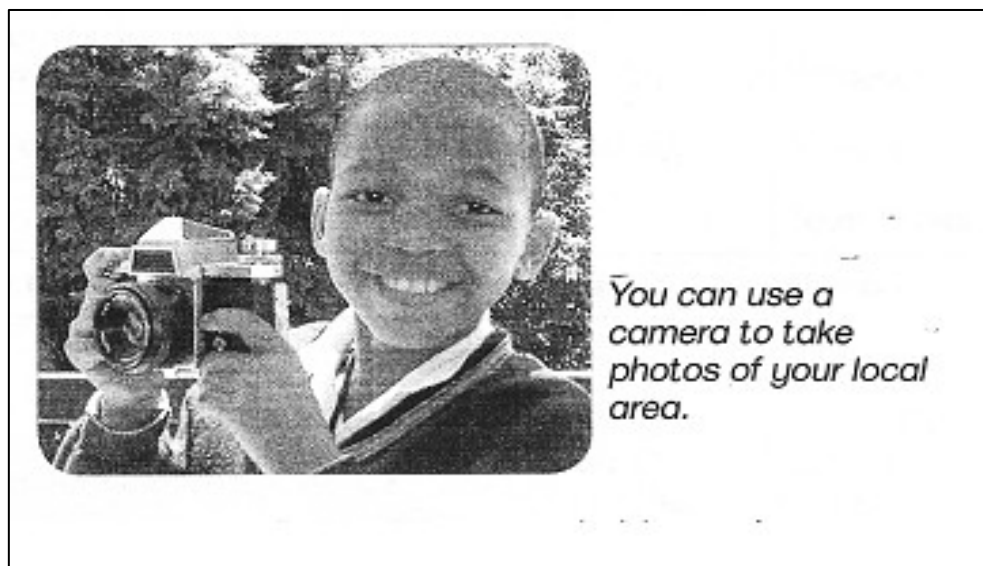


Figure 7.11 A picture coded within the Public Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner's Book, p. 35

This picture is coded into the Public Domain because it is not specialised to history. It could be transported quite easily into any subject area or textbook. Its caption reads “You can use a camera to take photos of your local area” and the school attire is the current dress at any school. The mention of the local area is related to history, as this particular chapter deals with how learners can get information about and from their local environments. The language is unspecialised, though one could argue that mention of the local environment in the caption presents the content of the image with some spark of historical content. The caption itself could also move across to another subject. The content of the picture being analysed here is not specialised to history and it is located in the everyday. One can encounter such an image in any ‘modern’ environment. Learners are not asked any questions about the image. It is merely used as ‘decoration’, which is why it is coded as generic procedural knowledge. Learners do not engage with the picture in any meaningful way. If they were asked how a photograph constituted ‘evidence’ in the construction of a particular story, it would involve some measure of procedural skill. This would then reflect some development in historical thinking. The picture is not used as a ‘source’ in a historical sense and is, therefore, coded in the Public Domain because both its content and language is not specialised to history.


Figure 7.12 shows a chunk of information/paragraph coded within the Expressive Domain.

Word bank **A B C**

dates a way of describing a point in time, e.g. April 1994
graveyard place where dead people are buried in the ground

1. Information from pictures

Samantha and Desmond looked in an old photo book for old pictures of their school. They found this picture from 1972.



Classroom activity 2.2 A Standard 5 class at the Bez Valley Junior School in 1972

Figure 7.12 A chunk of information/paragraph coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner's Book, p. 28

The above picture is coded within the Expressive Domain because, while the content of the picture is clearly historical (old style uniforms and appearance of photo), and the language is specialised to history (old pictures, 1972), the learners are asked general information about the numbers of girls and boys in the picture. They are not required to engage with the authenticity of the picture and the reasons for it being taken or what it tells us about schooling in 1972.

Figure 7.13 shows a picture/photograph coded within the Descriptive Domain.

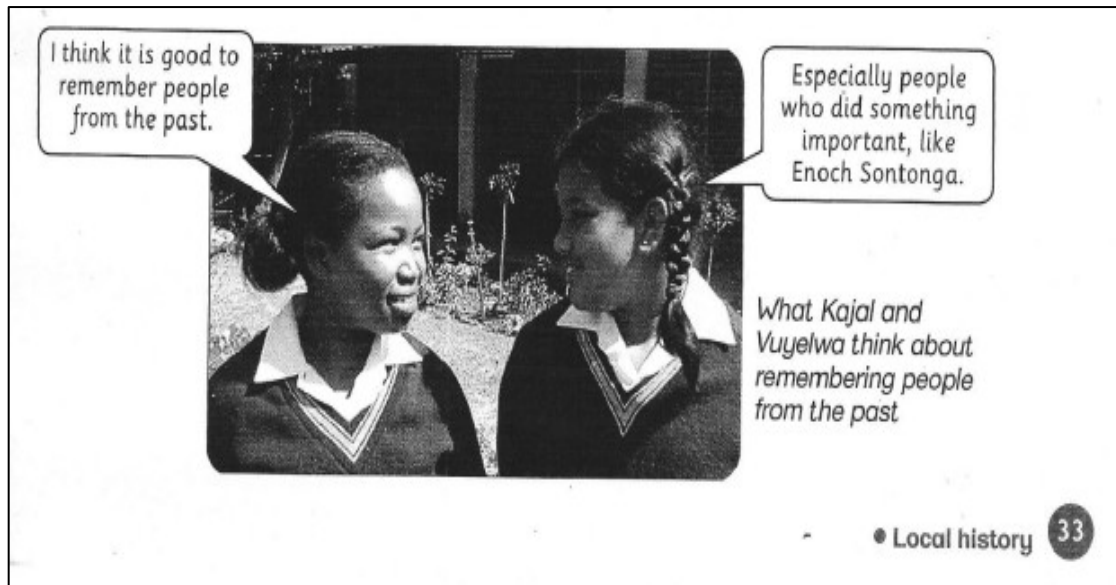


Figure 7.13 A picture/photograph coded within the Descriptive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner's Book, p. 33

The above picture was coded within the Descriptive Domain even though it appears to belong to the Public Domain. It represents two learners from an everyday school scene. Their conversation is about the past, more specifically about Enoch Sontonga. Nothing more is said about the reasons for which Enoch Sontonga is recognised or his contribution to the national anthem of South Africa. This conversation is more of an everyday discussion which makes reference to a person from the past. What is visible in the speech bubbles and the knowledge segment alongside the picture indicates content that is not historical and language which is unspecialised. The way in which the reader/learner is directed to the picture foregrounds a specialised procedure. There is acknowledgment of historical significance by the recognition of people in the past who made important contributions to history. Since procedural knowledge is being developed, conditions are clear for a coding in the Descriptive Domain.

Figure 7.14 shows a picture/photograph coded within the Esoteric Domain.

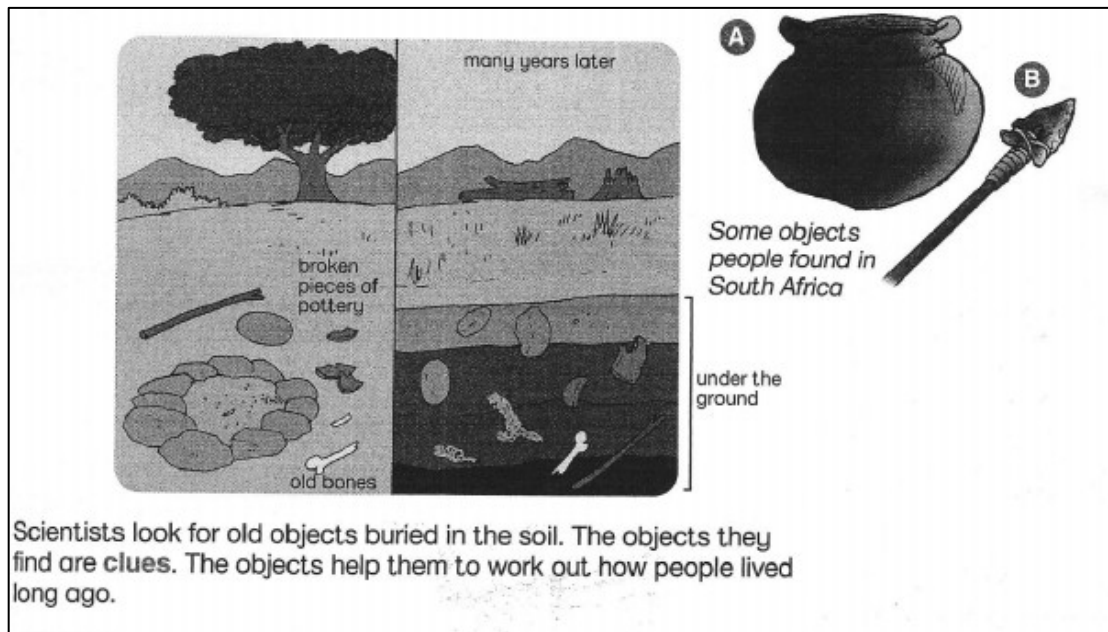


Figure 7.14 A picture/photograph coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all. Grade 5. Learner's Book*, p. 27

The picture above is coded within the Esoteric Domain because the content is clearly historical. Items in the picture labelled A and B are not everyday objects. The caption of the picture refers to old objects that scientists look for and how they are clues to create stories of people who lived long ago. Reference is made to broken pieces of pottery and old bones buried over time. The language is weakly specialised (how people lived long ago, old objects) and the details of the picture link to a phenomenon of history: an archaeological dig in an unfamiliar context. This is a Grade 5 textbook where simple language is used to convey historical knowledge about how objects discovered in the earth can be used to create a story about the past. Simple, concrete language or everyday language often serves as a vehicle for the transmission of historical knowledge. The word 'artefact' is not used here or in any other history textbook, perhaps because it is a semantically dense concept which would require more explanation. The point is that here there are critical disciplinary skills that are being developed using the picture. The old objects tell a story of the past, creating the opportunity for the construction of a story. The second half of the picture shows time lapse in the statement "many years later", fostering 'change and continuity' and cause and effect' concepts. The procedures are specialised procedural knowledge, showing

how an archaeologist can excavate below the surface of land to find evidence of how people lived in the past. By locating objects and artefacts a story can be constructed about who lived in that area, what their lifestyle could have been like and what they used specific objects for. It points to the ‘Use primary source evidence’ benchmark in Seixas (2006) where learners can use objects to piece together a narrative about the lives of people in the past.

While this picture has historical content, it also fosters procedural knowledge. It has not been labelled as a ‘source’ in the textbook and therefore appears in this section of the analysis. It is used as a ‘generic source of information’ for the learner to get an idea of how the people of the past lived and how archaeologists weave through the objects/artefacts to construct a story about the early lifestyle of indigenous inhabitants. It is a drawing which forms part of the learning devices used by textbook writers to invoke visual learning in history. It is not a primary source but is created for the purposes of learning about the earliest inhabitants of South Africa in a time when no cameras existed to capture these moments of history. The introductory page for Grade 6 textbook analysis, which shows a real archaeological dig, adds a sense of reality for the learner. In the Grade 6 textbook the fossils and other objects taken out of the ground from African societies are called ‘objects and not ‘artefacts’.

4. Cartoons

Table 7.6 shows the number of cartoons institutionalised in each textbook

Table 7.6 Number of cartoons institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (100%)
Expressive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total Number of Cartoons	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (100%)

The inclusion of cartoons in this segment of the analysis is important. Even though there are no cartoons in earlier textbooks, their eventual inclusion in the Grade 9 book indicates something important about the reasons for this. It ties in with the level of understanding and ability of the learner to engage with cartoons, particularly political cartoons which use satire which may not be understood by very young learners. Before exposure is attempted, there needs to be a base of understanding about situations, events and important people. A solid background knowledge (substantive dimension) of causes and effects would allow the learner to be able to ‘read’ satire and explain complex situations. It is therefore unsurprising that a learner in Grade 9 interacts with a cartoon like the one shown below in Figure 7.15. The learner is at the required maturity level and has acquired the base level of knowledge to tackle inferences.

Figure 7.15 shows a cartoon coded within the Esoteric Domain.

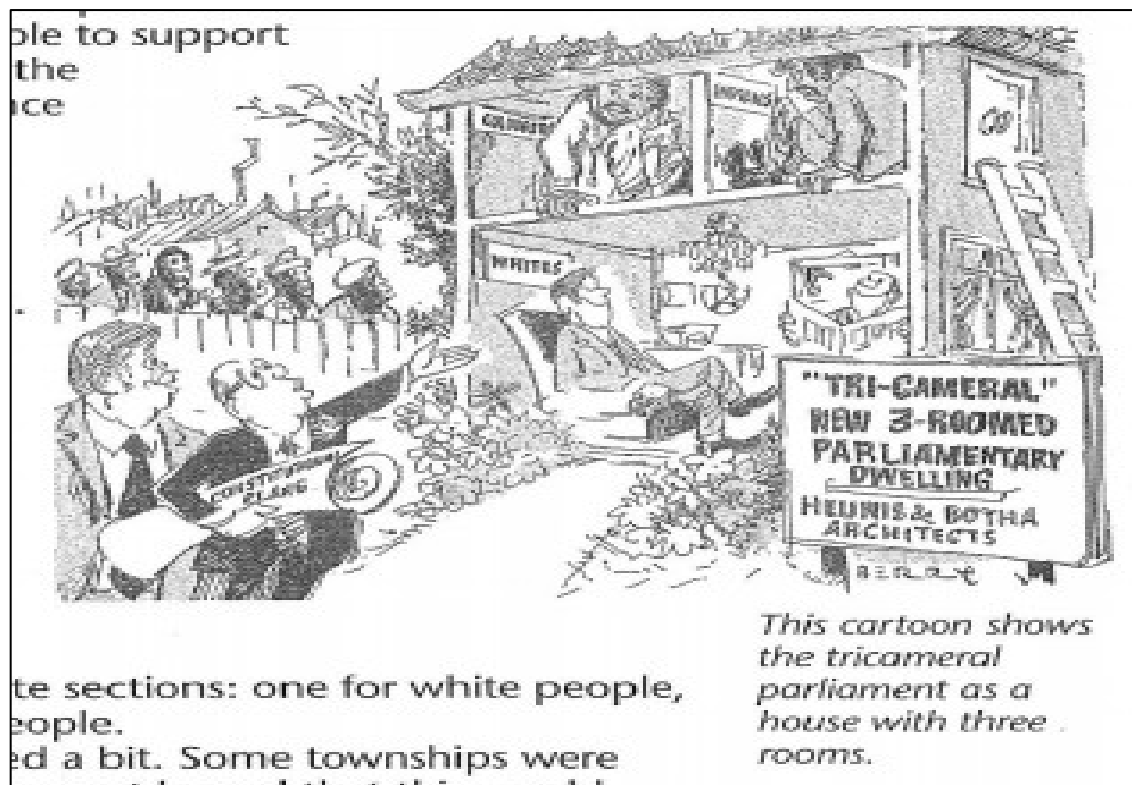


Figure 7.15 A cartoon coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 9. Learner's Book, p. 221

There is evidence of only one cartoon in all seven textbooks. Learners in Grade 9 are at the level when lessons ought to be lively and stimulating and cartoons have the effect of introducing humour, away from the mundane routine of 'read the following extract and answer the questions'. Barat (2012) argues that political cartoons are effective primary sources that teach learners how to recognize and understand symbolism, perspective and bias. Although this cartoon is not labelled as a source it is could be considered a primary source. Items that are labelled as 'sources' are engaged with in a later section. There are no details about the cartoonist with which learners can engage and the date of publicatiois unclear. Such details are necessary in order to classify it as a primary source.

According to the *Teacher's Guide to Primary Source Set*, political cartoonists use their skill to express their opinions on political issues. They always have a point to make and use certain techniques like paintings, symbols, caricature, irony, and exaggeration to communicate this message. Designed to stir up controversy, the

cartoon nevertheless contributes to the understanding of the issues addressed in the depiction. Pupil engagement with a political cartoon, notwithstanding its satirical function, can lead to a deeper understanding of the issues, directly or indirectly expressed, as well as the historical context which is depicted. The effect of the cartoon is only achieved if learners already have a preliminary or substantive knowledge base on the protagonist/s and the circumstances. Although a cartoon is someone's view of the events, issues and circumstances, it creates an opportunity for students to engage with the issues, events and circumstances. Discussion about the cartoon's reliability and credibility can create a very interactive and lively history class, providing fertile ground for debate and argument. Political satire involves higher order thinking, engaging learners to consider opinions that are actually multi-perspective. The kinds of views contested are those of the cartoonist, those who buy into the message of the cartoon and those who consider it a perception, not a fact. A great deal of controversy around cartoons can turn a history lessons into a political minefield where contradictory political beliefs are presented. Political cartoons are by their nature biased and have to be read as such. There is a construction of disciplinary skills that are necessary for a history classroom. The cartoon presents one perspective, that of the cartoonist or sometimes even the views of many people. The important point is that the critical second-order concept of multi-perspectivity is embedded in the objective of the teaching of history. Learners have the opportunity to engage with a perspective and can formulate their own opinions.

The fact that this cartoon has been placed in a Grade 9 textbook means that it has content knowledge and it has a perspective that can be analysed and interpreted by a learner at this grade. It is placed in Unit 3 which deals with the "1990: Release of Nelson Mandela and the unbanning of liberation movements". It appears in a sub-section entitled "Government reforms". The cartoonist uses drawings to submit an opinion and is clearly not suitable for lower grades. It involves higher level processing on the cognitive scale, including analysis, interpretation and evaluation of the cartoon and a set of circumstances and these skills depend, in particular, on the learner's substantive knowledge of the tricameral parliament. The cartoon creates an analogy between the parliament and a three-roomed house. This is used to good effect, as learners are able to visualise and describe the system. The example is coded in the

Esoteric Domain because its content is clearly historical. The language is also specialised to history as ‘tri-cameral parliament’ is not an everyday word. It is a word drawn from the learners’ substantive history knowledge. The specialised procedural knowledge also advances historical thinking, as it involves the understanding and engagement of both substantive and procedural knowledge.

Cartoons can, therefore, be very effective in developing historical thinking, requiring the combination and understanding of both facts and processes in history. That it will be comprehended as intended, is not guaranteed. There are some learners, even in higher grades who struggle with higher level tasks and this cartoon may not necessarily be understood. Where the learner is unable to contextualise the information and interpret it, the teacher has to unpack its meaning by explaining the function of the constituent parts and processes of the cartoon.

5. Activities/Tasks

Table 7.7 shows the number of activities in each textbook and the percentages of institutionalisation in each:

Table 7.7 Number of activities institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	1 (8%)	2 (8%)	12 (31%)	7 (16%)	7 (16%)	4 (5%)	19 (26,4%)
Expressive Domain	7 (54%)	2 (8%)	15 (38%)	25 (58%)	29 (64%)	40 (55%)	37 (51,4%)
Descriptive Domain	0 (0%)	1 (4%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	5 (38%)	21 (80%)	12 (31%)	11 (26%)	9 (20%)	29 (40%)	16 (22%)
Total number of Activities	13 (100%)	26 (100%)	39 (100%)	43 (100%)	45 (100%)	73 (100%)	72 (100%)

Activities are composed of smaller questions and cannot be coded as a whole because each question in the activity requires different types of skill and knowledge. This level of the analysis therefore involves the coding of every question in the activity. Note the

examples provided below and how they were coded as T1 (Task 1), T2 (Task 2) and so on. The findings in Table 7.7 show that the number of tasks for each grade increases as the grade shifts higher. The coding in the Descriptive Domain remains very weak with only Grade 4 achieving 4% of the tasks which are not specialised to history, which are located in the everyday and contain unspecialised language. A greater percentage of tasks in the Grade 5 and Grade 9 textbooks feature in the Esoteric Domain. This is the desired quadrant for fostering high level historical thinking where all conditions are suitable for the language, content and procedures to induct learner's appropriately into the discipline of history.

The 26,4% of tasks in Grade 9 coded in the Esoteric Domain and 51,4% in the Expressive Domain indicate a total of 77,8% of the content of the tasks which is historical and language which is specialised. That 26,4 % of the tasks are coded in the Esoteric Domain indicates that many of the tasks actually develop generic skills rather than foster historical thinking as the domains of practice seem to suggest. The difference between the Esoteric and Expressive Domains lies in the procedural knowledge which can be either specialised in the Esoteric or generic in the Expressive domain.

The results in Table 7.7 show that the majority of tasks fell into the Expressive Domain. This implies that the tasks had the necessary historical content and that even the language was specialised to history. But the gap was created by the lack of procedural skills which are supposed to be inculcated in learners in the subject of school history. Thus, there is a vacuum in the area of specialisation.

Of great concern is the Grade 8 text which showed 40% of its tasks in the Public Domain which means that these tasks have content which displays neither historical content, nor specialised language, but rather appears to be in everyday language. Generic procedures are also present in 40% of the tasks. That 80% of the tasks are coded in the Public Domain for the Grade 4 textbook can be attributed to the process of teaching and acclimatising learners to the idea of learning history in their first year when they officially start learning history and geography in the new subject of social sciences. It is necessary here to introduce basic ideas and tasks begin to lean towards

disciplinary skills. The findings seem to suggest that textbooks do not develop the materials to harness historical thinking, but greatly enhance the appearance of the content in the textbook by including many tasks. Pedagogically, the effort of the history teacher has to double, to make up for the gaps that are really due to the lack of development in specialisation of skills in history.

Figure 7.16 shows a task (T1) coded within the Public Domain.

o How many forms of transport can you see in this picture? } T1

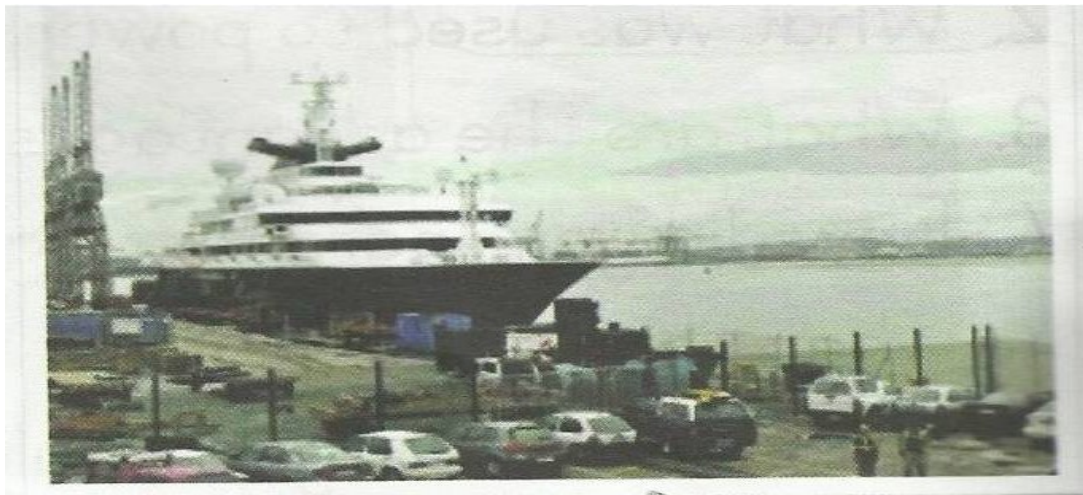


Figure 7.16 A task (T1) coded within the Public Domain


Retrieved from *Shuter & Shooter, Top Class Life skills*. Grade 3. Learner's Book, p. 52

The task is coded in the **Public Domain** because the content knowledge is not specialised to history but is located in the everyday, the language is not historical and therefore unspecialised and requires general knowledge to answer it. The generic procedural knowledge also supports the coding choice.

Figure 7.17 shows a task (T3) coded within the Descriptive Domain.

o What clothing are the people wearing? } T2

T3 { Look at the picture of Durban harbor today? How has it changed?



P 30

Figure 7.17 A task (T3) coded within the Descriptive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner's Book, pp. 28–29

Task 3 above is coded within the **Descriptive Domain** because the content knowledge is not specialised to history but is located in the everyday; the language is also not specialised, while the procedural knowledge does lead the learner to develop an understanding of how things changed over time to a building in a place they might not be acquainted with. There is thus some development of historical thinking, albeit on a smaller scale.

Figure 7.18 shows a task (T31) coded within the Esoteric Domain.

Classroom activity 6.10

Work on your own and answer these questions.

1. Do you think the conditions the VOC put on the free burghers were fair? Explain your answer. } T31

2. Why do you think the VOC made the conditions so strict?

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Figure 7.18 A task (T31) coded within the Esoteric Domain

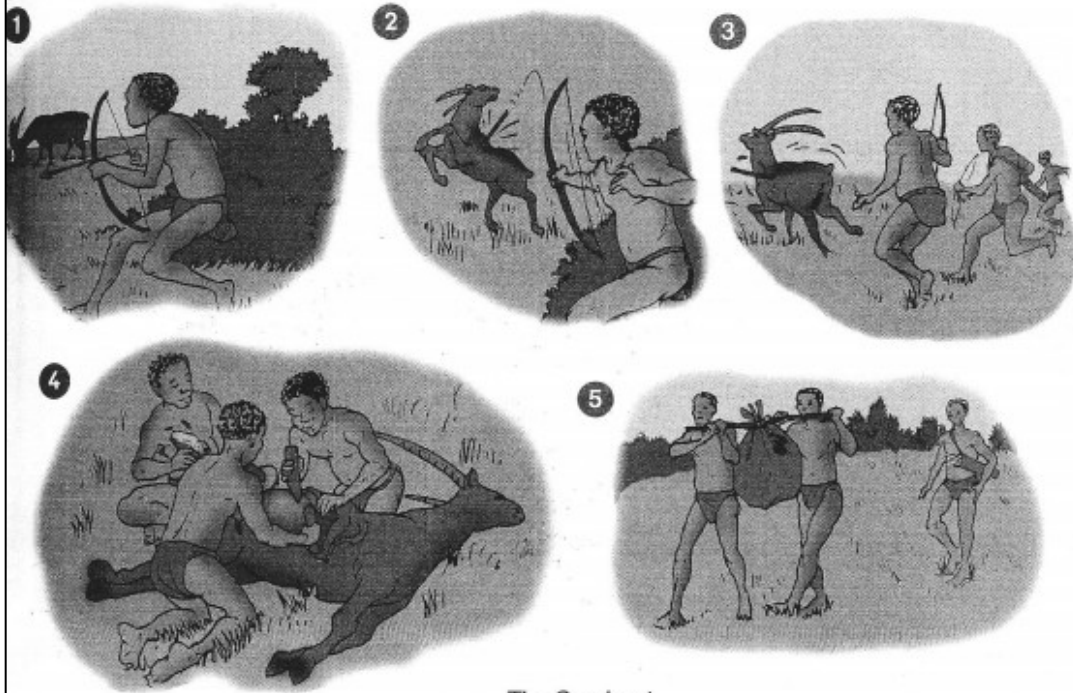
Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, p. 136

The task below is coded as within the Esoteric Domain because the content is clearly historical. It concerns the VOC and the free burghers, indicating a historical context and time. The language in which it is couched is clearly historical. The content of the task constitutes an understanding of the conditions of the free burghers as well as the nature of the VOC rules (indicating the substantive dimension of the task). The learners are required to give their interpretation or perspective on the fairness of the conditions of the free burghers. This calls for empathy on the part of the learner which draws on the understanding of the context and the events surrounding it, in order to deliver a perspective. It also demands a fairly strong substantive understanding of all the free burghers' previous association with the VOC and its rules in order to give a balanced verdict. Apart from the intention that learners develop a moral perspective to the history presented, the learners are also made to present a personal perspective in this task, thus two procedural key constructs of history are developed: that of 'taking a historical perspective' and obtaining a 'moral perspective'. The coding in the Esoteric Domain is thus due to all the conditions of a specialised history content, language and procedure being firmly historical in nature.

Figure 7.19 shows a task (T23) coded within the Expressive Domain.

2. How the San hunted

The San were excellent hunters. They invented bows and arrows. The bow and arrow helped the San to become better hunters. The San put poison on their arrows. They used their knowledge of plants and animals to find very strong poisons. The poison made the animal weak and easier to follow. The diagram below shows important parts of the hunt.



The San hunt

Classroom activity 2.4

1. What weapons did the San use to kill big animals? } T23
2. a) Tell your partner what is happening at 1 to 5 in the drawing above. } T24
b) Write the numbers 1 to 5 down your page. Write one sentence to explain what happens at each number.

Figure 7.19 A task (T23) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 5. Learner's Book, p. 31

The task above is coded in the Expressive Domain because the content knowledge is historical and the language specialised to history. However, the learner has to look at the pictures to find the answers, which involves a generic skill of reading the task, and identifying and extracting information. Since the task involves generic procedural knowledge, the quadrant placement is clear. Perhaps a question seeking reasons for why these weapons were used could have added a deeper level of understanding.

6. Maps

Table 7.8 shows the number of maps in each textbook and the percentages of institutionalisation in each:

Table 7.8 Number of maps institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	3 (43%)	0 (0%)	0 (0%)
Expressive Domain	0 (0%)	1 (100%)	1 (100%)	7 (100%)	4 (57%)	5 (100%)	0 (0%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total Maps Coded	0 (0%)	1 (100%)	1 (100%)	7 (100%)	7 (100%)	5 (100%)	0 (0%)

The results of the map analysis show that the use of maps is limited across all seven textbooks for the chapters under investigation. Even where they are used, learners engage with them in very generic ways in that they merely have to read or look at them. There are no tasks or questions based on them. For example, in the Grade 4 textbook, a map is shown but it is used as an accessory. It is captioned as ‘map’ and the knowledge segment informs learners that maps give us information, but it does not make clear to them what information maps provide.

Maps are important in history because they are used, in this case, to show learners what South Africa looked like (geographical and political divisions) at a particular point and time in history. The maps focus on the physical changes to the borders of places and countries as different people colonised those areas. Maps are also used to show learners the place of South Africa in the space of the world (world map). There are very limited map-related activities with questions based on the procedural aspect of history. The only question that is linked to procedural knowledge is integrated with those that are particular to geography. See the Figure 7.21 example below. The activities are about the position of tribes and how their crops were influenced by seasonal rains.

Figure 7.20 shows a map coded within the Expressive Domain.

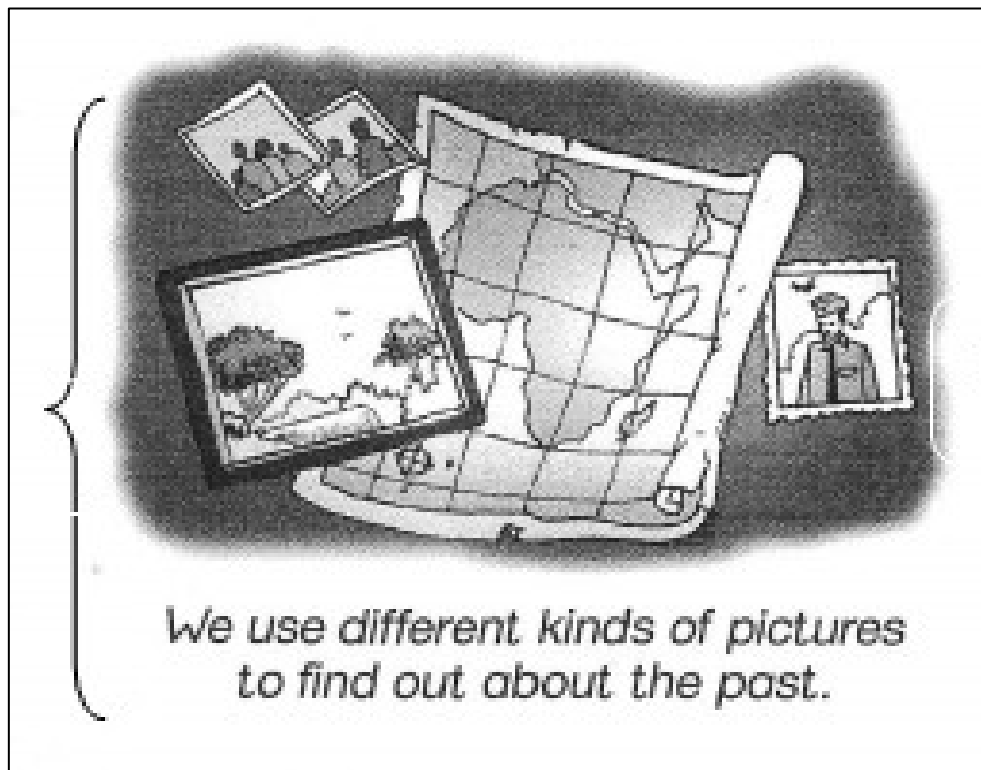


Figure 7.20 A map coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all. Grade 4. Learner's Book*, p. 26

In this example of a map featured in the textbook is used in a very generic manner. Learners are simply shown this image as “kinds of pictures used to find out about the past” (caption). The content is historical, as it gives the learner information about the past (pictures, drawings, photographs and maps) and this can be viewed in the picture. The caption describes the function of the image. The language is specialised to history and since the procedural knowledge is generic, the image is coded in the Expressive Domain. There is nothing about how these pictures that is used by historians, reflecting a very generic approach. This is why it is located in the Expressive Domain.

The following two figures show the use of maps in the Grade 7 textbook.

Unit 1 Indigenous inhabitants of the Cape in the 17th century

H2

Word bank

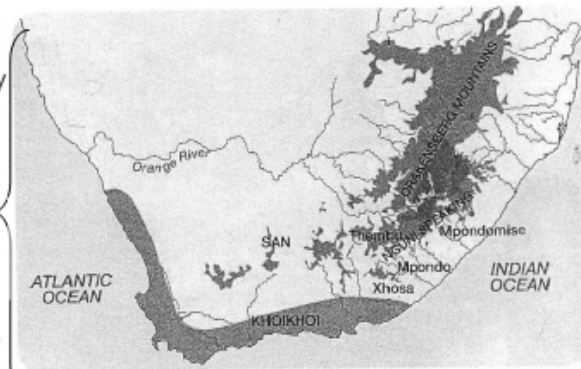
A B C

indigenous original; first
inhabitants people who live there

WBI

In the 17th century, there were three groups of people living in the Cape, before Europeans arrived:

- The San were the earliest people to live at the Cape. They were hunter-gatherers. They hunted wild animals and gathered wild plants to eat.
- The Khoikhoi people moved to the Cape from the north about 2 000 years ago. They hunted animals, but were also farmers. They kept herds of cattle and sheep. They moved from place to place to find land for their cattle to graze. They fought with the San, because both groups needed the resources of the land to survive. Over time, the San moved into areas that were drier and had more mountains. Some of them became part of the Khoikhoi society and married Khoikhoi people.
- Other groups of people lived in the Eastern Cape. They spoke Nguni languages. They also grew crops and herded cattle. These groups included the Mpondomise, Mpondo, Thembu and Xhosa. The Xhosa lived closest to the Khoikhoi.



This map shows where the indigenous inhabitants of the Cape lived.

Classroom activity 6.1

Work in pairs. Copy the table into your exercise books and fill it in. You might need to remember what you learnt about in Grade 5.

Factor	The San	The Khoikhoi
How did they get food?		
Where did they live?		
What tools did they use?		

T5

Unit 2 Where African farmers were settled

H3

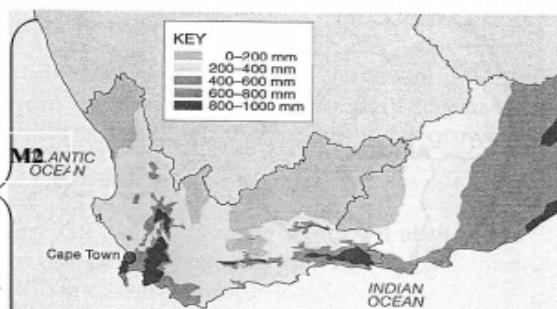
Word bank A B C

millet small-seeded grasses used as cereal crops
sorghum species of grass used for grain or fodder

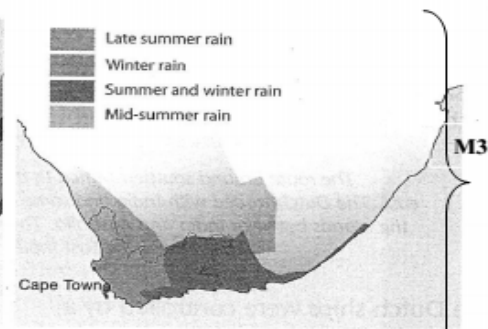
WB2

The African farmers grew crops and kept animals. The most important crops were millet and sorghum. They ate the grains and made beer from the sorghum. Millet and sorghum crops need 500 mm of rainfall a year. They also grow best when the rain falls in summer, so do not grow well in the southern part of the Cape, which gets rain in winter.

K2



This map shows how much rain the different areas of the Cape get.



This map shows which areas of the Cape get rain in the summer or the winter.

Classroom activity 6.2

Work on your own and complete these tasks.

1. Draw a map of the Cape. Use the two maps on this page to help you.

Fill in these details on your map:

- Where the Khoikhoi lived } T6
- Where the San lived } T7
- Where the Xhosa lived } T8
- Which areas get the most rain } T9
- Which areas get rain in summer } T10

2. Answer these questions, using your map:

- a) What do you notice about where most people lived? } T11
- b) Which areas would be the best for growing millet and sorghum? } T12
- c) Who lived in the areas that were best for growing millet and sorghum? } T12

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Figure 7.21 Maps (M1, M2, and M3) coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, p. 122,
Social Sciences. Solutions for all. Grade 7. Learner's Book, p. 123.

All three of the maps (M1, M2, M3) above are used in conjunction with each other to support the development of historical thinking. Although the Classroom Activity 6.2 requests that learners use the two maps on page 123 (M2 and M3), the activity cannot be completed without working with Map 1. Map 1 shows where the indigenous inhabitants of the Cape lived in the 17th century, while Map 2 shows how much rain

the different areas of the Cape get. Map 3 shows which areas of the Cape rain in the summer or the winter. While Map 1 shows learners where the different tribes in South Africa were located, it is not accurately displayed, as there is only one colour showing the placement of the Khoikhoi. The Drakensberg Mountains erroneously appear in a different colour, which perhaps has something to do with the location of another tribe in this region but the map does not make this clear in the absence of a key. The position of all the tribes should have been represented to understand the location of each. The conventions of maps are not adhered to in Map 1, challenging the objective of understanding the location of tribes. A key would have been invaluable in explaining tribe location. The fact that colour is used for only one tribe out of a variety of local tribes, creates a further challenge to follow and understand the location of others. In addition the absence of a map scale makes it difficult to gauge the size of the entire sub-continent and, specifically, the size of the area occupied by a specific tribe in relation to the next. The inclusion of map conventions might have created better scaffolding for learners to understand the size of the tribe per square kilometre as well as the location. This is cannot be seen clearly.

Casting this error aside, the maps are nevertheless coded in the Esoteric Domain. This choice is grounded in the kind of activity presented with the maps which requires the specialised use of maps. Once the understanding of the tribe location is established, Map 2 shows which areas get the most rain. This would influence the type of crops that could be grown and yielded there, as would the area's geographical location. The movement and settlement of people is thus shown to depend on a combination of factors. This understanding is furthered by Map 3 which shows which areas of the Cape get rain in summer and winter. Learners can then explain why the rains at particular times would affect both the growth of certain crops and hence the location of tribes with a need for certain crops. Maps 2 and 3 appropriately present a colour-coded key which is vital for developing the understanding of the maps.

In this activity, there is also increased use of geographical skills like map reading, scales, coding, use of keys, and analysing crop growth and sustainability and so forth. This integration is necessary to build on the transferability of knowledge. Some information presented in the subject of history can only be understood if geographical

understandings are used in tandem. The union of knowledge and skills can only serve to advance the learner in both areas of study. Information in all three maps is combined in the activity, building a greater understanding of location, climate and crops in a historical era. Since the content is clearly historical, the information is built around tribal distribution and related factors, the language is specialised to both history and geography: How would a historian know why groups of people lived in specific places at a particular time in history? How would a historian know that the San is nomadic and why they moved to specific areas? The movement of people is tied to their lifestyle, and the converse is also true. The causes of particular natural phenomena resulted in the initial location of indigenous people. The later movement of people is the effect of the initial cause (cause and effect). Since the procedural knowledge is specialised to both subjects, it allows for the coding choice of the maps to be in the Esoteric Domain and the activity works to extend each one in a specialised way.

7. Case studies

Table 7.9 shows the number of case studies in each textbook and the percentages of institutionalisation in each:

Table 7.9 Number of case studies institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (100%)	0 (0%)
Expressive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	2 (100%)	0 (0%)	1 (100%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total Case Studies coded	0 (0%)	0 (0%)	0 (0%)	0 (0%)	2 (100%)	1 (100%)	1 (100%)

The results of the analysis of the case studies in the chapters show limited use and that they take on the appearance of a source. The lower grades have no case study presentations. This is because the topic of the chapter may not be amenable to this kind of presentation. However, case studies present important story formats of

information which should commence at earlier grades to accustom history students with the format, style and presentation of information. Most importantly, learners would get access to more substantive content with a story line rather than just chunks of information with no story. The history of the earlier grades appears as contrived or forced ‘bits of information’ which learners have to learn because it is in the curriculum and these are the facts of history. There is little engagement with different perspectives because the information is presented as facts to be learned. The Grade 6 history about the European explorers is an example of how a chronological piece of history can be presented without question. Is there any way in which learners can contest this? What evidence exists in the form of primary sources that can prove this actually happened? The furthest one can get is an earlier textbook or book that describes the key figures of early explorers and their expeditions. The idea of ‘doing history’ in this grade, within this chapter, is challenging. As the grades proceed there seems to more real life application, which is more convincing and not as contrived as the earlier grade presentations are. Case studies bring to the lesson this ‘human’ element and since the CAPS social sciences (DoE, 2011b, p. 11) focuses on the “different ways in which people today see actions and behaviour of people in the past”, they bring a human perspective to the discussion. The purpose of a case study in history is to ground it in a clear context, making it more concrete by relating it to a specific individual’s experience. History, in this sense, always moves from general participants to the experiences of a specific person or individual.

Some of the case studies are narratives written for the textbook by the writers to draw attention to a particular individual and their experience of events. In others, there are websites referenced as sources of information and a particular case study includes an excerpt from a book published by Kros and Segal in 2009. The format of the case study breaks what appear to be paragraphs of historical content while providing content of its own.

Figure 7.22 shows how case studies (CS1 and CS2) are coded within the Expressive Domain.

Case study: The story of Galant's rebellion

Galant was a slave owned by a cruel farmer named Van der Merwe who beat his slaves and treated them very badly. In 1825, 25-year-old Galant and the other slaves heard that the colony might abolish slavery. They thought that they might be freed. But then Galant heard Van der Merwe saying that he would never give his slaves their freedom. Galant realised that he might be a slave for the rest of his life. He organised the slaves on nearby farms to rebel against their masters. Galant and the other slaves killed Van der Merwe and two other white people. Then they fled into the mountains nearby.

A group of soldiers came from Cape Town and caught Galant and the other slaves. They went on trial for murder. At the trial, Galant and the other slaves told the court how Van der Merwe had treated them. He told them that he had complained to the authorities about the cruelty three times but nothing had been done. The court found Galant guilty of murder and he and two other slaves were executed.

CS1

© Topic 6 Colonisation of the Cape 17th-18th century

Case study: The 1808 rebellion

In 1808, a slave called Louis led a rebellion. He was very light-skinned, and many people thought he was white. He led a group of slaves and Khoikhoi people to Cape Town, where they planned to take over the store of weapons. Then they planned to talk to the authorities about peace and freedom for all slaves.


They marched to Cape Town, gathering over 300 slaves and Khoikhoi servants along the way. When they got close to Cape Town, they were met by a group of soldiers. The soldiers were armed and they defeated the slave group. They captured 327 of the rebels and put 47 of them on trial. Altogether, 20 rebels were sentenced to death. Others were put into prison for taking part in the rebellion.

CS2

Classroom activity 6.8

Work on your own. Read through the two case studies about slave rebellion and then answer these questions.

1. Why did the slaves in each rebellion rise up against the slave owners?
2. What was the aim of each rebellion?
3. Explain why the rebellions failed.



P10

Slaves were not allowed to own guns, so they often armed themselves with farm tools.

Figure 7.22 Case studies (CS1 and CS2) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, pp. 133–134.

These case studies are the only ones in the chapter. Both of them are coded in the Expressive Domain because their content is historical (it is about slavery), the

language is specialised to history, but the procedures, once again, do not require much from the learners as historians. The skills used in this task are the generic reading of information and the questions are lower and middle order. It requires learners to read the information given and answer questions like an ordinary comprehension passage.

Figure 7.23 shows how case study (CS1) is coded within the Esoteric Domain.

Word bank A B C

loincloth	cloth worn by men between their legs	} WB9
pneumonia	a disease of the lungs that can be cured if treated properly	
silicosis	a disease of the lungs that cannot be cured	

Mahudu Nkadimeng – a migrant worker

In the early 1900s, Mahudu Nkadimeng left Sekhukhuneland (today a district of Limpopo Province) and came to work on the gold mines as a migrant labourer. As a migrant worker, he rarely saw his family, and his son, John, grew up not knowing his family.

Men came to work on the mines as migrants for many reasons. This extract from an interview conducted by historian David Coplan provides one explanation of why men came to Johannesburg:

‘I wanted to put on my trousers. I was ashamed of my loincloth, mostly because all the boys of my age were already regular miners that came back in their trousers, smoking cigarettes and speaking strange languages, relating exciting stories about their adventures.’

(Source: Coplan, D. (1985). *In Township Tonight*. Johannesburg: Ravan Press.)

Mahudu Nkadimeng worked underground in the mines. Conditions underground were brutal. Both black and white underground workers faced the possibility of death through accidents in the form of rockfalls or from a number of respiratory diseases like TB, pneumonia and silicosis (phthisis). Mahuhu Nkadimeng contracted silicosis from working underground. After a month-long, nightmarish journey on a donkey-cart, he returned home to Sekhukhuneland where he eventually died of the disease.

(Source: <http://www.apartheidmuseum.org/sites/default/files/files/downloads/Learners%20book%20Chapter1.pdf>
[Last accessed 18 June 2012])

Classroom activity 6.13

Work on your own. Read the case study about Mahudu Nkadimeng and answer these questions.

1. This case study gives one miner’s reason for becoming a migrant worker. Give this reason in your own words. } **T47**
2. What other reasons (not mentioned here) did people have for becoming migrant workers? } **T48**
3. What dangers did Mahudu Nkadimeng face underground? } **T49**
4. Which of these dangers caused his death? } **T50**
5. Mahudu’s son John became a trade union activist. Do you think his father’s story influenced John’s decision to become an activist? Explain your answer. } **T51**

} **CS1**

Figure 7.23 Case study (CS1) coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 8. Learner’s Book, p. 155

This case study is not labelled and titled as a ‘Case Study’ like others in the textbook. However in the Classroom Activity 6.13, the instruction to learners is to “Read the

case study". It therefore forms part of the coding for case study analysis of this textbook.

This case study is built up from various sources: one appears to be a narrative set up by the textbook writer intertwined with an extract from an interview conducted by David Coplin; and an internet website describing conditions under which miners worked underground. A closer analysis of the activities in the case study also show that learners are required to use their skills as historians, although in a small way. Many of the tasks are actually generic and involve extracting information from the case study (T1, T3 and T4), but others (T2, T5) involve higher levels of cognitive ability also requiring learners to impart an empathetically charged view point. In this case this requires learners to understand both the life of Mahudu and his son and to then use the perspective of Mahudu's son to decide whether his decision to become a trade unionist was influenced by his father's experiences or his own lack of a family life. The learner interrogating this case study would need a substantive knowledge base before a perspective is formed. There is indication of the development of historical thinking and the case study was coded in the Esoteric Domain because it clearly has historical content, the language is specialised and the procedural knowledge fosters one aspect of historical thinking.

To clarify the difference in the way case studies are used, a further example coded in the Expressive Domain is presented below, with the clear objective to show the distinction between the two.

Figure 7.24 shows how case studies are coded within the Expressive Domain.

Word bank **A B C**

disguised dressed as someone else so that people don't recognise you

Leaders

The leaders of the Soweto uprising were students from the local schools. They were influenced by BC ideas. Many belonged to organisations such as the South African Students' Movement (SASM), which helped students to get from matric to university. SASM had branches at different schools. A few days before the uprising, members of SASM and other organisations met to discuss what to do about the Afrikaans issue. They formed the Soweto Students' Representative Council (SSRC), which organised and led the uprising. Tsietsi Mashinini was elected as the president of the SSRC. He was the SASM branch leader at Morris Isaacson School.

Case study: Tsietsi Mashinini

Teboho 'Tsietsi' Mashinini was born in Soweto in 1957. He was the second of 15 children. He entered Morris Isaacson High School in Soweto in 1971. He was excellent at sports and debating. He was a stylish and intelligent young man. Tsietsi Mashinini was one of the 1976 student leaders. Fifteen thousand students in Soweto protested against Bantu Education and 'the system' as the students called it.

After the June uprising in Soweto, the police tried to catch Mashinini. But he was always one step ahead of them. His comrades advised him to leave the country. A man named Reverend Legotlo drove Mashinini, disguised as a church-goer, across the border into Botswana. They then flew from Botswana to England. He later went to other countries in Africa.

Mashinini died in 1990 in Guinea before he had a chance to come home.

This photo shows Mashinini speaking at a meeting on 2 June 1976.

(Source: Adapted from Kros, C. and Segal, L. (2009). *Era of Mass Resistance 1960–1980s*. Johannesburg: Publisher. Pages 26–34.)

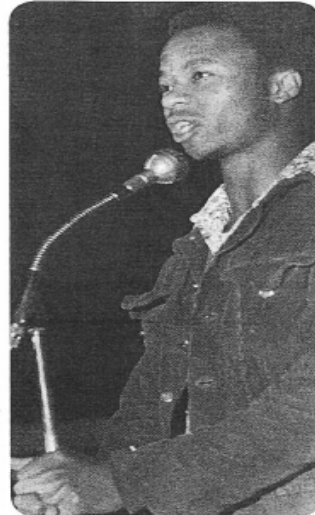


Figure 7.24 Case studies coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 9. Learner's Book, p. 215

The case study is coded in the Expressive Domain, as it has historical content, its language is specialised and there is no procedural knowledge. This case study has been adapted by the textbook authors from the book in which it was published, but the important point is that the reference is acknowledged and allows the learner to understand its historical origin and its significance for inclusion in the chapter topic, thereby scaffolding the credibility of the information. The ways in which learners are expected to interact with the case study are, however, questionable, as they are not required to complete any activity based on the case study. The case study then stands alone as an 'appendage' which learners are simply supposed to read and take note of.

The point of placing a photo of Mashinini and providing information about his role as a SASM branch leader should be to give it due importance, especially as the SASM played a key role in the lead up to the Soweto Uprising. However, the information presented in the context of this analysis shows it to be ‘substantive knowledge’, or facts on an important protagonist of a historic event in South Africa. At this stage it is perhaps important to simply acquire the important facts (substantive knowledge). But the lack of procedural knowledge development therefore does not encourage learners to work as a historian does, in terms of the definition of the Domains of practice for school history. The case study could have been brought to life with an activity involving questions on how Mashinini, as branch leader, could have influenced and persuaded his colleagues to participate in the uprising. Learners could have been asked to use the numbers of Mashinini’s contemporaries participating in the movement to evaluate his leadership.

8. Word banks

Table 7.10 shows the number of word banks in each textbook and the percentages of institutionalisation in each:

Table 7.10 Number of word banks institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	1 (20%)	1 (12,5%)	1 (12,5%)	5 (38%)	1 (8%)	0 (0%)
Expressive Domain	0 (0%)	1 (20%)	3 (37,5%)	3 (37,5%)	1 (8%)	0 (0%)	1 (8%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	0 (0%)	3 (60%)	4 (50%)	4 (50%)	7 (54%)	12 (92%)	12 (92%)
Total Word Banks coded	0 (0%)	5 (100%)	8 (100%)	8 (100%)	13 (100%)	13 (100%)	13 (100%)

Each section of textbooks starts with a ‘word bank’ containing words that the learners need to know “in order to understand the work to follow (an essential feature for learners who are not learning in their home language (Friedman, Ranby & Varga, 2013, p. xxxiii)”.

These word banks were useful in the analysis, as they contain many words which are specialised to history. Some of the words are semantically dense and require explanation so that learners, when working with the section, can understand its meaning in the context (Examples: AD, French Huguenots, stone carvers). The purpose of a word bank is to weaken the semantically dense words in the text. Thus, using the tool of institutionalisation to identify language specialisation and content of history could be done with ease. However, the challenge arose when coding the associated knowledge as either procedural or generic.

This challenge was overcome by finding the word in the text in order to determine ‘how’ it is used. If it is simply listed in a sentence without engagement in any specialised way, it is coded as generic. If it is listed in the word bank and then used in text in a disciplinary sense, then it is coded as procedural. For example ‘AD’ is listed in the Grade 6 textbook, explaining it as “anno domini (Latin); in the year of our Lord” (Ranby & Zimmerman, 2012. p. 24). Then in the knowledge segment on page 27, a timeline is presented showing changes in the Limpopo Valley before 900 AD to 1300 AD, also providing a list of events that happened along the timeline. This demonstrates to the learner that the events under study in history can be placed in sequence. The idea of time and chronology is signalled through the use of AD in text. ‘Time-and-chronology’ is presented as one of the key concepts in the CAPS social sciences (DoE, 2011b, p. 11–12) document which states that, “It is important to place events in the order in which they happened in time, and to consider their context”, because “History is studied and written in sequence”.

The results of the analysis of the word banks indicate an increase in their number per grade as they advance into higher grades. Surprisingly, there is a dramatic increase in Grade 8 and Grade 9 coding in the Public Domain because concepts are explored and exemplified in the word bank prior to the content knowledge presentation. There seems to be an increase in semantic density across the textbooks, but these concepts are general concepts and not specific to history. The kinds of words Grade 8 and Grade 9 learners are exposed to are semantically dense and explanation of them would make the English language more accessible. Perhaps there is an understanding that when the English language is accessed, then the language specific to history becomes

accessible. Although the topic is rooted in the past, the concepts considered for inclusion in the word bank are those that do not pertain to history only but also include generic words. Some words in history which need significant explanation are not engaged with, even though they do need considerable discussion for learners to understand them. For example, Word bank 10 (WB 10) contains the four words: ‘activist’, ‘confined’, ‘investors’ and ‘ungovernable’, yet deals with the heading “Internal Resistance and repression in the 1980s”. Concepts like ‘resistance’ and ‘repression’ should have appeared in the word bank. These words are also not defined elsewhere in the chapter.

The difficulty levels of the textbook are on the increase. The learner in history is expected to know more words than those that appear in the word banks. The learner has to have an extensive vocabulary to read the knowledge, assimilate it and complete the activities. The print space in the Grade 8 and 9 textbooks is much smaller and denser. Reading requires high level deconstruction skills to analyse the content. The teacher’s work also increases because apart from the increased substantive knowledge, the knowledge is far more abstractly presented in the language of higher difficulty levels. This requires increased explanation, as the factual information also becomes dense and compressed. No word bank is provided in the Grade 3 textbook, which means that new concepts would have to be explained by the teacher.

Figure 7.25 shows a word bank (WB1) coded within the Public Domain.

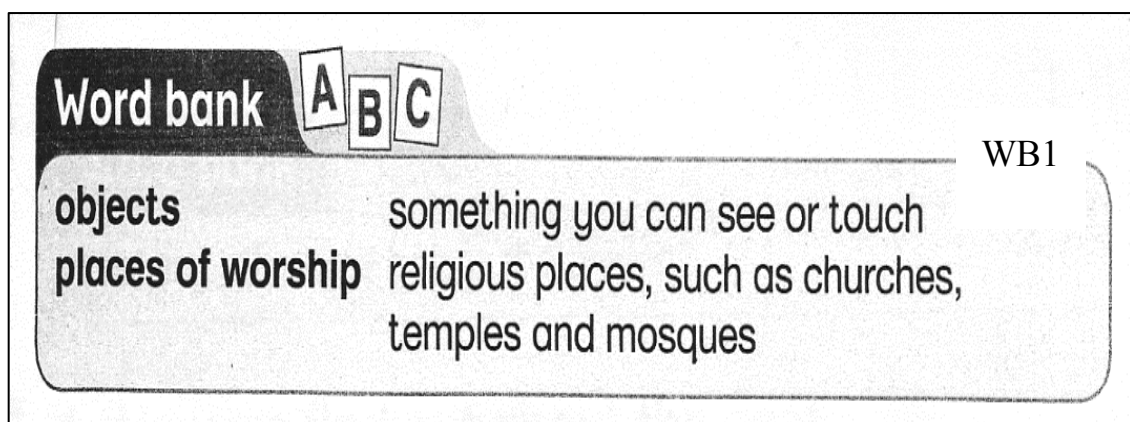


Figure 7.25 A word bank (WB1) coded within the Public Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 4. Learner’s Book, p. 25.

This word bank has been coded in the Public Domain as it presents concepts that are neither historical nor is the specialised language. These concepts are used in the text to clarify understanding of the local area. There is no specialised skill associated with the presentation of these words in the text. They aid in unpacking the semantic density of a work. It is explained to the learner that learning about our local environment is from objects, people, pictures and writing. The chapter later explains how or what we learn from them. While the meanings are highly condensed at the start of the chapter, as the chapter progresses, the semantic density weakens.

Figure 7.26 shows a word bank (WB 1) coded within the Esoteric Domain.

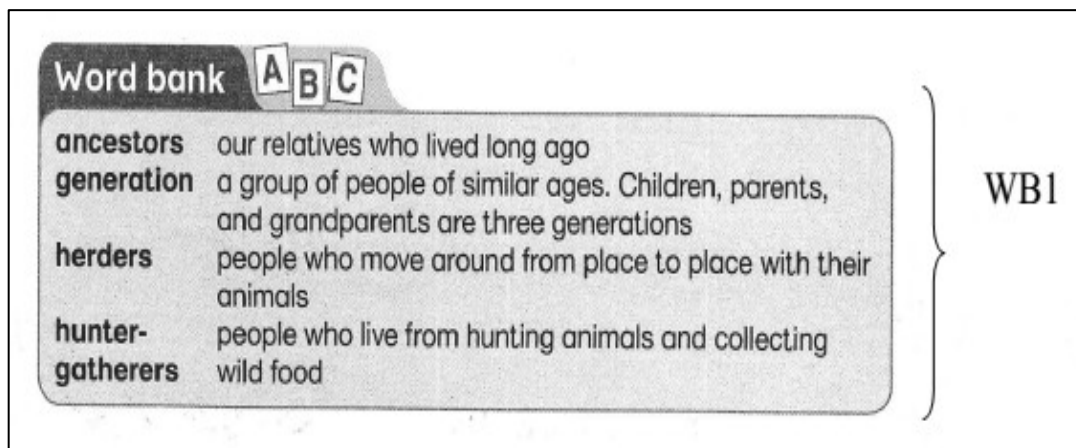


Figure 7.26 A word bank (WB 1) coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all. Grade 5. Learner’s Book*, p. 26

This word bank has been coded in the Esoteric Domain, as the concepts presented have both specialised and historical content. The language is specialised to history. These concepts are used later in the chapter to show its application so that learners can foster understanding. There are no specialised skills associated with the presentation of the concepts in the word banks themselves, but how the words are used in text ties them to a process. The words appear as dense at first, but as the chapter progresses the meaning is clarified. Here too, the learners can view the word bank in isolation, obtaining a superficial, dense meaning, unless they engage with the rest of the chapter where meanings are decoded and the context of the topic under study is understood.

The words in the word boxes are thus tied to their use in the text. The language and semiotics elaborate and contextualise the event for the learner.

Figure 7.27 shows a word bank coded within the Expressive Domain.

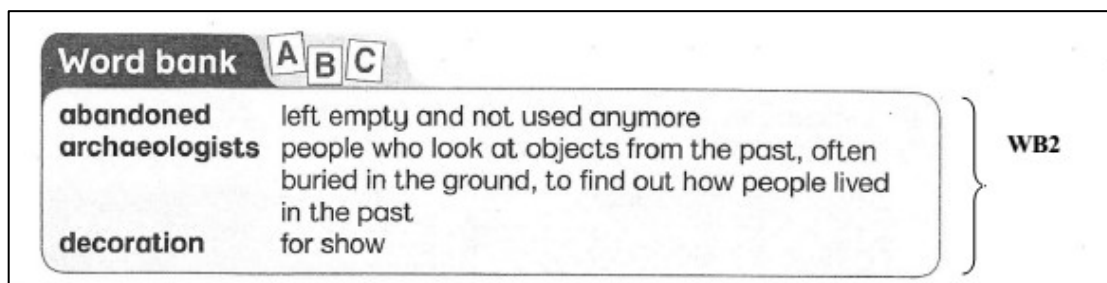


Figure 7.27 A word bank coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 6. Learner's Book, p. 26

The word bank above has been coded in the Expressive Domain because one of the words has historical content and specialised language in history, as it deals with 'archaeologists'. However, words like 'abandoned' and 'decoration' are generic content words. The value of placing them in a word bank is questionable. This is a generic act of inclusion, as there are far too many concepts that could have been placed in the word bank. For example, 'settlement' and 'ivory' are words that need explanation and scaffolding. What is a settlement? The textbook also does not explain what 'in the year of the Lord' means. (Textbooks seem to avoid this critical explanation of AD as it appears throughout the chapter.) Most Grade 6 learners would have encountered 'decoration' before, but here it is considered a word worth placing in a word bank. 'Ivory' is a fairly new concept for learners who need to know more about it than the fact that it is harvested from elephants, yet this discussion does not appear. Greater explanation has to be provided by the teacher to explain why people would travel great distances to obtain this valuable trade commodity. While the words from the boxes are used later in the chapter, they do little to harness specialised skills which are relevant to history. In fact, the word bank is a composition of some generic words which do not need explanation in the Grade 6 classroom.

9. Conclusion

In this section the key findings of this level of analysis were summarised and the implications for progression were discussed. Using the domains of practice (Bertram, 2012) as an analytic tool, various segments of information across all seven textbooks were analysed. The objective was to use these segments as a lens to view how the substantive and procedural knowledge dimensions shifted across the grades.

The study found that there is an overall growth of the substantive knowledge in the textbooks which is indicated by an increase in the number of headings, sub-headings, paragraphs, pictures and photographs, cartoons, maps, activities, and case studies. The language in which the substantive knowledge is presented also becomes semantically dense, more abstract and specialised to history. The inclusion of word banks helps weaken the semantic density, but only to a limited degree. It was found that while the word banks present some complex and dense concepts, these words are generic and sometimes not essential for inclusion. The study shows that there are other complex words which are both semantically dense and specialised to history which require more explanation.

While the growth of substantive knowledge is strongly represented, the growth rate in the procedural dimension is not consistent. The findings indicate that the information presented in the textbooks centre on reading and extraction rather than on engagement with specialised historical procedures. The strong coding of activities/tasks, paragraphs, pictures, headings and sub-headings, case studies, and maps in the Expressive Domain rather than the Esoteric Domain means that there is little engagement with specialised procedures. Although Grade 3 and Grade 5 show a stronger engagement with these procedures, this is not the overall trend. The implications for the progression are clear: There needs to be greater attention to the advancement of procedural knowledge. Movement into the Esoteric Domain would involve a conscious and determined effort to develop learner ability in disciplinary skills.

7.3 Step Two: Historical source inquiry

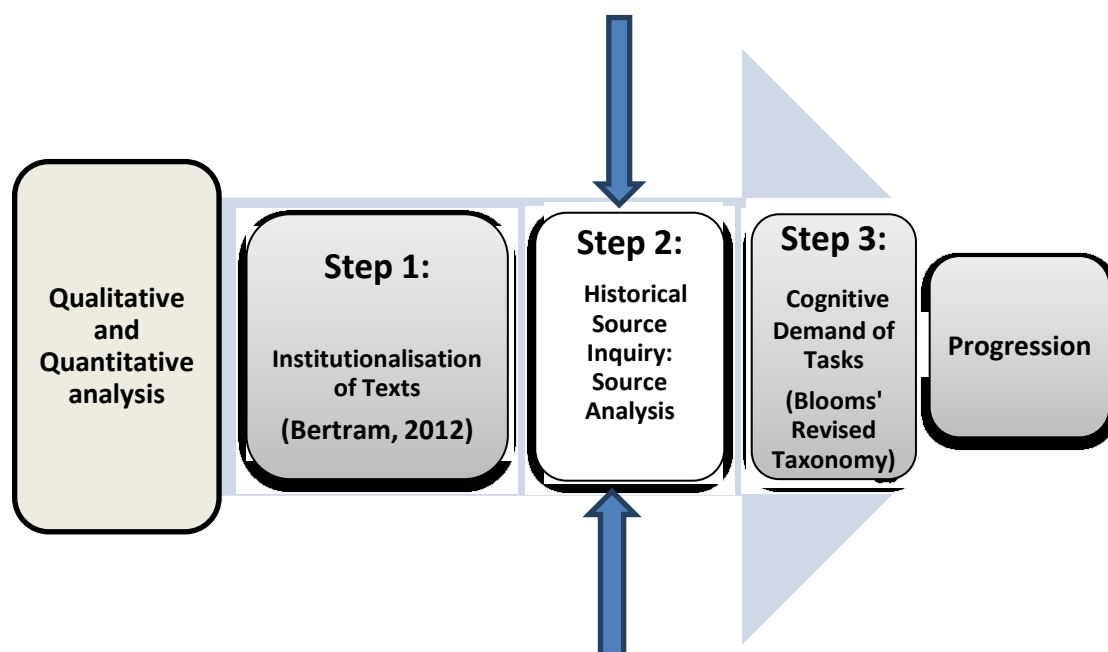


Figure 7.28 Step Two in Level Three

This step investigates how each of the sampled texts use sources in their content. It examines the skills that learners are expected to harness while engaging with the textbook activities, and explores how these skills are expected to develop historical thinking. The “Concepts in History”, as defined in the CAPS social sciences (DoE, 2011c, p. 11–12), indicates that “Historical Sources and evidence” is a key concept, and “It recognises that History is not ‘the past itself’ but rather an interpretation and explanation from various sources. Evidence is created when sources are used to answer questions about the past.”

This means a focus on reading and engaging with primary historical sources, identifying potential bias, questioning the credibility of the author, establishing and understanding the purpose and audience, and formulating different interpretations of the same event. This step of the analysis should be read alongside the earlier section on the ‘institutionalisation’ of pictures. Discussion there was on the types of pictures and photographs that were not labelled as a ‘source’, but which were used in

specialised or generic ways. In this section, discussion is focused only on those segments that are labelled as a 'source' and engages with how these sources are used by learners on the basis of the activities and tasks attached to them. It then focuses on segments of knowledge which are used as 'general sources of information' to show how they are different. This section also clarifies how the lack of provenance can challenge the learner when faced with 'evidence', or what is counted as evidence, in the text. Examples are provided to illustrate how procedural knowledge could be threatened if provenance is incomplete. 'Sources' that lack pertinent information are incomplete, as they need to be appropriately contextualised so that learners can present a perspective on their origin, the constructor and the purpose for which it was constructed.

7.3.1 Links with theory

Bertram (2014) links the doing of history to Lévesque's notion of Disciplinary-History. Historical inquiry is a process by which an understanding of the past can be fostered in the learner. Historical inquiry is a cyclical process that involves asking historical questions about evidence from the past. Investigating and analysing the artefacts of the past results in the construction of a reliable narrative or story. These artefacts constitute the evidence or contemporary proof of a time, event or idea. Both primary and secondary historical sources are products from different times, people and spaces (contexts) which enable the construction of historical knowledge. "They are 'artefacts' left by the past, existing in relics or 'remains' or as testimonies of witness to the past" (Howell & Prevenier, 2001, p. 17).

In the previous section, I defined the types of sources as primary, secondary and tertiary. Among these different types, there are examples of sources, which can be interview extracts, poems, letters, journal entries, autobiographies or biographies. As learners work with the different types of sources, and acquire specialised skills in the 'techniques' or 'methods' of the discipline, they 'do' history as historians do. Historians have developed specific techniques for source interrogation and analysis, such as gauging its authenticity, decoding and interpreting it. If the sources in the textbooks actually foster this understanding in users of the text, then they are imparting the methodology of the historian to the learner. While textbooks present tasks for learners to interrogate, they do not explicitly teach what a source is. They

label an item or case study as a ‘source’ but none of the textbooks in the sample provide descriptions of the types of sources or their nature. Neither do they explicitly teach or define ‘credibility’ or ‘reliability’ of sources. They also do not describe how learners should interrogate them. In the activities attached to a source, there is clear engagement with it on issues of reliability and credibility, but there is an absence of how this is done. It appears that it would become the teacher’s responsibility to teach skills of enquiry.

It is equally important to note whether these sources are actually primary sources and not ‘pseudo’ sources, photographs or pictures being used as a means to elicit historical thinking. Perhaps, due to the passage of time, there are no primary sources that can be traced to the event under discussion. Such a scenario then compels authors and writers of texts to ‘create’ pictures or drawings that look like they were ‘manufactured’ or ‘written’ during the time period under study, in order to contextualise the era or make it ‘real’ for the learner. This type of visualisation serves to provide images that are related to history, bringing the past to the classroom. However, textbooks need to be candid and explicit that these pictures are not historical sources. An example is provided in the previous section, where a family living room can be examined for sources of information that could tell us more about the family’s life-style and interests. This is in a Grade 4 textbook and was coded in the Public Domain. There is no purposive teaching or explanation of a historical source.

There is a definite purpose to using secondary sources in history textbooks, provided they support the idea of sustained growth in historical thinking. However, the inclusion of ‘primary sources’, in the definition provided by Seixas (2006), places a restriction on the type of source and affects any type of judgement or the position the learner discussion might take. Drawing from Seixas (2006), Morgan (2010, p. 303–304), contends that the three outcomes of the Benchmark Project to supplement the South African curriculum are: using primary source evidence for historical arguments, taking a historical perspective, and understanding the moral dimensions of historical interpretations. She equates this to a ‘disciplinary literacy’ which, in history, includes “the ability to evaluate materials and information in relation to their context and their source and to integrate this and other information into written historical discourse”

(Paxton, 1999, p. 323 as cited by Morgan, 2010). Likewise, Waller (2009, p. 8) purports that historical literacy is functional in terms of sourcing, contextualising and corroborating information so as to understand an event rather than only know it. Wineburg (2001) argues that historical literacy is divided into these three heuristic domains: Sourcing refers to the evaluation of sources and other historical documents, requiring learners to evaluate and interrogate the origin, reliability and value of the sources while understanding their purpose; ‘Corroboration’ requires learners to review, cross-check and examine facts within the sources with other historical sources and documents and so develop multi-perspectives; On the other hand, contextualisation locates the events in a larger context by dating the event and indicating who produced the source and for what reason. These are important details to detect bias and reliability of sources that would result in reliable narratives. Collectively, the process is referred to as the ‘provenance of sources’ (*ibid*).

Amidst what is regarded as ‘fact’ and presented in the content of the textbook, are a variety of ‘sources’ which are pieces of ‘evidence’ that learners must weigh up against each other and piece together to produce the closest account. This is done so as to keep within the discipline’s aim of analysing the context.

7.3.2 The method

Encapsulated in the Recording Sheets for the Use of Sources in Appendix B, is the ‘disciplinary’ idea of history being ‘done’ as historians ‘do’ and which leads to the development of historical thinking in the learner. The purpose of this tool is to indicate how many sources are included in the text and to indicate the example of the source used in the textbook. The sources and the related activities are the unit of analysis. The sources are investigated to establish their ‘institutionalisation’ and how each involves historical skills, such as sourcing, corroboration and contextualisation. The cognitive demand of the sources in the task content are dealt with in the third and final step of data generation.

For the purpose of order, there had to be a way to categorise information in textbooks to separate that which is labelled as a ‘source’ and that which is not. Those pictures that have been used as a ‘generic source of information’ to mimic historical inquiry or are designed to ‘pose’ as a source (decorative purpose) have been dealt with in Step

Two of the analysis (maps, pictures, drawings, cartoons, paintings). Even though a cartoon may have been a primary source, it is not included in this section because it has not been labelled by that textbook as a ‘source’. The same textbook labels other information segments as a ‘source’. There is no way of establishing why the writers chose to do this, but a way had to be found to code what a textbook regards as a ‘source’. This analysis of sources is therefore restricted to those segments labelled as a ‘source’ in the textbooks. Therefore, Step Two deals strictly with sourcing, corroboration and contextualisation and how they are institutionalised. Mention is later made of examples of sources that have incomplete information.

7.3.2.1 Number of sources

Table 7.11 shows the number of sources in each textbook and the number and percentages according to the institutionalisation analysis:

Table 7.11 Number of sources institutionalised in each textbook

	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
Esoteric Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (20%)	2 (9%)	13 (72%)
Expressive Domain	0 (0%)	0 (0%)	0 (0%)	1 (100%)	4 (80%)	15 (68%)	5 (28%)
Descriptive Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Public Domain	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	5 (23%)	0 (0%)
Total Number of Sources	0 (0%)	0 (0%)	0 (0%)	1 (100%)	5 (100%)	22 (100%)	18 (100%)

Table 7.11 shows how information in textbooks are only acknowledged and labelled as a source later in the grades. The word ‘source’ is first used in the Grade 6 textbook. This does not imply that there is no material in earlier texts that assists in the understanding of how information from the past can be known. There are various ways in which these ideas are brought to the learner in the textbooks, but they are not labelled as sources. They serve their role as a ‘generic source of information’, which is different from a historical source (primary and secondary sources).

In Grade 6 there is only one segment of information that is identified as a source in the chapter, and its location in the Expressive Domain indicates that while the language and content is historical, the source is being utilised in very generic ways. There is an increase in the number of sources in the higher grades, but where 68% of the Grade 8 sources are also located in the Expressive Domain, showing that they are not being used to develop specialised procedural knowledge. Perhaps this is because the sources under study are engaged with in generic ways. Another reason for a weaker coding of procedural knowledge in Grade 8 could be attributed to the lack of sufficient information provided with the source (provenance). Provenance issues are real challenges for both teachers and learners, as the origin and credibility of the source restricts high level and historical questioning on the source. The percentage obtained in Grade 8 increases in Grade 9, where 72% of sources are coded in the Esoteric Domain. This implies ‘progression’ towards a greater interrogation of procedural knowledge.

Figure 7.29 shows the Grade 6 source coded within the Expressive Domain.

S1



Figure 7.29 A source coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 6. Learner’s Book, p. 24

The only source provided in the Grade 6 textbook (S1) was coded into the Expressive Domain because the content is clearly historical, the language is specialised to history, but, most importantly, it is used as an ‘appendage’ or ‘ornament’ in the text. Learners are not required to engage with it at any level apart from the obvious reading which is expected with any of the information in a textbook. It provides the learner with important information on the years in which African people lived in the Limpopo Valley and how the first complex society came into existence with the first king, stone palace, city and state.

It is interesting to note, however, that in spite of being labelled as a ‘source’, it obtains information from a secondary source, a book entitled *Mapungubwe-ancient African civilisation on the Limpopo*, authored by T. N. Huffman, and published in 2001. The appearance of the text is misleading, as its appearance is like some weathered primary source (the edges of the paper are frayed with age or somehow burnt), providing details on the earliest African society in southern Africa. Such techniques are probably creative avenues employed by the author to scaffold the idea of history, age and the notion that it could be an original document (primary source). However, despite its appearance of ‘originality’, it is a secondary source.

The general observation of the material presented in these textbooks is that they lack provenance. Pictures, drawings and written information that come from other sources are not appropriately referenced so that learners can identify their origin, who created the information or who took the picture. These details should support any piece of evidence in order to qualify it as a reliable piece of evidence. The CAPS social science (DoE, 2011c, p. 11–12) document focuses on interpretation and explanation from various sources. It further argues that evidence is created when sources are used to answer questions about the past.

Figure 7.30 shows a drawing used as a source (S2), coded within the Expressive Domain.

up the children of the house.

- Slave children did some work on the farms such as tying bundles of a crop. They also helped look after younger white children.

Classroom activity 6.5


Work with a partner.

Look at the picture of the slave working in the field in **Source B**. Tell your partner what you notice about the picture.

S2

T17

Source B *under these trees.*



This picture shows a slave working in the field. He is watched by a farmer or a company official.

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Figure 7.30 A drawing used as a source (S2) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, p. 129

This picture has been coded in the Expressive Domain because it has historical content in appearance and substantive knowledge content in its caption, while the procedures learners engage with are generic. The 'slave-master' concept emanating from the caption of the picture points to its substantive historical content. The learner is asked to tell their partner what they notice about the picture. This is general extraction of information from observation. The content may therefore be historical, but the procedural knowledge is generic. The drawing is used as a source and is labelled as a such, but special information is not provided about why it is classified as a source, while other pictures on the page are not. The drawing is undated and not appropriately contextualised, thus, we do not know if it is a primary source. The artist is unknown and the reasons for the production of the picture are unknown. Sources in history require some procedural knowledge that ought to be developed from engagement. However, this is not the case here.

Figure 7.31 shows a journal extract (Source 1) coded within the Esoteric Domain.

Source A

Jan van Riebeeck wrote a journal about life at the Dutch settlement. In this extract from his journal, he writes about a meeting with the Khoikhoi leaders about the land.

They said, 'If you get many cattle, you come and take over our pasture with them, and then say the land is not wide enough for us both! What is more fair – for the natural owner of the land to leave, or the foreign invader?' They insisted on this point, but we told them that they had lost the land in war, so they could not expect to get it back. We were going to keep it.

(Source: Adapted from: *The Sahara is the biggest desert in the world. Africa One Continent Many Worlds.* California Academy of Sciences. Available from: <http://www.calacademy.org/exhibits/africa/exhibit/sahara/>.)

S1

Classroom activity 6.3

Work with a partner and read **Source A**. Look up any words you do not understand in the dictionary. When you understand the source well, answer these questions.

1. Who wrote this source? } **T14**
2. What point were the Khoikhoi leaders making? Use your own words. } **T15**
3. Van Riebeeck tells the Khoikhoi leaders that they have lost the land in war so they will not get it back. Do you think this is fair? (In your answer, you can also think about how the Khoikhoi got the land.) } **T16**

• Topic 6 Colonisation of the Cape 17th–18th centuries

Figure 7.31 A journal extract (Source 1) coded within the Esoteric Domain

Retrieved from *Social Sciences. Solutions for all.* Grade 7. Learner’s Book, p. 125

The source or the extract from the journal of Jan van Riebeeck has been coded in the Esoteric Domain because the learner is asked to identify the writer of the source, to interpret the agenda of the Khoikhoi and to judge the fairness of the claim made by Jan van Riebeeck that the land belonged to the Dutch by virtue of their victory in the war. The content is historical, the language specialised and the specialised procedural knowledge fosters historical thinking. The textbook, however, acknowledges the references for the source as follows:

(Source: Adapted from: *The Sahara is the biggest desert in the world. Africa One Continent Many Worlds.* California Academy of Sciences. Available from: <http://www.calacademy.org/exhibits/africa/exhibit/sahara/>.)

There should be a date of publication, which would give learners insight into the construction of the source and, hence, the story of how and why the source came into

the hands of the author. There is insufficient contextualisation of the source. Proper contextualisation would require information about the primary source; not only of the secondary source, for example, the date when van Riebeeck wrote the journal and in response to what.

Figure 7.32 shows how an extract (Source 5) was coded within the Expressive Domain.


Source E

In this extract, a modern historian describes how difficult it was for the trekboers to travel.

S5 Travelling by ox wagon was slow, uncomfortable and tiring for the driver and passengers. Travellers averaged only six hours a day because it was difficult to cross rivers, the roads were rough, and they had to stop often.

All the passes over the mountains were very difficult to use. They could damage the wagons badly, breaking their wheels against the rocks or sinking them into the sand. The narrow pass was made worse by thick plants. On many occasions, travellers would have to unpack and take apart their wagons and then carry their goods and food through the kloof.

(Source: Adapted from Giliomee, H. and Mbenga, B. (2007). *New History of South Africa*. Cape Town: Tafelberg. Page 66.)



S4

These pictures show what some parts of life were like for trekboers

Classroom activity 6.12

Work with a partner and answer these questions.

1. Look at the pictures in **Source D**. Discuss everything you see in each picture. } **T37**
2. Read **Source E**. Make sure you understand all the words and what the source is about. Write a point-form summary of the source in your own words. } **T38**

Figure 7.32 An extract (Source 5) coded within the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, p. 140

This source (S5) has been coded in the Expressive Domain because the content knowledge is clearly historical, the language is specialised, but the procedural knowledge is generic because the learner simply has to write a point form summary. Précis writing involves general skills which are not specialised to history. The source is also a secondary source and not a primary source.

The source above could be used far more creatively to involve the learner in historical understanding and thinking. For example, learners could be asked to write a diary

entry for a settler, describing the conditions under which they lived as they trekked, as well as a description of the hardships they faced on the way. The activity could be extended by asking learners to cite the reasons for their unhappiness and dissatisfaction with their previous abodes. A point form summary hardly engages the learner in historical understanding of the conditions of the trekkers. Although the source is actually attempting to convey this, the learner would understand it better if it was personalised. The development or the appreciation for the time and empathy would be more scaffolded if the source was used in this way. The target for learning in history is to engage learners with tasks that are in the Esoteric Domain. In this domain, not only are the conditions for knowledge to be historical and language to be specialised critical factors, but the procedures involved in the activity have to be specialised as well. Only under these conditions will historical thinking prevail (Bertram, 2012).

Sources in textbooks can create the ambiance of the past, in the sense of contextualising events for the learner. Certain sources show what the past looked like by recreating visual images for the learner. Some sources can be compared so that different interpretations of the same past can be formed. Learners may not ever get the opportunity to view a real manuscript from the past. Therefore, a textbook can reproduce what looks like an original manuscript in image. However, when these images are labelled as a source they create the impression that they are the original. Textbook methods of explaining the nature of their sources is what comes under the spotlight.

How images and sources are captioned are important to the reader. If a source is primary, the caption should indicate this. Even if sources are not primary, the information concerning its construction are important details that pave the way to understanding: These are time of construction, author or artist, and what historical significance it holds for its inclusion in the textbook. Where it is not the original manuscript, but a drawing or image replication from an alternative source, the caption should notify the learner that this is the case. Captioning a secondary source allows learners to delve into the reasons why the primary source was not used. The difficulty of writers to obtain photographs of real manuscripts is possibly the reason why


sketches or drawings are used. Of course, capturing information from earlier ages such as the 16th and 17th centuries is made complex, as there were not advanced methods for recording then as there are today. However, that it is not an excuse for writers not to clarify this. Interestingly in the Grade 8 textbook below, all photographs labelled as sources are coded in the Public Domain. At this level, they are sources which are used in a very generic way.

Figure 7.33 shows photographs labelled as sources in a textbook coded in the Public Domain.

Source A

This golden rhino was found at Mapungubwe, an ancient civilisation in southern Africa. It is kept at the University of Pretoria.

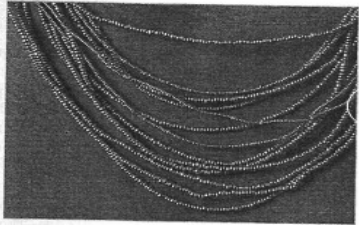
S6



Source B

This image shows golden jewellery.


S7



Source C

This is a gold coin.


S8



Source D

This man has a gold tooth.

S9



Classroom activity 6.7

Look at sources A, B, C and D on this page. Work in a group and talk about the picture in each source.

1. Describe each thing and how gold is used in it. } T30
2. Is the gold used for something practical or does the gold represent wealth in each source? } T31
Explain your answer.

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Figure 7.33 Photographs labelled as sources in a textbook coded in the Public Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 8. Learner's Book, p. 149.

The photographs labelled as sources here are simply images that the learners are expected to talk about. They are required to describe the objects in the photo and explain whether the gold is used for something practical or to represent wealth. These activities are generic and are not specialised to history. The task is far too simple for learners in Grade 8. The coding for sources B, C and D are thus in the Public Domain because the content is not specialised to history; they are located in the everyday, the language is not specialised and the procedures engaged with are generic. Source A (the photo of the rhino of Mapungubwe) does have historical content and the language of the caption is historical, but the related activity is generic. Therefore, its coding is within the Expressive Domain.

Figure 7.34 shows sources coded in the Expressive Domain.

Source M

S18 This source was written by a modern historian. It describes early Johannesburg:
Almost overnight Johannesburg turned from a mining camp into one of the most dynamic cities in the world. In the early 1890s the mining industry was employing more than 100 000 men. Johannesburg had a white population of 50 000, only 6 000 of them Afrikaners. The great majority of the rest were British. The gold mines drew greedy moneymen, schemers and criminals along with miners, white and black. In the city there were nearly 300 bars, many with back rooms for commercial sex. The streets were filled with diggers, prostitutes, gamblers, saloonkeepers, washerwomen and domestic servants. The Afrikaner poor were migrating in a steady stream to the cities to take up jobs as brick makers, cab drivers and transport riders.

(Source: Adapted from Giliomee, H. and Mbenga, B. (2007). *New History of South Africa*. Cape Town: Tafelberg. Page 200.)

Source N

S19 This photo shows the early surface diggings in the area that became Johannesburg. The mines soon had to become deeper because the gold was deep underground.



Source O


This is a postcard from 1888. It shows Johannesburg from Doornfontein, which is in the middle of the city today. There are still no roads, and the buildings are small.



S20

Source P


This is a photo of miners in a compound. They are playing a traditional game.



S21

Source Q

This photo shows the market and post office in early Johannesburg.



Market Square and Post Office

Photo P. Published by J. Barnett & Co. No. 289

S22

Classroom activity 6.18

Work with a partner for this activity. Then share your ideas in class.

1. Look at sources L–Q. Each one tells you something about the growth of the city of Johannesburg. Talk about what you understand or see in each source.
2. Copy the table below into your exercise book and fill it in.

T65

Source	Describe the source briefly.	What does it tell you about the city of Johannesburg?
L		
M		
N		
O		
P		
Q		

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Figure 7.34 Sources coded in the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 8. Learner's Book, pp. 160–161

This is very clearly demonstrated in the given example: Sources M–Q where the learner is directed to describe the source and then write what the source says about the city of Johannesburg. In reality, this source does not tell the learner about the city of Johannesburg directly, but the text addition in the information box which assists the

learner does. Perhaps the intention of the activity is to guide the learner on how pictures and photographs can be used as sources to describe changes to the city of Johannesburg over time, but then the textbook should clarify this. Furthermore, if change is being analysed, then current photos of Johannesburg need to be included to focus more explicitly on the historical thinking concept of change and continuity.

The textbook has already done the activity for the learner, and then it requests the learner to do it. It therefore requires the learner to read and extract the information. The activity is then a generic one, which means that each source is coded in the Expressive Domain rather than in the Esoteric Domain. Also, the learners are not required to establish the authenticity of the photograph. They are thus not engaging in procedural knowledge, but are shown how to engage in image analysis. This is also not done in an overt manner, but takes on the ‘appearance’ of engaging in historical skills. Any onlooker who is not familiar with source engagement at an in-depth level will not be able to ascertain this. A trained historian and researcher will be able to analyse the sources and how they are being used. Therefore, it is easy to conclude that this particular chapter in the Grade 8 textbook has a large number of sources, but how these are being used suggests that they do not foster historical thinking. Their placement in the Expressive Domain and not the Esoteric Domain indicates this rather explicitly.

7.3.2.1.1 Incomplete information in sources (Incomplete provenance)

Often in a text, there are sources which are presented but with incomplete information with respect to the way it is contextualised. This refers to incomplete provenance. There are insufficient details indicating when and who constructed the source (whatever its form). As highlighted earlier, these are important details when establishing the credibility of a source. We utilise the information within the source as evidence towards the construction of history. The discussion below on the incomplete information in sources presents an example of why an incomplete source challenges the production of procedural knowledge.

Figure 7.35 is made up of six parts to contextualise the coding of Source C, with incomplete information, coded in the Expressive Domain.

were trying to get away. Three policemen were hurt by stones thrown at them.

Source C

This photo was taken as the police fired on the crowds.



Classroom activity 8.5

Work in a small group. Study Sources C–G. Copy and fill in this table:

	Source C	Source D	Source E	Source F	Source G
What does it tell you about the mood of the crowd?					
What does it tell you about the reasons the police started shooting?					
What does it tell you about whether the crowd was armed?					
Is this source reliable? Give reasons.					

Source D

Tom Petrus was in the crowd at Sharpeville. He wrote a book about his life called *My Life Struggle*. This is an extract from the book:

The aeroplanes were flying high and low. The people were throwing their hats to the aeroplanes. They thought the aeroplanes were playing with them. They didn't realise that death was near ... Fortunately for me, they (the police) could not shoot on the side where I was standing. That was how I managed to get away.

People were running in all directions ... some couldn't believe that people had been shot, they thought they had heard firecrackers. Only when they saw the blood and dead people, did they see that the police meant business.

(Source: Petrus, T. (1984). *My Life Struggle*. Johannesburg: Publisher. Page 29.)

Source E

Humphrey Tyler was the assistant editor at *Drum* magazine. He went to Sharpeville to cover the events. This is an extract from his description of what happened:

The people were grinning, cheerful, and nobody seemed to be afraid. There were crowds in the streets as we approached the police station. There were plenty of police, too, wearing more guns and ammunition than uniforms. An African approached and said he was the local Pan-Africanist leader. He told us his organisation was against violence and that the crowd was there for a peaceful demonstration. The crowd seemed perfectly friendly. It certainly never crossed our minds that they would attack us or anybody.

Then the shooting started. We heard the chatter of a machine gun, then another, then another. There were hundreds of women, some of them laughing. They must have thought the police were firing blanks. One woman was hit about ten yards from our car. Her companion, a young man, went back when she fell. He thought she had stumbled. Then he turned her over and saw that her chest had been shot away. He looked at the blood on his hand and said: 'My God, she's gone!' Hundreds of kids were running, too.

Before the shooting, I heard no warning to the crowd to disperse. There was no warning volley. When the shooting started it did not stop until there was no living thing in the huge compound in front of the police station. The police have claimed they were in desperate danger because the crowd was stoning them. Yet only three policemen were reported to have been hit by stones – and more than 200 Africans were shot down. The police also have said that the crowd was armed with 'ferocious weapons', which littered the compound after they fled.

I saw no weapons, although I looked very carefully, and afterwards studied the photographs of the death scene. While I was there I saw only shoes, hats and a few bicycles left among the bodies. The crowd gave me no reason to feel scared, though I moved among them without any distinguishing mark to protect me, quite obvious with my white skin. I think the police were scared though, and I think the crowd knew it.

(Source: Adapted from Reader's Digest (1988). *The Illustrated History of South Africa – The Real Story*. Cape Town: Reader's Digest. Page 403.)

Source F

Ian Berry was photographer for *Drum* magazine. He was at Sharpeville with Humphrey Tyler:

When we got to Sharpeville, spotter planes were circling overhead and about fifteen cars were waiting on the outskirts of the township. The police drove past in armoured vehicles, which were not common at the time, and the press followed, but we were twice stopped and threatened that we would be arrested, as 'Europeans', for being in the township illegally.

I got out to see what was happening. Not much, it seemed; my guess was that there were two to three thousand there, but they were spread over a large area and with people no more than three or four deep at the fence, it didn't seem an enormous crowd. The demonstrators I talked to showed no hostility. I went back to the car. Suddenly there was shouting from the crowd.



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I turned and started to walk back towards the compound. The cops were now standing on top of their armoured cars waving sten guns, and when I was fifty yards away from the compound they opened fire into the crowd. I can't say for sure that nobody threw a stone at the police, but I do not believe a threatening situation had built up in the time it took me to walk the two sides of the compound and back. The cops were in no danger. I can only assume that they came out with the intention of showing the crowd, and in the process, black South Africa, a dreadful lesson.

(Source: Adapted from: South African History Online. Available from: <http://www.sahistory.org.za/eyewitness-accounts-sharpeville-massacre-1960>. Last accessed 29 June 2012.)



Source G

This photo shows the scene after the Sharpeville massacre.

Figure 7.35 Source C with incomplete information coded in the Expressive Domain

Retrieved from *Social Sciences. Solutions for all*. Grade 9. Learner's Book, pp. 207–209.

Source C cannot be presented alone because it is part of an activity involving four other sources as well. Sources D, E, F and G are placed alongside so as to exemplify the coding of Source C. Although they form part of the Figure 7.35, only the coding of Source C is shown and described here.

Source C above is a photo taken of the crowd at Sharpeville where police fired on and killed 69 people at what was supposed to be a peaceful demonstration. The learner is required to study the picture and then describe the mood of the people, the reasons for the police shooting, and to indicate, from observation of the photo, whether the crowd was armed. They are then to determine, with reasons, whether the source is reliable.

The provenance of the source is not explicit. It is not clarified by the textbook who took the picture and why they were in the position to have a camera to photograph such a dangerous event when everybody else is seen running away from the scene. The identity of the photographer is fundamental to the understanding of the authenticity of the photo. If it was a photographer for a newspaper, then the name of the newspaper should have appeared. The caption reads that ‘This picture was taken as the police fired on crowds’ It is questionable why the photographer did not choose to run like the rest of the crowd if the situation was precarious. If the identity was known then the motive for the photograph could be established and argument about its reliability could be cleared.

Furthermore, the photographer would also have been in a position to give detailed descriptions of what transpired and able to clarify whether the crowd, indeed, was armed. Although the photographer was an eyewitness, his or her story is not included in the textbook. The lack of detail around the photo itself could result in the final question “Is this source reliable? Give reasons” not being answered fully. Perhaps the objective of the textbook author was to purposefully leave out the provenance so that the lack of details would render the source unreliable.

The source is therefore coded in the Expressive Domain. While it has historical content, the skills of a historian in establishing the authenticity of the source cannot be developed. What seems to be an activity leading to the development of the skills of

the historian, by questioning the credibility of the source, is compromised with the lack of appropriate detail on certain sources. The other sources, however, contain sufficient details about their origin and so assist the learner in ascertaining their reliability.

7.3.3 Findings and discussion

There are greater numbers of references to primary sources in the higher grade textbooks. It was difficult to establish in the lower grades whether the sources are actually primary or secondary because the textbooks made no distinction and they all seemed to be secondary. The findings show that sources which are labelled as such are mostly used in the higher graded textbooks. This is perhaps because learners are more mature and have reached the appropriate level where they are able to ask pertinent questions and discern the reliability of sources. The learner using the textbooks in the lower grades does not engage with the word 'source', as young historians ought to do. This kind of interaction is only enabled later in their schooling careers. However, working with sources should be introduced earlier so that learners can establish routines with them and they later become easier to interrogate.

The shift in the number of sources is profound in Grade 8 and Grade 9. While there are more instances of coding in the Expressive Domain in Grade 8, there is an equal increase in the coding of the Esoteric Domain in Grade 9, showing an increase in how learners use source material to develop understanding in history. The 72% of the sources coded in the Esoteric Domain is a step in the right direction, as it indicates that both the content of the source is historical and the language is specialised to history. It also means that the procedures are increasingly procedural. There are instances where learners are requested to interrogate different sources with the intention of establishing their credibility. However, this kind of analysis could have started earlier in the grade continuum. The absence of source material such as these in the lower grades disadvantages this kind of analysis and interpretation.

Textbooks themselves are tertiary sources, as they synthesize secondary accounts. There was a complexity and challenge in analysing the sources and classifying them in the textbooks. The textbooks in the selected range have no clear system to differentiate between a primary or secondary source. There are a great number of

pictures and other information which are labelled under the umbrella term ‘source’. Some texts have provided details about where the source is retrieved from, but others simply do not. The higher grade textbooks (Grade 8 and 9) provide information about where the source was obtained. However, there is a general lack of provenance in the Grade 3, 4, 5, 6 and 7 textbooks. Where there are details in the Grade 6 textbook, provenance is incomplete. There were probably other sources from which information was obtained, but the textbook did not label it as a ‘source’. For this reason, Table 7.11 shows 0% of such sources which could be identified in the textbooks. This raises questions on how sources in history are classified. A general understanding of a source in history is different from what constitutes a ‘generic source of information’. See Figure 7.36 below for an example of a ‘generic source of information’.

Slave children did some work on the farms such as tying bundles of a crop. They also helped look after younger white children.

Classroom activity 6.5


Work with a partner.

Look at the picture of the slave working in the field in **Source B**. Tell your partner what you notice about the picture.

S2

T17

Source B *under these trees.*



This picture shows a slave working in the field. He is watched by a farmer or a company official.

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Figure 7.36 An example of a ‘generic source of information’

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner’s Book, p. 129

This example is raised here again to specifically draw attention to a general practice in some of the textbooks that recreate materials to suit a theme and which masquerade as sources from the past. In Figure 7.36 the drawing is labelled as a ‘source’, but there is no information regarding the kind of production it is, who drew the picture, when and why. Is it drawn by the textbook illustrator or is it really a primary source? These are all relevant disciplinary questions to ask to verify the authenticity of the source. If it is a primary source, then why is there insufficient information that would provide clarity to the learner? It would be acceptable for an illustrator to draw the slave and the

official from the past so as to provide learners with a visual of the past. It can be necessary for a picture to be included to break the monotony of the text and to allow the learner access to a context alien to the present one. For instance, what a slave would have looked like as he worked and what an official would be wearing at the time when he supervised the slave, would be important visuals to incorporate in a textbook; but this drawing is labelled as a 'source' and so, one can also ask what makes it a source. It, therefore, constitutes what is a 'generic source of information' rather than a source from history itself. This drawing merely creates the idea that it is a source from the actual history of slavery.

According to Koeller (2005), primary sources are those that are created in the time of the event, or close to it, while secondary sources are created a great deal of time away from the event or issue it describes. Their classification does not change the fact that they all provide some kind of information from which learners can learn. They can appear as a document, interview transcript, photograph, painting, book, journal entry or some other format in the textbooks. Classification of primary or secondary sources can be subjective and change depending on circumstances and new evidence (*ibid.*). Therefore, the establishment of the provenance of a source, the details regarding its original context of creation, the evidence around the reasons for its production such as who produced it and for what purpose and with what intention, remains the fundamental skill of the historian.

In this study, however, the lower grade textbooks present many pictures and drawings which are secondary sources of information. Primary sources are minimal. Perhaps this can be attributed to the fact that younger learners are not required to interrogate and analyse sources for purposes of establishing credibility or reliability. This means that they are not required to interpret events or perspectives and are only required to engage with tasks that are of a more generic nature. The manner in which the content of the grades is structured indicates that younger learners complete comprehension tasks on the images and text in the textbook. The striking feature about the analysis is the minimal number of primary sources that are available for the seven grades to interrogate. Interrogation in the lower grades is absent, with many examples paying little attention to the definition of a source or how powerful a source can be to

construct stories. This is raised very simply in Grade 4, but in higher grades, particularly Grade 6 and Grade 7, many are actually ‘generic sources of information’. The increase of sources in the higher grades includes an increase in the use of photographs, which are a modern, effective way of presenting and capturing more recent events in history. However, there is one factor that stands out in the use of photographs as a source: they are often presented with incomplete details.

Whilst present age technology indicates an increased use of ‘Photoshop’, which is a computer programme to edit and enhance qualities and objects in photos, there is a commensurate increase in fraudulent and reworked pictures. The construction of stories allows for a multitude of opinions and views to be presented and the ‘correct’ one is based on evidence. Therefore, the contextualisation and clarification of the reliability of the sources constitutes ‘evidence’ in the construction of a true story. The lack of referencing and appropriate provenance and correct acknowledgment of sources results in learners being unable to understand how evidence is constructed. Learners are taught referencing styles in their history projects and assignments and textbooks also need to follow academic standards. This is especially true for those listed on the Department Catalogue, as they are exposing learners to academic content and tradition. Historical thinking manifests if there is a continued and concerted study of evidence built up over a period of time.

According to the webpage (no date) of the Hood Museum of Art, Dartmouth College, which has been collecting historical objects since 1772, a high professional and moral responsibility guides their selections. They attribute the complexity of an accurate account to the provenance of sources. Details may vary from their time of manufacture to the present due to imprecise record keeping, inconsistent attributions and the lack of distinguishing marks and inscriptions which contribute to a complete provenance of sources. They argue that it is surprisingly rare to find a work of art without some gaps and ambiguities (*ibid.*). They present the following information in Figure 7.37 which exemplifies a “Complete Provenance of Information” for an artwork:

Pablo Picasso, Spanish, 1881-1973, in Paris after 1904.

Guitar on a Table

1912

Oil, sand, and charcoal on canvas

21 1/8 x 24 1/4 in (51.1 x 61,6 cm)

Gift of Nelson A. Rockefeller, Class of 1930; P. 975.79

This painting was acquired by Gertrude Stein (American, 1874–1946, in Paris after 1902) directly from the artist. After Stein died, her collection was entrusted to her companion, Alice B. Toklas (American, 1877–1967, in Paris after 1907) until her death. *Guitar on a Table* was bought by Nelson Rockefeller in 1968 from Stein’s estate. The painting was donated to Dartmouth College by Rockefeller, an alumnus of the college in 1975. The painting has hung at the Hood Museum of Art since the building opened to the public, in 1985.

Figure 7.37 Complete Provenance of Information (Hood Museum of Art)

Retrieved from the Hood Museum Website (no page number)

The production of the painting or source is followed from the point of its conception to the present. This kind of detailed provenance is what makes history and evidence nuanced, allowing learners of history, and others, to appreciate the passage of time. Such provenance allows for a type of thinking to be created and sustained in the practices of history.

It is a system that drives most countries of the world to show precision in the crafting of its history. On a recent visit to one of Germany’s historical sites, the *Topography of Terror Museum* in the capital Berlin, I photographed a historical source shown in Figure 7.38. This piece of evidence shows provenance.

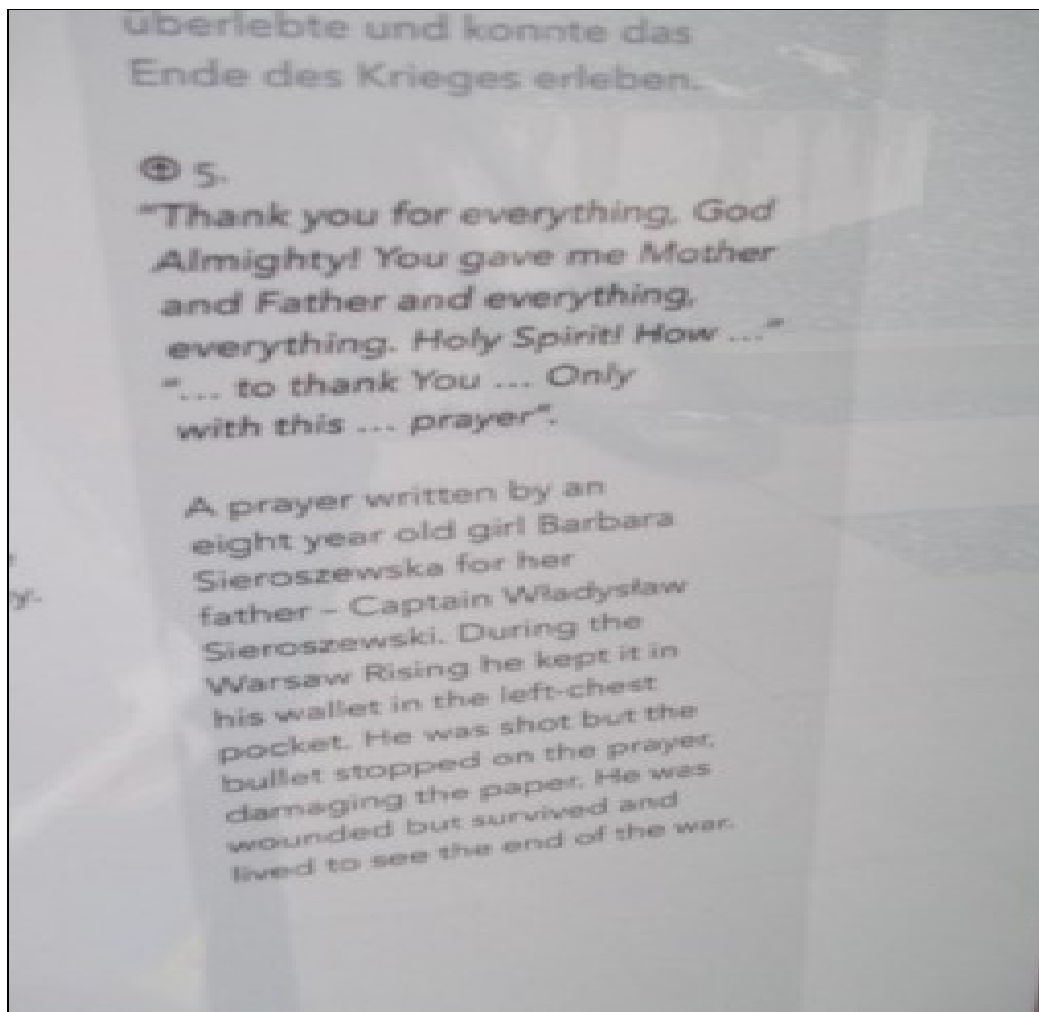


Figure 7.38 A Source from the Topography of Terror Museum (Berlin)

The information may not be as detailed as that from the Hood Museum of Art, but it would give a learner sufficient information needed to understand the context of the writer. It also adds to the development of empathy, as one can read into the emotions of the writer. In other words, it invokes an emotional response from the viewer and gives the reader a sense of what the writer is feeling. This would give learners knowledge of the event, but also a sense of what the circumstances would have been at that time to evoke such an emotional reaction. It infuses history with an element of reality and evidence and, since the use of evidence is a benchmark of procedural knowledge, it allows the development of historical thinking. This is the kind of practice that South African textbooks ought to be inculcating in their production of content. Such a technique would greatly enhance how sources are used.

7.4 Step Three: Cognitive demand

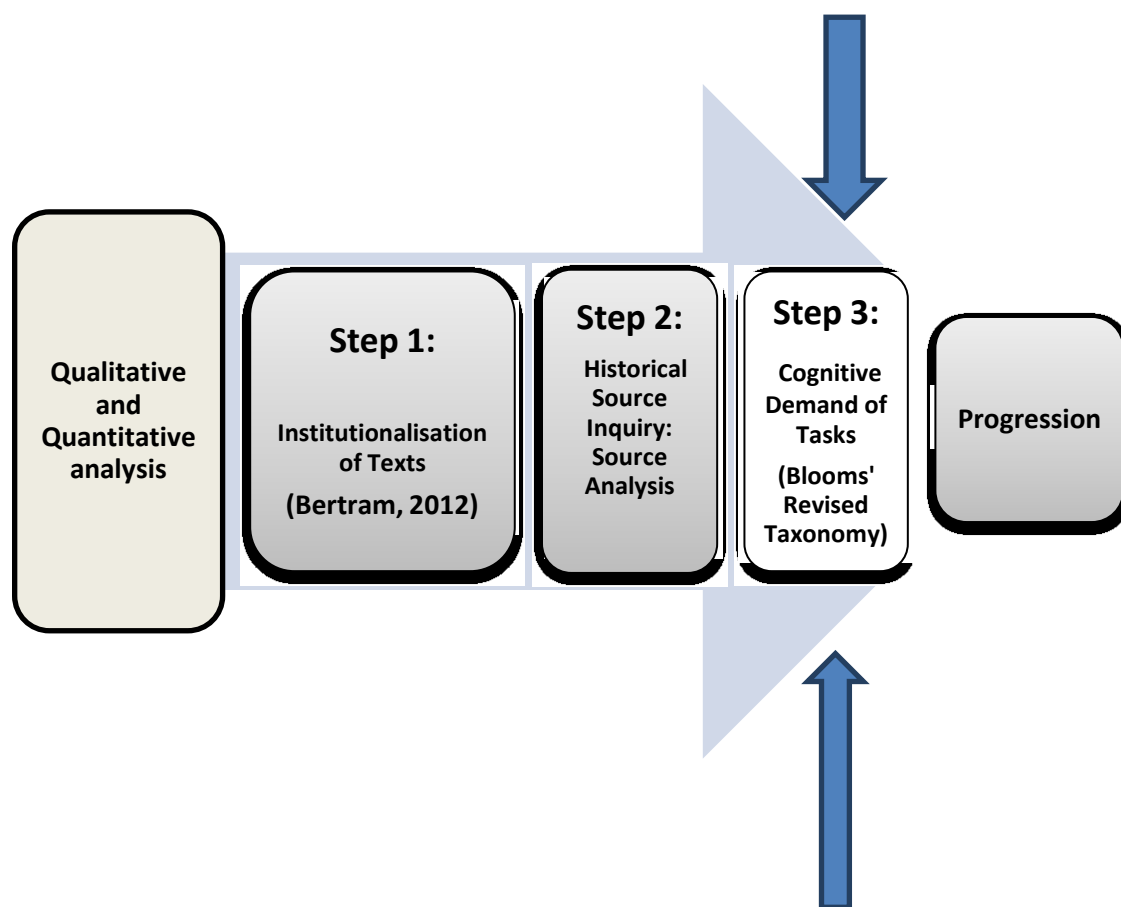



Figure 7.39 Step Three in Level Three

In this step the activities of the textbooks are numbered and coded separately and their cognitive demand analysed using Bloom's Revised Taxonomy (Krathwohl, 2002, p. 214, 215). Since there was no other popular or recommended method to gauge cognitive demand, Bloom's taxonomy for this analysis and applied it to the tasks or activities in a clinical and objective manner. There may be instances in coding where researchers could argue about category placement but then that is consistent with the nature of the discipline. However, I engage with the limitations of this tool and others in Chapter 9 where I reflect on the methodological issues.

The cognitive level of the tasks are ranked on Recording Sheets for the 'Cognitive Demand of Tasks' in Appendix C. The coding strategy is applied through all the sampled chapters in each of the textbooks. Tasks are then tabularised according to the main levels in the cognitive process dimension and presented for discussion.

According to the revised taxonomy, the main levels in the cognitive process dimension can be tabularised as follows:

Table 7.12 Levels of cognitive demand (Krathwahl, 2002, pp. 214–215)

Level	Descriptor	Increasing complexity
1.0 Remember <i>(Level One)</i>	Retrieving relevant information from long term memory	
2.0 Understand <i>(Level Two)</i>	Determining the meaning of instructional messages, including oral, written, and graphic communication	
3.0 Apply <i>(Level Three)</i>	Carrying out or using a procedure in a given situation	
4.0 Analyse <i>(Level Four)</i>	Breaking material into its constituent parts and detecting how the parts relate to one another and to an overall structure or purpose	
5.0 Evaluate <i>(Level Five)</i>	Making judgements based on criteria and standards	
6.0 Create <i>(Level Six)</i>	Putting elements together to form a novel, coherent whole or making an original product	

The result of this analysis is presented in Table 7.13 below:

Table 7.13 Level of cognitive demand in tasks analysed

Levels of cognitive demand	Textbooks used in the analysis						
	Gr. 3	Gr. 4	Gr. 5	Gr. 6	Gr. 7	Gr. 8	Gr. 9
1. Remember	6 (46%)	12 (46,2%)	17 (43,6%)	25 (58%)	15 (33%)	22 (30,6%)	22 (30,5%)
2. Understand	4 (31%)	10 (38,4%)	11 (28,3%)	12 (28%)	5 (11%)	19 (26%)	22 (30,5%)
3. Apply	3 (23%)	4 (15,4%)	3 (7,6%)	6 (14%)	8 (18%)	10 (14%)	5 (7%)
4. Analyse	0 (0%)	0 (0%)	6 (15,5%)	0 (0%)	4 (9%)	2 (3%)	5 (7%)
5. Evaluate	0 (0%)	0 (0%)	1 (2,5%)	0 (0%)	11 (24%)	15 (21%)	14 (19%)
6. Create	0 (0%)	0 (0%)	1 (2,5%)	0 (0%)	2 (5%)	4 (6%)	4 (6%)
Total number of tasks coded	13 (100%)	26 (100%)	39 (100%)	43 (100%)	45 (100%)	72 (100%)	72 (100%)

7.4.1 Findings and discussion

The results show that the number of tasks presented to learners increases substantially across the grades. As grades advance, so does the cognitive demand, as there are increasing numbers of tasks reflecting higher levels of cognitive demand. Grades 7, 8, and 9 show an increase in the number of tasks in the upper levels, with the Grade 7 text presenting the highest percentage of tasks engaging learners in evaluation. This particular chapter involved a great deal of evaluation on the part of the learner in Grade 7, as the topic “Colonisation of the Cape in the 17th and 18th centuries” has increased space for high level analysis and evaluation. This correlates with earlier coding which shows that this chapter has a total of 21 images in the form of paintings, photos and drawings, 5 sources, the highest amount of case studies in all the texts, 7 maps, 13 word-boxes and 45 activities/tasks.

There are greater opportunities for learners in Grades 7, 8 and 9 to engage in activities that require them to evaluate and analyse sources and to create narratives. Grades 3 and 4 have no tasks which foster any high cognitive level skills and this is perhaps related to the learners’ age and ability to function at such levels. However, Grade 6 presents 86% of its tasks in the lower levels and this is not related to their ability levels and age, because Grade 5 presents 2, 5% of the tasks in the high level of cognitive demand categories of Evaluate and Create. The expectation is that there would be some opportunity for learners to analyse documents, stories or events and to develop these skills, even though they are younger than the learners in higher grades. Lower grades have tasks within the lower level of cognitive demand which require learners to recall, remember and apply the knowledge. Almost 77% of the tasks in the Grade 3 are at the lower level, requiring learners to remember and understand knowledge, with a mere 23% of tasks prompting them to apply their knowledge. A similar scenario is applicable to Grade 4, with 85% of its tasks in the lower cognitive levels and a 7,6% increase in application activities compared to Grade 3.

There is clear progression in the cognitive demand as textbooks advance per grade. The higher grades show tasks which engage learners in the higher levels of analysis, evaluation and creation. The Grade 6 textbook is the only book from the sample which is not following the trend and there is a rationale behind this presentation. A

step back to view the chapter and evaluate it shows the topic of ‘Mapungubwe’ commencing with ‘Changing societies in the Limpopo Valley’, advancing to ‘Trade across Africa and across the Indian Ocean and beyond’, culminating in ‘Marco Polo explores Asia’. The content is presented as facts in the text with no opportunity for contestation and analysis. This is elaborated by the inclusion of only one source in the entire text. The chapter shifts across many countries, compressing many facts into a few pages and, therefore, learners are requested to recall what is being presented. This kind of information cannot be contested, as it is presented as the truth and as undisputed fact. The tasks centre on general recall and memory with 14% application skills, which is insufficient for a learner of Grade 6. This correlates with an earlier analysis which shows this chapter presenting 21 headings and sub-headings, 32 paragraphs, 21 pictures, 1 source, 7 maps, 0 case studies and 8 word-boxes. Although the chapter has all these pictures, maps and paragraphs, the learner does not engage with the information as historians do.

The scan below shows how the information is presented. The activities do not create any room for higher level cognitive demand requiring analysis, evaluation and creation. All the tasks are of lower order demand. The pictures are simply decorative content enhancers and learners are not asked any questions on them.

Marco Polo's influence on European traders and explorers

In 1295, Marco Polo returned to his home town of Venice in Italy. He didn't know that his city was being attacked by people from a neighbouring area. Marco Polo was arrested and thrown into prison. He spent one year in prison. During this time he dictated all his adventures to a fellow prisoner. After Marco Polo was released from prison, he made a book about his time in Asia. It was called *The Travels of Marco Polo*.

European traders who read *The Travels of Marco Polo* were amazed at all the things that Marco Polo saw in China. He described inventions such as gunpowder, different kinds of weapons, printing machines, musical instruments, kites, paper money and the magnetic compass. He brought home silk, jewels and Chinese clothes.

Marco Polo's book made Europeans want to develop trading networks with people in Asia. When Christopher Columbus read Marco Polo's book two hundred years later, he believed he could sail to the East by going west across the Atlantic Ocean. He did not know that North America was in the way. He was the first European to find North America. Marco Polo was the first European traveller to really explore another continent. You will learn more about European explorers in Topic 4.

Classroom activity 2.8

- List some of the inventions Marco Polo saw in China. } T44
- Why do you think European traders and explorers were so interested in Marco Polo's travels? } T45
- What mistake did Christopher Columbus make? } T46

Marco Polo's book was copied out by hand.

The Chinese printing block was used for printing.

A magnetic compass

Mapungubwe 39

Figure 7.40 A scan of knowledge presentation

Retrieved from *Social Sciences. Solutions for all*. Grade 6. Learner's Book, p. 39

Figure 7.41 shows a task (T44) coded in Level One of cognitive demand.

Classroom activity 2.8 } A magnetic compass

1. List some of the inventions Marco Polo saw in China. } T44

Figure 7.41 A task (T44) coded in Level One of cognitive demand

Retrieved from *Social Sciences. Solutions for all*. Grade 6. Learner's Book, p. 39

This example shows a task where a learner simply has to remember the inventions that Marco Polo saw in China. Nothing else is required of the learner, which is why the placement is in the lowest category of cognitive demand.

Figure 7.42 shows a task (T45) coded in Level Two of cognitive demand.

2. Why do you think European traders and explorers were so interested in Marco Polo's travels? } T45

Figure 7.42 A task (T45) coded in Level 2 of cognitive demand

Retrieved from *Social Sciences. Solutions for all*. Grade 6. Learner's Book, p. 39

The learner is required to have an understanding of why Marco Polo travelled in order to answer the question. The placement is in the 'understanding' category, or Level 2 of the cognitive demand rubric.

Figure 7.43 shows a task (T26) coded in Level 3 of cognitive demand.

Case study: The story of Galant's rebellion

Galant was a slave owned by a cruel farmer named Van der Merwe who beat his slaves and treated them very badly. In 1825, 25-year-old Galant and the other slaves heard that the colony might abolish slavery. They thought that they might be freed. But then Galant heard Van der Merwe saying that he would never give his slaves their freedom. Galant realised that he might be a slave for the rest of his life. He organised the slaves on nearby farms to rebel against their masters. Galant and the other slaves killed Van der Merwe and two other white people. Then they fled into the mountains nearby.

A group of soldiers came from Cape Town and caught Galant and the other slaves. They went on trial for murder. At the trial, Galant and the other slaves told the court how Van der Merwe had treated them. He told them that he had complained to the authorities about the cruelty three times but nothing had been done. The court found Galant guilty of murder and he and two other slaves were executed.

CSI

Case study: The 1808 rebellion


In 1808, a slave called Louis led a rebellion. He was very light-skinned, and many people thought he was white. He led a group of slaves and Khoikhoi people to Cape Town, where they planned to take over the store of weapons. Then they planned to talk to the authorities about peace and freedom for all slaves. } CS2

They marched to Cape Town, gathering over 300 slaves and Khoikhoi servants along the way. When they got close to Cape Town, they were met by a group of soldiers. The soldiers were armed and they defeated the slave group. They captured 327 of the rebels and put 47 of them on trial. Altogether, 20 rebels were sentenced to death. Others were put into prison for taking part in the rebellion.

Classroom activity 6.8

Work on your own. Read through the two case studies about slave rebellion and then answer these questions.

1. Why did the slaves in each rebellion rise up against the slave owners? } T24
2. What was the aim of each rebellion? } T25
3. Explain why the rebellions failed. } T26



Slaves were not allowed to own guns, so they often armed themselves with farm tools.

Figure 7.43 A task (T26) coded in Level 3 of cognitive demand

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, pp. 133–4

The third task in Classroom activity 6.8 (T26) is coded as Level 3 in its complexity of cognitive demand. This coding has been done because the learner would need to understand the circumstances of both rebellions in order to explain why they failed. Since this explanation requires an application of knowledge after understanding it, the task is classified in the third level of 'Application'.

Figure 7.44 shows a task (T9) coded in Level 4 of cognitive demand.

KEY

- 0-200 mm
- 200-400 mm
- 400-600 mm
- 600-800 mm
- 800-1000 mm

KEY

- Late summer rain
- Winter rain
- Summer and winter rain
- Mid-summer rain

M2 ANTIC OCEAN

Cape Town

INDIAN OCEAN

This map shows how much rain the different areas of the Cape get.

M3

Cape Town

This map shows which areas of the Cape get rain in the summer or the winter.

Classroom activity 6.2

Work on your own and complete these tasks.

- Draw a map of the Cape. Use the two maps on this page to help you.
Fill in these details on your map:
 - Where the Khoikhoi lived } T6
 - Where the San lived } T7
 - Where the Xhosa lived } T8
 - Which areas get the most rain } T9
 - Which areas get rain in summer } T10

Figure 7.44 A task (T9) coded in Level 4 of cognitive demand

Retrieved from *Social Sciences. Solutions for all*. Grade 7. Learner's Book, p. 123

This example refers to the fourth bullet in Class Activity 6.2. It is a task (T9) coded in Level 4 of the cognitive demand rubric because it involves reading and analysing each map, studying and understanding the key and applying the key to the map. Thus the activity is coded in the 'Analysis' level of cognitive demand.

Figure 7.45 shows a task (T16) coded in Level 5 of cognitive demand.

Source A

Jan van Riebeeck wrote a journal about life at the Dutch settlement. In this extract from his journal, he writes about a meeting with the Khoikhoi leaders about the land.

They said, 'If you get many cattle, you come and take over our pasture with them, and then say the land is not wide enough for us both! What is more fair – for the natural owner of the land to leave, or the foreign invader?' They insisted on this point, but we told them that they had lost the land in war, so they could not expect to get it back. We were going to keep it.

(Source: Adapted from: *The Sahara is the biggest desert in the world. Africa One Continent Many Worlds.* California Academy of Sciences. Available from: <http://www.calacademy.org/exhibits/africa/exhibit/sahara/>)

Classroom activity 6.3

Work with a partner and read **Source A**. Look up any words you do not understand in the dictionary. When you understand the source well, answer these questions.

1. Who wrote this source? } **T14**
2. What point were the Khoikhoi leaders making? Use your own words. } **T15**
3. Van Riebeeck tells the Khoikhoi leaders that they have lost the land in war so they will not get it back. Do you think this is fair? (In your answer, you can also think about how the Khoikhoi got the land.) } **T16**

• Topic 6 Colonisation of the Cape 17th–18th centuries

Figure 7.45 A task (T16) coded in Level 5 of cognitive demand

Retrieved from *Social Sciences. Solutions for all.* Grade 7. Learner's Book, p. 125

The task numbered three in Classroom Activity 6.3 (T16) requires learners to read the source and then to evaluate the fairness of Van Riebeeck's decision that the settlers were going to keep the land. This requires learners to read and analyse the source in order to obtain an opinion. Such an opinion would involve an evaluation of van Riebeeck's claim. This is not a simple opinion. The first part of the question deals with van Riebeeck's justification for not returning the land of the Khoikhoi. He claims

that they had won the war against the Khoikhoi and therefore they are entitled to keep the land. The second part specifically asks the learners to consider how the Khoikhoi got the land. Then learners are expected to weigh the circumstances before giving an evaluation. Like a judge who hears both sides of a case before a verdict is given, pupils have to analyse both van Riebeeck's argument and the Khoikhoi claim to the land. The task then calls for judgement about rights and is, therefore, not a simple opinion. The reason why it is coded in Level 5 is because it involves an 'evaluation' of whose rights count as superior.

Figure 7.46 shows a task (T54) coded in Level 6 of cognitive demand.

Classroom activity 8.15


Work with a partner and complete this task.
The ANC in exile had a radio station that broadcast from different countries in southern Africa. It was called Radio Freedom. People in South Africa could listen to it in secret, but it was dangerous because the ANC was banned and people could be jailed for listening.

Imagine you are an announcer on Radio Freedom. You are announcing the birth of a new organisation, the UDF. Write the news clip and make the announcement to your class.

T54

*This is
Radio
Freedom*

P15



224 • Topic 8 Turning points in South African history: 1960, 1976 and 1990

Figure 7.46 A task (T54) coded in Level 6 of cognitive demand

Retrieved from *Social Sciences. Solutions for all*. Grade 9. Learner's Book, p. 224

This task involves the creation of a new identity: a radio announcer. The learner has to also create, by imagination, a new circumstance affected by certain political issues and a news clip for class presentation. The activity requires high level skill and is, therefore, coded in Level 6 or the 'Create' level on the cognitive demand scale. This activity requires that learners have a substantial historical knowledge about the struggle against apartheid and South African resistance movements. They have to have knowledge of the principles of both the ANC and the UDF, for instance, that both were resistance movements, but with different mind-sets, which is why the UDF formed its own group. Learners would need to know why the ANC was banned and why people could be jailed simply for listening. In order to make the announcement to a large audience of listenership, learners would need to express the principles of the UDF and why this new organisation is a better than the ANC. They would need to pen out an emotional response that would attract people listening to Radio Freedom and to the UDF.

7.5 Conclusion

In this chapter, the third level of analysis was engaged with in three very distinct steps. Each step is shown diagrammatically and is accompanied by a purposive tool designed to analyse particular bits of information, which when pieced together, contribute to a better understanding of the phenomenon of progression. Each step is linked with theory, and from the theory, a language of description is developed to generate data that can be described and compared.

The first step involved the 'institutionalisation' of segments of information in textbooks to determine how they fit into four domains of the historical gaze. The results show to what extent content, language and procedures are specialised to history, integrated with other subjects or generic. The second step involved an analysis of sources to determine how many were present in the text and how learners developed historical thinking while engaging with them. The final step involved analysing the cognitive demand of the tasks in the textbooks to determine the levels at which pupils are required to work. Each step is also accompanied by examples of how the coding took place and a discussion of the data and findings follows.

CHAPTER 8

DISCUSSION AND FINDINGS

8.1 Introduction to the chapter

The purpose of this chapter is to bond all previous discussions so that important trends and patterns that were observed can be described towards a coherent understanding of progression in these seven textbooks. It also documents the progress of the study towards answering the critical questions of the research. An investigation into the phenomenon of progression required in-depth analysis that was structured into parts in order to promote order and coherence. Particular chapters across seven graded textbooks were sampled for analysis because they tell the story of South African history.

Data analysis proceeded in three levels, each designated to generate very specific data and to allow theory to direct choices of what the unit of analysis would be in each case and what kinds of tool would be suitable to provide answers to the research questions. The results were recorded on specifically designed recording sheets which are presented in the Appendices. The first level involves a qualitative overview, or the initial perceptions of the chapters selected for analysis, to get a sense of how South African history shifts in time and space and how knowledge becomes more decontextualized as time advances chronologically. At that juncture, the direction of the other two levels was clarified. The second level analyses how textbooks use genre as a tool to develop progression in historical knowledge and how reading and writing production within the genres expand first-order and second-order concepts in history. There is also a focus on how nominalisation, skills and concepts chart progression across the grades.

The final level is further sub-divided into three steps, each following with a particular purpose. The initial step is towards understanding how textbooks develop a historical gaze or how they are ‘institutionalised’, the second examines how textbooks conduct historical inquiry and the final step determines the cognitive demand of the tasks in the textbooks. All of these levels and steps present a grasp of the phenomenon of historical thinking with an intention of understanding how progression manifests in the range of textbooks selected for analysis. The recording sheets presented in the

Appendix Section show ‘Institutionalisation’ (Appendix A), ‘Use of Sources’ (Appendix B) and ‘Cognitive Demand’ (Appendix C).

8.2 Level One

The initial qualitative view indicates that all the texts show progression in the designated categories of ‘Time and Space’ (used to denote context or locality and its changes in the chapters) and ‘Concepts Extracted’ (used to denote the new concepts introduced), indicating a building of both the substantive and procedural dimensions of knowledge. The qualitative analysis also includes a tabulation of the chapter’s overall engagement with the broader second-order concepts such as cause and consequence, historical significance, use of primary source evidence, identify continuity and change, take a historical perspective and understand the moral dimension of historical interpretation. The results here also show very specific nonlinear progression in the introduction and engagement of various concepts at grade points and in different degrees throughout the texts.

8.2.1 Time and Space

History, for the young historian in Grade 3, is initially strongly contextualised or ‘localised’ in the immediate family environment and then progresses in Grade 4 to the local or town history. In Grade 5 learners are transported back in time to an entirely unfamiliar context to understand the lifestyle of the early inhabitants of southern Africa. Learning becomes even more decontextualized in Grade 6, when African societies situated in the Limpopo Valley in 900 AD are investigated. New people, cultures, the advent of globalisation and European exploration open up the world spaces with study of different countries and continents becoming linked with South African history. There is greater map coverage, greater distance travelled, beyond national boundaries to international contexts. In Grade 7, the 17th and 18th century social, political and economic upheavals are explored after the colonisation of southern Africa. In Grade 8, the Mineral Revolution and all its complexities provide detail of the events in the 1880s. This lengthening and broadening tendency in history knowledge is further augmented in Grade 9, when boundaries extend further to encompass the study of the turning points in South African history since 1948, including larger time study periods, and greater numbers of participants after

colonisation. More events and incidents, told from a variety of viewpoints, make for interesting multi-perspective history. Time and space, therefore, are important signals of progression in both substantive and procedural knowledge. History appears to be a subject that builds knowledge both ‘vertically’ and ‘horizontally’. The number of concepts increases and within each concept is substantial or dense meaning that can be associated to various other contexts. For example, ‘colony’ can be understood as the Cape becoming a colony of Britain. It can also be associated with various colonies around the world, without being confined by temporal or political borders (space).

The ‘verticality’ of history can be demonstrated in the understanding of ‘genre order’, a type of chronological or organised writing with increasingly complex language resources for advancing development phases. In terms of ‘conceptual order’ there is no clearly defined continuum. The only reflection of concept advancement is in its abstraction, nominalisation or lexical density. Chronology is the main signifier in the advancement of certain understandings. For instance, the struggle for democracy in South Africa can only be understood against the background of the apartheid history. In temporal terms, this would amount to learning about apartheid struggle before democratic victory.

As far as the substantive dimension is concerned, the knowledge is shown to shift from very simple and contextualised concepts to complex and decontextualized concepts. Time is one of the principles that signals progression and the CAPS curriculum is chronologically arranged, at least in the later years of school history. Time is also generated in the meta-concepts of ‘cause and consequence’ and ‘change and continuity’, which show its passage and the effects of its passage. These procedural concepts show progression in the way they are used but in varying gradations. There is no consistent reference or pattern in their appearance or use. Therefore, it can be stated that progression in the procedural dimension is staggered and nonlinear.

8.2.2 Concepts extracted

Language is couched in words and words are sometimes simple and everyday and at other times can be semantically dense and abstract. The word ‘concept’ is explored in earlier sections and its power to be semantically dense or weak is discussed. A word

like ‘colonisation’ is a semantically dense concept that has a universal meaning. The concept of ‘colonisation’ is also a specific abstract idea that is tied to a multitude of contexts. In earlier discussion, reference was made to how words or concepts can be tied to a learner’s context and therefore its meaning can be easily accessed and understood (strong semantic gravity). Conversely, when words and concepts have double meanings and are not linked to an everyday understanding or are outside the experience and context of the learner, then those words, concepts and knowledge would have weak semantic gravity. This makes the knowledge decontextualised, abstract and complex. The meaning of these concepts have to be unpacked so that it is accessible to the learner.

In this level of the analysis, the transit of words in the different grades is observed and extracted to view their relationships. History in Grade 3 commences with very simple, concrete and everyday language and then advances in higher grades towards greater complexity and abstraction. Although the discourse in lower grades is not strongly historical, there is a piecemeal construction of concepts which seem to develop both in length and breadth along the grade continuum. New words and concepts have more historical content or become more specialised with regard to history and its context. For example, ‘colonisation’ in Grade 7 has both a contextualised meaning (in southern Africa) and decontextualized meanings where different countries have colonised continents further away.

It seems that words that are semantically ‘dense’ or abstract are introduced in higher grades which indicates that the choice of concept introduced is commensurate with learner ability. This is perhaps why ‘colonisation’ is introduced to Grade 7 learners and not Grade 4. Concepts that are included in Grade 8 and Grade 9 also require more explanation, as they are not everyday words or language but are more complex and specialised to history. The development of historical concepts is also accompanied equally by a growth in the amount of content attached to it. This is suitably illustrated by the two examples below which depict the historical concept of a timeline taught in Grade 3. It is then compared with a timeline taught in Grade 8. The concept is essentially the same: teaching the young historian how to chronologically arrange the order of events. However, the Grade 3 learner engages with events in their own

personal history. The language is simple and concrete and the nature of the knowledge strongly contextualised to their own immediate environment. In Grade 8 the language is largely historical, presenting a large number of facts about many personalities and their important contributions over a large space of time. The knowledge is largely decontextualised and complex. It requires not only an understanding of a timeline, but also that the learner be highly proficient in comprehending various time periods, events and personalities.


Unit 1 About Me WEEK 1
Activity 3


What is a timeline? } H1


Rishon's history } H2


A timeline enables you to see important information about your past life, to recognise achievements you have made and helps you plan what you would like to do in the future. } K1


Read the story of Rishon's history.


2011 baby sister was born  P1

2010 family moved to a new home  P2

K2 2009 started going to crèche  P3

2008 fell and broke his arm  P4

2006 celebrated first birthday  P5

2005 born in Umhlali  P6

Read the events of Rishon's history. } T1

Do you see how the timeline tells a story? } T2

Unit 1: About me 1

Figure 8.1 A scan of Text One: Grade 1, Unit 1. (p. 1)

Word bank A B C
 deputation a group that goes somewhere to make a specific demand
 petition a demand signed by many people

WB13
 The TIC was formed by Mahatma Gandhi, an Indian lawyer who came to work in Natal. He fought against discrimination against Indians in Natal and in the Transvaal. Indians were not allowed to buy land and had to live in specific areas. The TIC sent petitions and deputations to the government to change its laws. It also used passive resistance campaigns such as the Satyagraha Campaign of 1913–1916.

H24 **1902** **Defeat of the Boer republics**
 Paul Kruger led the Boers in the war against the British Empire.

P14 **K57**

P15 **1902** **Mahatma Gandhi helped found the TIC. He became famous for using non-violent forms of protest in South Africa and in India.**

K58 **Transvaal Indian Congress (TIC) was founded** **H25**

K59

1906 **Bambatha Rebellion** **H27**

K63 After the South African War that ended in 1910, there were four separate areas controlled by Britain. These were the colonies of Natal and the Cape, as well as the old Boer republics (Transvaal and Orange Free State), which had been taken over by Britain. In 1910, Britain united these four into one country, the Union of South Africa. The Union of South Africa was more independent and could make many of its own laws. Black people knew that Union would mean that they would not be treated fairly, because the Boers would be in control, and they had discriminated against black people in the republics.

1910 **Union of South Africa** **H28**

K60 **1902** White foreigners in the Transvaal were known as Uitlanders, and most came from Britain. They were not allowed to vote in the Transvaal's elections. Britain and the government at the Cape Colony supported these Uitlanders, who were angry that they could not vote. In 1895, a British leader tried to invade the Transvaal. They did not succeed, but it made the situation between Britain and the Transvaal very tense. They went to war in 1899. The Orange Free State supported the Transvaal in the war. Many black people supported Britain because they thought Britain would give them more rights if the area was taken over by Britain. The two Boer republics were defeated in 1902, and became British territories.

K61 **1902** **African Political Organisation (APO) was founded** **H26**

The APO was started to help Coloured people in the Cape. Coloured people were not allowed to vote and the APO worked to change this. It also helped to educate Coloured people. The APO was popular and many people became members. It sent petitions and deputations to the government to try to change racist laws.

P16 **K62**

Abdullah Abdurahman was the leader of the APO for 33 years.

K64 **1906** The British imposed a poll tax in Natal – all Zulu men over 18 had to pay this new tax. The purpose of this tax was to try to force them to become workers on the farms. They were already paying a hut tax and a dog tax. Chief Bambatha of the Zondi clan and other chiefs started a rebellion against the British over this tax. They attacked the British from the Nkandla Forest, but the British sent in troops who defeated the Zulu fighters. About 3 000 Zulu soldiers were killed in the fighting. Bambatha was also killed and his head was cut off.

P17 **1910** This photo shows two of the rebel chiefs who took part in the Bambatha rebellion.

164 • Topic 6 The Mineral Revolution in South Africa

Topic 6 The Mineral Revolution in South Africa • **165**

Figure 8.2 A scan of Text Six: Grade 8 (p. 164–165)

8.2.3 Second-order concepts

This analysis concerns the specific procedural concepts which order or shape the discipline of history. The following Table 8.1 illustrates how the qualitative analysis noted the evidence of these constructs in the texts.

Table 8.1 Procedural concept prompts

Procedural Concepts	Evidence in texts						
	Gr 3	Gr 4	Gr 5	Gr 6	Gr 7	Gr 8	Gr 9
1. Establish historical significance	√	√	√	√	√	√	√
2. Use primary source evidence	√	√	√	√	√	√	√
3. Identify continuity and change	√	√	√	√	√	√	√
4. Analyse cause and consequence	√			√	√	√	√
5. Take historical perspectives					√	√	√
6. Understand moral dimensions					√	√	√

This table presents summary of how the second-order concepts feature across the textbooks. Chapter 5, which presents the qualitative analysis across the textbooks, also contains a description of how these procedural concepts were coded. However, these descriptions are more detailed, indicating how my judgements were made. The second-order concepts are not quantifiable and by their nature are regarded as fluid and complex. A way had to be found to analyse the textbooks using the criteria of Seixas (2006). I used a table to indicate their presence and columns to describe whether they were weakly or strongly presented in the textbook. Chapter 5 discusses how each textbook engages with the historical conceptual challenge by providing examples out of the text. It describes how each second-order concept was coded across all the textbooks in the range.

While these books were coded as such it is significant to note that the conceptual demand within these books were different from each other and this is engaged with in Chapter 5. It was noted that second-order concepts like historical significance were different for lower grades, partly because there was lesser content knowledge to deal with or perhaps the level of the child dictated that simpler uses of the concept be

demonstrated through the text. Lee & Shemilt (2009, p. 43) argue that conceptual apparatus must be mastered at common-sense or first level before a student can write explanatory notes. From this it may be understood that a Grade 3 textbook for a young learner cannot engage with the concept of 'historical significance' in an advanced manner. Textbook authors and teachers alike would have to signal this concept through simplified ways.

At Grade 3 level, there is an immediate introduction to historical significance and appreciation for objects from the past and an inherent motivation for the preservation of objects in Grade 4 and Grade 5. While there appears to be a staggered start to the implementation of the second-order concepts, there is an eventual inclusion of all in the higher graded textbooks. It is clear that there is a very specific nonlinear progression in the introduction and engagement of various concepts at different points in the graded continuum. It is also certain that they operate at different degrees throughout the texts.

One cannot attain precision in the degrees at which they operate because they are represented in the depths of language which is essentially an abstract phenomenon. Whilst there are primary sources in the texts, there is also evidence to suggest that learners are not engaging with the trustworthiness of the primary sources. Some of the questions on the sources, particularly in lower grades seem to be generic comprehension questions. The section on historical enquiry, where sources are actually analysed, provides more conclusive data.

8.3 Level Two

This section considers how the types of reading and writing with which learners engage displays progression in historical thinking across the sampled texts. The reading and writing production is closely knit with the type of genre textbooks utilised as a tool to build skills. Also considered is the number of nominalisations in the text as well as how new concepts are explicitly taught. All of the categories mentioned are governed by the skills learners are required to exhibit while engaging with the texts. In-depth findings, and discussion of these categories is executed in Chapter 6. Here, these findings are condensed within each category to explain how they are used to answer the critical questions of the research.

8.3.1 Reading

Reading engagement commences, as in the previous analysis, in the earlier grades and is related to the immediate context/environment of the learner where people, objects and events are familiar. Language in the earlier years is nontechnical, involving simple clauses which can be read with ease, while texts in later years present technical, abstract vocabulary with dense, compacted information. Reading in all the textbooks is augmented with visual images and photographs which are also simple and large. Reading extracts take on greater levels of complexity with a steady increase in the length of text and the number of words, which are also smaller, denser and compacted on the page in higher grades. Language is more everyday in the earlier grades and becomes increasingly universal, shown by a growing abstraction of concepts in higher grades.

Vocabulary becomes more semantically dense and specialised to history (universal historical concepts like colonialism). Reading complexity increases in the type of texts (genre) learners engage with. Interviews, political cartoons and autobiographies are presented in formalised, academic language. Movement is thus observed, from simple/concrete/contextualised reading, to an unfamiliar time and context, demanding background knowledge and understanding. This, in turn, shows a steady increase in substantive knowledge which commences as highly contextualised and progresses towards a highly decontextualized form which becomes familiar only if content is gradually unpacked.

8.3.2 Writing

A clear pathway of development or progression is paved through the grades. The Grade 3 learners are not compelled to write any text, but are required only to read and observe. This scenario shifts progressively in higher grades, with learners required to tabularise, list, record observations and then write longer explanations in Grades 6–9. Some writing tasks collapse boundaries between the disciplines of history and geography because activities in a history textbook require map skills acquired in geography. As the grades progress, there is more concern about the form and construction of texts which includes very specific structuring, describing backgrounds to events and the causes, changes and effects of events. Pupils begin writing simple sentences or questions (like an interview schedule in Grade 4), then they write longer

explanations (explaining what sacred leadership means in Grade 6) to greater interpretations in paragraphs and essays in higher grades (Grades 8–9). There is an eventual progression towards genre development and writing for a purpose. Progression is noted in the substantive dimension where learners are required to know and write many more history facts. The growth in the procedural dimension is noted in the shape and structure in the writing of these facts through the grade continuum.

8.3.3 Conceptual demand

Conceptual demands range on a scale from concrete to being conceptually demanding, abstract and semantically dense, becoming increasingly specialised to history. Again, there is a gradual increase in substantive knowledge (from highly contextualised knowledge to strongly decontextualized knowledge), indicated in the growing number of dense facts that learners are required to assimilate. The procedural dimension of these concepts are the ways in which learners are required to use them and this is discussed in the section on skill advancement.

8.3.4 Nominalisation

Nominalisation refers to the language resources within a text that add to its complexity, abstraction and density. The analysis shows a steady increase in nominalisation across grades. Nominalisation is thus a key principle for charting progression across texts. It is also related to conceptual progression (not the second-order concepts in history), as words which are dense in meaning and specialised to history can be context explained and understood if related to an event. This study, thus, claims that abstract concepts in a text remain abstract until their meaning is unpacked and substantiated. A concept like ‘resistance movement’ can best be understood in a context such as that of the apartheid era. It also requires extensive explanation and foundational knowledge. Learners in higher grades may be able to unpack this term successfully, but it could be more of a challenge to those in lower grades. It is also clear that significant nominalisation is tied to ability, grade level and the maturity of learners.

8.3.5 Skills development

Learners are expected to build a repertoire of skills as they advance through the grades. These skills commence with looking and observing, then progress to reading

and understanding, then writing in sentences, matching and listing. These introductory skills can be used together to develop skills that are more advanced, such as analysing, comparing, debating and evaluating. Judgement, interpretation and formulation of a perspective on sources are more demanding on learners. The skills work together with the learner's ability to write information as they write more about what they understand. Learners are usually assessed on what they write in projects, tests and tasks and so their ability to demonstrate these skills in writing is of equal value. They are introduced by the texts gradually as they advance in the grades. The texts can be used in very generic ways in a history classroom and they can also be used to harness specialised skills which are pertinent to a historian.

The results of this analysis show that there is progression in both generic and specialised ways that the learners interact with texts. Learner advancement is seen from the basic extraction of information in lower grades, to advanced engagement with sources in higher grades, requiring interpretation, exploration and inference. The diagram below, Figure 8.3, illustrates how each grade advances in the skill requirements of each grade, including all of those that were required before and extending on the ability level of the learner. Also noted in the diagram is that the skills in higher grades require more understanding as they advance in complexity. A particular task, like source-based investigation in Grade 9, requires reading, analytic, comparative, discursive, descriptive, comprehension, explanatory, interpretive, argumentative, sequential, recording and debating ability, as well as the ability to write essays which include appropriate content, language and structure. There appears to be an abstraction and complexity to these tasks which require maturity, a substantial knowledge base and success with previous skills on the continuum.

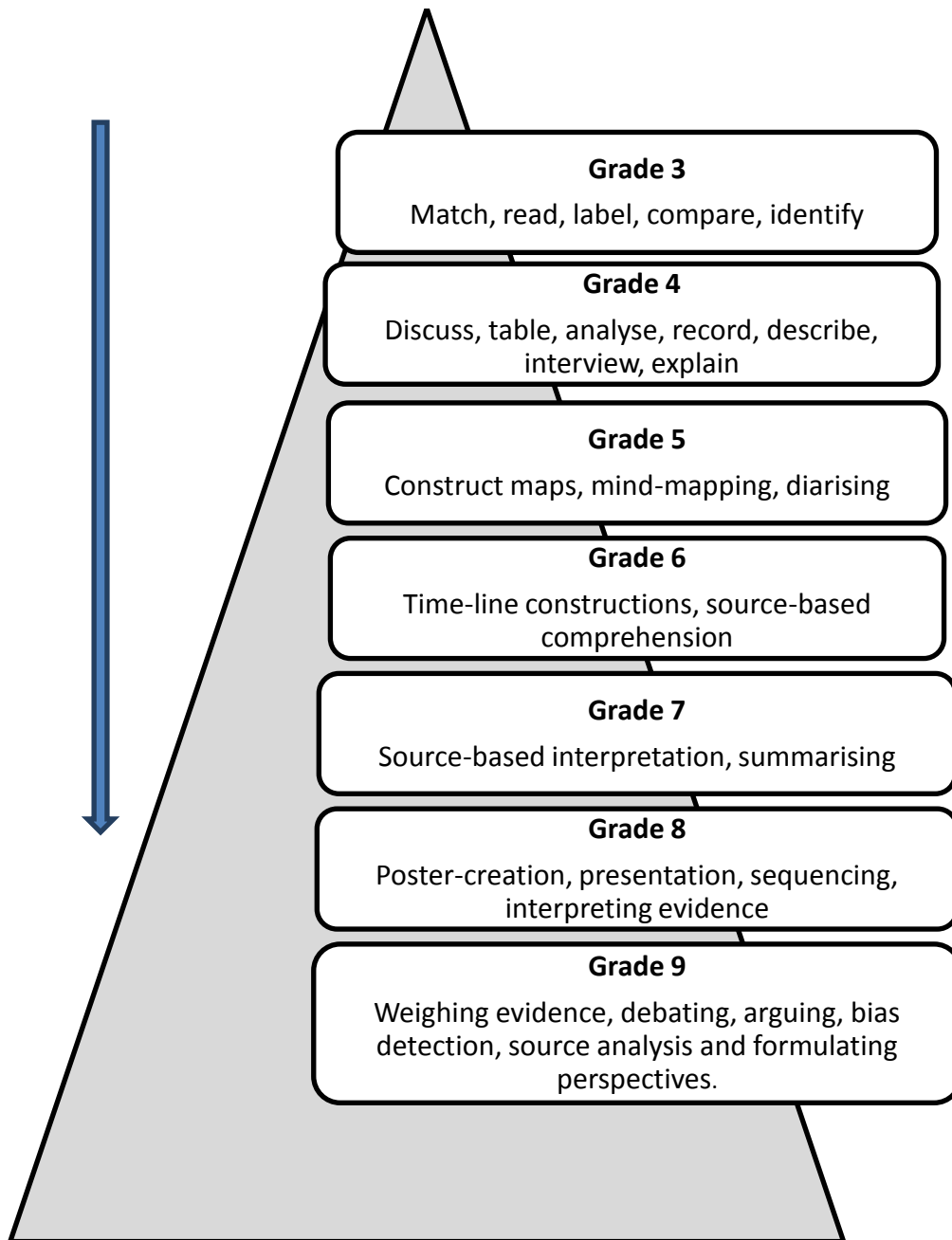


Figure 8.3 Increasing complexity and abstraction in skills

8.3.6 Genre development

Genre production is linked to the earlier sections on reading and writing production. The texts in this study demonstrate progression by first engaging the autobiographical genre (Grade 3: Rishon: My life history), then the biographical genre (Grade 6: Fatima Meer), and finally to the background, context, causes and evaluation of an event (Grade 9: Mineral Revolution). Learners become acquainted with text structure while reading and are introduced to different presentations and organisations of factual material. These fit into a certain structure of writing or type of genre. There is directional movement from recording genres to interpretation genres, governed by a chronological framework. The chronological frame, however, appears ill-defined in earlier years, becoming clear only in Grade 6 and then firmly establishing itself in the later grades.

The text structure in lower grades takes a simplified format. In fact, lower grades do not have any clear narrative structure. There is development of a clear narrative structure only in the higher grade textbooks, and a chronological framework only becomes clear from the Grade 6 textbook onwards. Similarly narrative texts and detailed description of specific historical events only start appearing in the Grade 6 textbook. It seems that learners in Grades 3, 4 and 5 are hardly being inducted into the key concepts of history such as narrative, chronology and specific historical events. The Grade 7 text presents much of its information in the chapter for analysis as a bulleted account or abbreviated narrative. The text structure in higher grades presents background information to an event (contextual), then on the people in the event, the structure of the event (beginning, middle, and end) and the causes and effects of the event. This kind of structuring is expected to be internalised by the learner, eventually to be used in their own written essays, reflecting a similar chronological and genre-based framework.

8.4 Level Three

8.4.1 Institutionalisation

Using the domains provided by institutionalisation as an analytic tool and a language of description for each of the segments denoting information in the text (headings and sub-headings, paragraphs, pictures/photographs, cartoons, activities and case studies),

coding was undertaken. The results show fluctuating percentages across the grades in the different domains.

According to Bertram (2012), as learners progress from lower to higher grades there ought to be a shift towards the Esoteric Domain so that learners are inducted into the specialised procedures of the discipline to gain mastery over both history content and specialised procedures. Focusing on the activities of the grades, there is greater emphasis in the Expressive Domain, where the content knowledge is historical but utilises generic procedures. At Grade 9 level, there is movement towards 26,4% of tasks in the Esoteric Domain, but 51,4% in the Expressive Domain indicates that more tasks are generic and are not specialised to history. Bertram (2012) does not argue that all school history tasks be exclusively located in the Esoteric Domain, since it is necessary to make links with learners' everyday knowledge and knowledge of other subjects, especially in the primary school. The coding of 80% of Grade 4 tasks in the Public Domain may be sufficient to give learners a good grasp of language before entry into history content knowledge. Likewise, the predominance of tasks in the Expressive Domain may be appropriate to focus on substantive knowledge rather than procedural. The concern, however, lies in the Grade 8 coding, where 40% of its tasks appear in the Public Domain.

Pedagogically, if teachers recognised this, they could make conscious decisions about how to move learning from the public domain (where procedural knowledge is generic and substantive knowledge is everyday) to specialised domains. Of the 77,8% of tasks in Grade 9 occupying the Esoteric and Expressive Domains, 51,4% of these are in the Expressive Domain. The main focus in Grade 9 is on substantive knowledge and it may be appropriate to focus on this rather than procedural knowledge because of the extensive rather dense and complex new content. This view can be applied to other grade analyses. There is no ideal ratio of substantive to procedural knowledge. Since both types of knowledge are integral to the development of historical thinking, textbook authors make considered decisions around content and procedures based on the type of topic or theme. This analysis merely strives to understand how progression is reflected in both specialised substantive and procedural knowledge when they are recontextualised in textbooks.

8.4.2 Historical inquiry

Using the tools of institutionalisation and the domains as an analytic tool and a language of description, the segments in textbooks that are labelled as a ‘source’ were categorised within the domains. They can include any segment of information such as pictures, photographs, cartoons or case studies, provided they are qualified as a ‘source’ by the textbook. Unlike the other segments which are not labelled, this particular analysis deals specifically with how a ‘source’ is utilised.

This analysis shows that there are no labelled source items in lower grades. The first source labelled as such is in Grade 6, which was categorised in the Expressive Domain. To extend this trend, both Grade 8 and Grade 7 show that 68% and 80%, respectively, of sources coded are found located in the Expressive Domain, which implies that sources are utilised in very generic ways and the focus is on substantive knowledge rather than procedural. A source, particularly a primary source, has a very definite purpose in history and ought to be used in specialised ways. The results of the first level of analysis, involving the six procedural benchmarks, is displayed in Table 8.1, Procedural Concept Prompts. It shows an engagement with the use of primary sources, but the only grade which interrogates the trustworthiness of sources is Grade 9. It is only here that learners are actually comparing primary sources with the intention of creating an explanation. The Grade 9 analysis indicates 72% of tasks located in the Esoteric Domain, showing how sources are used in specialised ways. Progression in these seven textbooks is not achieved in a regular, consistent and straightforward manner, but sporadically and in a nonlinear way. Other grades do not engage learners in activities that interrogate the sources for trustworthiness and are not required to write explanations on the credibility of sources. One glaring anomaly of source utilisation in the textbooks is that they are insufficiently contextualised. Lack of provenance proved to be a major challenge in all the textbooks. Incomplete information about the sources results in the learners not being able to work like historians. These details are required for disciplinary history to be done.

8.4.3 Cognitive demand

Whilst there is an increasing amount of tasks per grade, the cognitive demand of these tasks seems to be located in the lower levels of the rung which do not allow learners sufficient opportunities for high level thinking. The purpose of school history is to

induct learners into the discipline and to support principles of transformation, democracy, human rights and social justice. This ambition would need to be supported by high level questioning and activities in textbooks designed to allow learners to master both content and specialised procedures. Lower grades do not have activities which have high cognitive demands and this, perhaps, is appropriate, considering the level of maturity and development of the young learner.

A focus on Grade 9 shows 61% of tasks are in Levels 1 and 2 (Remember and Understand), 14% in Levels 3 and 4 (Apply and Analyse) and 25% in Levels 5 and 6 (Evaluate and Create). One can argue that 61% is too extensive for Level 1 because the social science policy document (DoE, 2011c) suggests a weighting of 30% for lower order (Knowledge and Recall), 50% for middle order (Comprehension and Application) and 20% for higher level processes (Analysis, Evaluation and Synthesis) (using only three levels for its cognitive dimensions) in designated tasks and formal assessments (see Table 2.5 of this thesis showing Cognitive Levels in CAPS Formal Assessment). These results are off the mark as far as the policy expectations are concerned. The Grade 6 textbook shows that 80% of tasks are lower level. The textbook may present different levels in cognitive demand from formal assessment guidelines, but this is poor practice. The idea is to get learners into the habit of thinking correctly, which does not actually happen in the textbook exercises. This may be worth a re-evaluation so that textbook authors and teachers can improvise in new textbooks as well as in teaching practices.

8.5 The research answers

In order to answer the research questions, I re-present the questions in order to clarify how each is answered:

8.5.1 The critical question of this research is:

- To what extent do a range of graded CAPS compliant history textbooks reflect progression in historical thinking through different phases in school history?

Further sub-questions defining the parameters of the research are:

- What kinds of substantive and procedural concepts of knowledge are foregrounded in a range of current history textbooks?
- How do these texts represent shifts or progression in the disciplinary concepts over three phases in the South African history curriculum?

The objective of this investigation was to determine the extent to which a range of graded CAPS-compliant history textbooks reflect progression in historical thinking through the different phases of school history. Since historical thinking involves the advancement in both substantive and procedural dimensions, I identified key categories that would show shifts in them. Focusing on what kinds of substantive knowledge and procedural concepts of knowledge were foregrounded in the textbooks would give me a good idea of how each shifted in individual grades and across the grade continuum. The sampled textbooks took incremental steps of various gradations in both types of knowledge to show progression. These progressive nonlinear movements are governed by certain principles.

In so far as the substantive dimension is concerned, the initial qualitative analysis operationalised the concepts of time and space to investigate progression. Increase in both time and space was signalled by the principle of chronology. Institutionalisation of the texts show that there is greater focus on information in the Expressive Domain, indicating that there is still much focus on substantive knowledge with inadequate attention to the procedural.

Using Maton's concepts of semantic gravity and density, I described how the substantive knowledge shows movement from concrete, simple knowledge to abstract, complex knowledge. In earlier grades the substantive knowledge is strongly contextualised and progresses to the higher grades where it becomes strongly decontextualised and universal. I also used nominalisation to describe how the substantive knowledge presented nontechnical and everyday language in earlier texts, becoming replaced with technical and academic language that is formal and highly nominalised.

Reading and writing production in textbooks is influenced by the structuring of genres and the purpose of writing. For this purpose, I used the genre approach of SFL to

investigate how textbooks advance in the presentation of knowledge. I found that genres are presented according to a typology, from autobiographical to biographical, and then to interpretation and argumentative genres, demanding greater length of dense, compacted texts with abstract concepts and strongly specialised vocabulary. I also used the genre level of analysis to extract new concepts and found that textbooks present increasingly new substantive knowledge. This level of analysis also indicated a build-up of generic skills.

The tasks analysed show varying degrees of cognitive demand which are not aligned with the policy of CAPS. Whilst progression in the procedural knowledge in the form of the six second-order concepts is indicated across all texts, they stagger on their introduction in earlier grades, but eventually become rooted in all the texts. The degree of their usage is not measurable by this analysis, considering its abstract description and nature. The historical source inquiry shows that insufficient sources are available to earlier grades and, if they are, they are not appropriately acknowledged and labelled as a 'source' and are not considered in this category of analysis. Higher grades do, however, show increasing interaction with a greater number of sources, but only Grade 9 does so in a disciplinary manner.

Drawing the conceptual frame and the sociology of knowledge together, the structure of historical knowledge is shown to progress both vertically (in the substantive dimension indicated by principles of genre advancement, conceptual demand, cognitive levels, higher level skills, contextualised and decontextualised knowledge) and horizontally (nonlinear benchmark progression by display of historical significance, use of primary source evidence, ability to identify continuity and change, analyse cause and consequence, take a historical perspective and to understand the moral dimension of historical interpretation.). Genre is key in tracking progression in both vertical and horizontal growth in historical knowledge.

8.6 Conclusion

This chapter brings together all analyses to get a complete look at the data and how it answers the questions of the research. I first described the objective of each level of analysis and then discussed the findings for each. I then described the objectives of the investigation and showed how I used various tools to identify shifts in the

substantive and procedural dimensions of knowledge. By showing and describing the shifts in these two dimensions, I answered the research questions. The function of this chapter was to bring the findings together to view what is said about how the two dimensions of historical knowledge show progression in historical thinking.

CHAPTER 9

THE FINAL TAKE

9.1 Introduction

The purpose of this final chapter is to synthesise the thesis with some concluding remarks and personal reflections on the results, the analysis, the methodology and the overall significance and relevance of the study. In research, there is always the rhetorical question: What is the purpose of any study? Apart from the driving force that catapults one in the search of personal answers to dilemmas, there must be a ‘need’ for a study. My Master’s degree was my first research degree and this study is a quest to deepen my specialist knowledge. Pursuing history is not a task but more of a passion-driven course to strengthen my research creativity and preferences. It is expected that research studies in this field offer valuable and purposeful contributions to the existing body of knowledge in the realm of history education. This is a timely study, now that South African educators are embracing the new CAPS curriculum. That the role of the textbook is always questioned in the light of burgeoning digital technology and Internet driven tasks and information, makes this study relevant to its context. In this final chapter, I reflect on some methodological issues which can assist future researchers who use the tools operationalised in the study. I also discuss the limitations when using some of the tools and, finally, I present recommendations for future research.

9.2 Methodological issues

The identification of second-order concept prompts in texts may present a challenge to a researcher who wishes to follow this technique. According to Peck and Seixas (2008), who played a central role in the Benchmarks of Historical Thinking, a common framework, or series of second-order concepts, conceptualises historical cognition. Teachers involved with the project experienced the second-order concepts as fluid and in a state of flux. Identifying with this fluidity in my own analysis, I began to observe how the substantive dimension played out in the various levels of research. How information is ‘presented’ (substantive), with or without the use of

sources or evidence, and how the information is ‘used’ (procedural), became key signifiers of which meta-concept was being articulated.

The practical application of these concepts into teaching and assessment was construed as challenging by teachers themselves who were involved in the Benchmark Project (Peck & Seixas, 2008, p. 1024). Impediments, however, were considered surmountable in the teachers’ application of the difficult concepts. In my first level of analysis, the identification of the meta-concept at work in each chapter was equally challenging. However, I began to ‘see’ the substantive separately and tried to identify ‘how’ the substantive was being ‘used’. I also observed how the presentation of information and the kinds of activities and tasks in the textbooks stimulated pupil response. This is essentially an inferential process which involves a sequence. The first step involves a preliminary reading, which then progresses into a more critical engagement. I worked with a list of second-order concepts as criteria to be ticked off, as a procedural concept was inferred. The second-order concepts are nuanced and have a certain complexity to their nature. However, once the analysis begins and a clear framework is set up, it can be completed. This strategy once again reinforces how complex these concepts are and, rather than being clearly identifiable, they are made visible by inference.

Peck and Seixas (2008) argue that a focus on students’ progression offers a way of dealing with history in a country like Canada, which is divided by region, nation and language. I argue that the scenario is no different in South Africa. The focus shifts away from what story to tell in our history textbooks, to students understanding of how to handle different and conflicting stories of the past. Peck and Seixas (2008) also contend that different substantive history may be exercised in different regions, provided they all subscribe to assessments targeting historical thinking. In South Africa, this would also mean adhering to a multi-perspective approach commencing earlier in the school history curriculum. It would also entail teaching history explicitly for historical thinking. In Australia too, concerns about the learning of one story in history was raised in Taylor and Clark’s presentation of the Australian National History project at the Benchmark symposium. They posited that learning one story would be inadequate preparation, equating it to being “tossed into a sea of relativistic

bewilderment without a paddle” (cited in Peck & Seixas, 2008, p. 1022). It seems that the value of the substantive is strongly indicated in the development of historical thinking.

While the history of any country is politically driven, there must be an understanding that what information is presented, engages learners to think historically. This methodology places significant emphasis on historical sources and evidence. This would mean that textbooks, driving a multi-perspective approach, present to the learner various accounts and all surviving pieces of evidence, even the ones presenting ‘older’ versions of history. My study shows that the multi-perspectivity is not well developed in this sample of textbooks. The actual interrogation of sources on issues of reliability and credibility only commence in Grade 9. This is unfortunate, given that only about 20% of learners proceed to select history in Grade 10 (based on the figures from the 2013 National Diagnostic Report that 109 046 wrote the Grade 12 history examinations in 2013 of a total of 562 120 full time candidates). It means that the majority of South African learners who do not study history beyond Grade 9, are not developing a deep understanding of history as a discipline which requires one to see a range of perspectives.

To induct learners into the speciality of history, textbooks and the curriculum are engaging with key events in South African history within the sampled textbooks. The interconnectedness of these events is also depicted in a chronological manner, even though this is done later rather than earlier in the school history curriculum. This study did not include the analysis of Grades 10–12 textbooks in the sample, so it is uncertain whether the chronological trend, commencing in Grade 6, continues to the exit phase of the school curriculum. However, at the Department of Education (Province of KwaZulu-Natal) colloquium (2015), educators of Grades 10–12 history indicated that this history was not chronological and focused on world history, including China, rather than only South Africa. Some of them argued that African history was remotely represented even though Africa had a rich, pertinent history. Others argued that South African history featured weakly in Grades 10–12 history. It is possible that they were not aware that the story of the history of South Africa is already told in the earlier phases of the curriculum. I was in the position to recognise

that the stories that Grades 10–12 learners are constructing are the different interpretations and perspectives of people at different times in *different countries*. This is a contestable history of people in a different ‘space’ and ‘context’ from the learners in a South African context. If learners in South Africa present weak conceptions of how their own South African history can be considered contestable, it could be because they are not mature enough at the Intermediate Phase to recognise the contestable nature of their significant past. The other argument is that South African history is presented to younger learners without giving them much to contest or think about. This raises questions on historical enquiry in earlier years of school history.

9.2.1 Reflections on the analysis methods

The first step, involving a qualitative analysis, was very informative and illuminating, and I would recommend that any researcher intending to use content analysis as a methodology also engages with this initial approach. It was very useful in carving a pathway forward, as it helped formulate concept maps and detailed notes of observations which could be recorded. These maps and notes not only made sense later when the whole picture emerged, but were also used to document data, very much like field notes. Once similarities and differences are identified and patterns and categories noted, only then can it be detailed how to progress with each individual category of analysis. Whilst the methodology is neatly worked and presented on diagrams in earlier chapters, the actual work was very much a ‘nonlinear’ or ‘cyclical’ process. I found myself returning to the starting point of the study, very often to my field notes and observations, to check on development, coherence and alignment. The study operationalised an inductive-deductive reasoning which involved moving back and forth between what was observed and made sense of, to the implications that could be drawn from observations. I would return to the implications and attempt to drive a synergy of understanding from further analyses. Each of the tools used in the study can be applied to any study singularly, but in this study they are used in collaboration, which makes it protracted and in-depth, requiring significant time and effort to execute. It is equally important to understand the concepts and theories before they are engaged with in the study. The data is detailed and highly textured, pointing to different yet tentative facets of progression.

In this study I decided to code 'sources' separately from 'generic sources' of information. Although it was a calculated strategy to maintain order and structure, it could constitute a limitation. This limitation was encountered when I could not distinguish clearly the number of primary sources from the secondary sources. Since textbooks do not follow a consistent system of labelling and captioning of their sources, I had to find a way to interrogate how their sources are used. I chose to code and analyse those sources that are labelled as a 'source'. Yet, in the process, I observed what appeared to be a primary source without a label. I analysed it as a 'generic source of information'. In my opinion, it was still coded, using the tool of institutionalisation.

I found that the tool of institutionalisation was appropriate to denote how knowledge could be categorised into different domains. I applied it to textbook content to show knowledge specialisation in textbooks. Bertram (2012) argues that developing a historical gaze is viewed as a gateway to sophisticated knowledge structures and thinking. She adds that teacher awareness of where knowledge could be placed in the domains could result in them consciously adopting certain teaching strategies so that it moves towards the specialist domain, thereby creating the historical gaze. The results of this study show that the knowledge in textbooks is not entirely in the specialist domain, but that strategized teaching could move it into the desirable domain.

A challenge of using the tool of institutionalisation arose when headings, sub-headings and word banks had to be coded. To ascertain how words could be tied to procedural knowledge involved interrogating the text to find where they are located. Then I had to gauge how they are used in the context of the sentence or paragraph and if they are used in any specialised way. The second limitation of the institutionalisation tool also placed a challenge on the coder to determine whether the language is specialised. Here, there are instances when the text is explicitly teaching a particularly historical content, but is using simple words to carry the meaning in order to make it accessible for the learner. This is where a second coder was necessary to analyse the same content. However, this would have been time-consuming and costly, especially when a study is multi-levelled and intensive. This kind of work would require a second coder from history education who is also familiar with the concepts and research. The knowledge on research would also have to be inter-disciplinary, as this study is constructed on

theory from multiple disciplines. I accept, however, that in research there is always the issue of coder variability, and that is why I located my ontological view of knowledge in critical realism. This view of the world recognises that the social world exists independently and that our knowledge of the world will always be fallible. I acknowledge the limits of what can be done. For this investigation, I used conceptual tools to make certain judgements. While there are theories to choose from, even though they may be fallible, at least they present some approximation of the truth (Wheelahan, 2010, p. 71). While some categorisations of data can be contested, I have presented a detailed language of description to support the coding.

The use of Bloom's taxonomy in this study was useful in allowing me insight into the levels at which textbooks present their activities. Wineburg & Schneider (2010), argue that knowledge in history is built differently from other subjects and object to its placement at the bottom of the pyramid. Understandably history is different and concerns are genuine. However, in the absence of an alternative framework to gauge cognitive demand, Bloom's taxonomy seemed the obvious choice. Again, it may be argued that using an alternate framework could in all possibility give a range of diverse descriptions of how tasks are engaged with. However, there was a choice that to be made and in spite of the taxonomy having a generic nature, it nevertheless made an important contribution to understanding the advancement of thinking within textbooks. While the epistemic cognition alluded to by Maggioni et al. (2009) may be worth considering for future study, it is not a well-supported model of progression in South Africa. Bloom's taxonomy continues to be used to analyse tasks, tests and textbooks.

9.3 Recommendations for review of textbooks

Although the results of this investigation cannot be generalised to the wider population of textbooks in use in schools, the descriptions of data in the various chapters under study reflect important trends and patterns. Whilst the sample may be restricted to seven across the phases, there are observations of general practises in textbooks which need further investigation. Perhaps studies including more textbooks, and involving whole-chapter analyses may be more comprehensive. A study that encompasses investigation of the entire corpus across all phases in the school curriculum would yield more conclusive results. It is, however, recommended that further research be pursued

in the area of history text analysis. I would also recommend that the textbooks of other countries be analysed to understand their methods of provenance in textbooks.

From the analysis, it emerged that there is a lack of adequate provenance of sources in some of the textbooks in the sample. It is recommended that textbooks incorporate a well defined methodology to contextualise the sources, distinguish between primary and secondary sources and ensure that they are well referenced. It is also recommended that those appearing on the department list of approved textbooks, follow guidelines with regard to the contextualisation of sources.

The fact that multi-perspectivity is weakly represented in this sample of textbooks has concerns for history enquiry in school history textbooks. More attention should be focused on how sources are used, how well defined they are, that learners understand their nature and classification, and that there is explicit teaching of source interrogation. Textbooks should not only present the sources for analysis, but should also include the process of teaching how sources can be used to detect bias. A standard format for referencing source material as well as methods to interrogate reliability and credibility should be established. Textbooks should also be required to submit their references in their own reference section so that learners can learn the academic standards which they, too, are required to follow when they present tasks and projects. Provenance is a necessary part of history teaching if procedural skills are to be developed. In a similar vein, when textbooks manufacture or create sources to depict the past, like the photograph of trekboers, they need to caption these appropriately to indicate that the picture is a re-creation, or that it is staged to provide visuals of the past.

Textbooks have also failed to provide learners with adequate details on the terminology of BCE and AD. They normally define the acronym in a word bank, but this is insufficient for young learners to get a sense of how important this is in understanding chronology. Learners will find it difficult to place themselves in a framework of chronology if these concepts are not explicitly taught or understood. Considering that learners are also from different backgrounds and cultures, and the curriculum is said to be respectful of diverse beliefs, the concepts of BCE and AD are related to the birth of

Christ, which should be recognised and taught while being respectful of different beliefs.

The findings of this study are also important to teachers by raising their awareness of textbooks presentations. They can adopt teaching stances that can foster historical thinking by instructing learners in the heuristics of historical investigation. Maggioni et al. (2009) argue that teachers who are trained to use the tenets of the discipline can make pedagogical choices to foster learning.

The findings of this study also indicate increasing abstraction and nominalisation in texts, which places challenges on second-language learners who may battle with both concepts and the language which textbooks are written in. Textbook authors, publishers and writers can also make choices that would benefit learners in acquiring the common-sense language of history so that they may write interpretations and explanations in history. More research is required in ascertaining how many of the learners who actually study history in matric, or are actually second-language learners, understand and access semantically dense concepts.

It also emerges from this investigation that the genre approach in history is strongly presented in textbooks. It is an approach that can be used to teach structure in learners' writing in history, developing ideas of chronology and the order of events. It is recommended that educators of history explicitly teach the structure of texts and documents so that pupils who read them become acquainted with the formats in print and they will then be able to reproduce them.

9.4 Key insights from the study

Very much like how a story has its elements or parts, namely, the characters, the plot, setting, theme, climax and an order of events, so too does history. The story has elements that can be described separately but are interrelated, vital structures that make up its natural shape or contour. In history, the substantive knowledge is the facts or the content of history, but its structural shape is defined by its second-order concepts. In a story, none of the elements can go before the other because they operate in tandem and history is no different. The results of this study show that while the second-order

concepts are to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take a historical perspective and understand the moral dimension of historical, and can be described separately, they operate in collaboration. It is their common, unitary purpose which is a nonlinear conceptual mastery that is reflected in progression.

Older learners may have more experience and skills and may have assimilated more concepts through greater opportunities for learning. They may have an extended knowledge base which can, in turn, afford them greater explanatory powers. Therefore, the higher graded textbooks afford them more challenges in writing and reading opportunities. While learning activities can be sequenced and structured according to age and level appropriateness, learners follow different routes to learning. How a text unpacks the history for the learner depends on its own power to present the order or range of procedural or second-order concepts (which is not overt) and the learner's ability to rise to the challenge. Cooper (2015, no page number) argues that it is important for primary school children to learn history from the beginning and in increasingly complex ways through the processes of historical enquiry, and teachers can best accelerate pupils' thinking by engaging them in creative activities. I argue that when the textbooks place these activities creatively, they reduce the task of the teacher to locate powerful material. It is that the material requires a great deal of thought and strategy before its placement in textbooks. The power and significance of the history textbook is once again reinforced. The range and growth of content knowledge within the texts is clear. It is how a text engages the learner in a structured thinking process which encourages the learner to think in particular ways that distinguishes one text from another. Learners can be taught to fashion their own writing from how they see it in operation within the text. Is it engaging, rich in material, does it have evidence to make claims about, does it have sources that can be contested, does it allow the learner to be transported in time, does it have enough visual material and textual material that will challenge and fascinate learners?

What is also clear is that there is no operative model or a structured learning process of second-order concepts. There is no hierarchical order in which they are expected to be learned. The findings resonate with Counsell's (2011, p. 4) elucidation that "any effort

to represent and assess conceptual development hierarchically is profoundly problematic”. Textbooks themselves structure and order information which may follow a chronological (real time) pattern and, within the chapters, may also structure (text time) background, events, causes and outcomes. This nonlinear conceptual mastery may take place at any stage of learning within a grade or across a curriculum. Findings show that there is both vertical and horizontal construction in the structure of history knowledge. These results confirm Cooper’s (2015, no page number) conclusion that “no robust, sophisticated pattern of progression has been formed, and arguably never will be, given the variables involved”.

9.5 Conclusion

In this chapter, I have made an overarching assessment to determine whether the research questions have been answered by the methodology. I also considered the value of the methodology I have engaged with in the thesis. I have described some of the limitations of the study and the tools I used. I have also engaged with areas I think textbooks need to critically consider in the future. I have presented some recommendations for both textbooks and research as far as the use of sources is concerned. Finally, I have ended the thesis with some of my own insights.

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APPENDIX A

Institutionalisation of knowledge statements

Recording Sheet: GRADE (3, 4, 5, 6, 7, 8, 9)

(Circle appropriate grade)

Unit of Analysis: Knowledge Statement (Colour-code: paragraph, heading, introductory explanation, word bank, pictures, cartoons, drawings, photographs, maps, case studies)

There will be seven such coding sheets for each grade.

HISTORY CONTENT:		TOPIC COVERED IN GRADE ____		
KNOWLEDGE STATEMENT eg. KS 1, KS 2	INSTITUTIONALISATION ESOTERIC (content clearly historical, language specialised, specialised procedural knowledge) : I+ I+	INSTITUTIONALISATION DESCRIPTIVE (content knowledge not specialised to history, located in everyday knowledge, language unspecialised, specialised procedural knowledge) I+ I-	INSTITUTIONALISATION EXPRESSIVE (content clearly historical, language specialised but generic procedural knowledge) I- I+	INSTITUTIONALISATION PUBLIC (content knowledge not specialised to history, located in everyday, language unspecialised, generic procedural knowledge) I- I-
KS 1				
KS 2				
KS 3				
KS 4				
TOTAL NO.KS:	%	%	%	%

APPENDIX B

Use of Sources

Recording Sheet: GRADE (3, 4, 5, 6, 7, 8, 9)

(Circle appropriate grade)

Unit of analysis: Source

There will be seven such coding sheets for each grade.

Number of source	HISTORICAL SOURCES AND OPPORTUNITES FOR INTERPRETIVE WORK							
	EXAMPLE OF SOURCE USED IN TEXT EG. INTERVIEW, CASE STUDY	SKILLS TO BE ACQUIRED: Generic /Specialised	List Development of historical perspective/moral perspective/use of evidence	Meta-concept: of	Esoteric Domain	Expressive Domain	Descriptive Domain	Public Domain
S 1								
S 2								
S 3								
S 4								
Total Number of Sources					%	%	%	%

APPENDIX C

Cognitive Demand

Recording Sheet: GRADE (3, 4, 5, 6, 7, 8, 9)

(Circle appropriate grade)

Unit of analysis: Task

There will be seven such coding sheets for each grade.

Number of Task	COGNITIVE DEMAND					
	Level 1 Remember	Level 2 Understand	Level 3 Apply	Level 4 Analyse	Level 5 Evaluate	Level 6 Create
T1						
T2						
T3						
T4						
T5						
T6						
Total Number of Tasks	%	%	%	%	%	%

APPENDIX D

Ethical Clearance



2 December 2015

Ms Pranitha Bharath 208525444
School of Education
Edgewood Campus

Dear Ms Bharath

Protocol reference number: HSS/0423/015D

Project title: An investigation into how Social Science textbooks develop progression in historical thinking.

Full Approval – No Risk / Exempt Application

In response to your application received on 27 April 2015, the Humanities & Social Sciences Research Ethics Committee has considered the abovementioned application and the protocol have been granted **FULL APPROVAL**.

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment/modification prior to its implementation. In case you have further queries, please quote the above reference number.

PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for a period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

Dr Shamila Naidoo
On behalf of Dr Shenuka Singh (Chair)

/pm

Cc Supervisor: Dr CA Bertram
Cc Academic Leader Research: Professor P Morojele
Cc School Administrator: Ms Tyser Khumalo

Humanities & Social Sciences Research Ethics Committee

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Website: www.ukzn.ac.za



Founding Campuses ■ Edgewood ■ Howard College ■ Medical School ■ Pietermaritzburg ■ Westville

APPENDIX E

Turnitin report

Bharath final PhD

ORIGINALITY REPORT

7 %	7 %	2 %	2 %
SIMILARITY INDEX	INTERNET SOURCES	PUBLICATIONS	STUDENT PAPERS

PRIMARY SOURCES

1	www.education.gov.za Internet Source	2 %
2	oro.open.ac.uk Internet Source	1 %
3	www.thinkingcaps.co.za Internet Source	<1 %
4	www.historyitt.org.uk Internet Source	<1 %
5	centres.exeter.ac.uk Internet Source	<1 %
6	www.ukzn.ac.za Internet Source	<1 %
7	www.ccsd.k12.co.us Internet Source	<1 %
8	www.dartmouth.edu Internet Source	<1 %
9	www.naldic.org.uk Internet Source	<1 %
10	education.ukzn.ac.za Internet Source	<1 %