

**HOW DOES HISTORICAL LITERACY  
MANIFEST ITSELF IN SOUTH AFRICAN  
GRADE 10 HISTORY TEXTBOOKS?**

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GRADE 10 HISTORY TEXTBOOKS?**

**By**

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for the degree of Master of Education.**

**February 2010**

## Supervisor's Declaration

"As the candidate's Supervisor I agree to the submission of this dissertation."

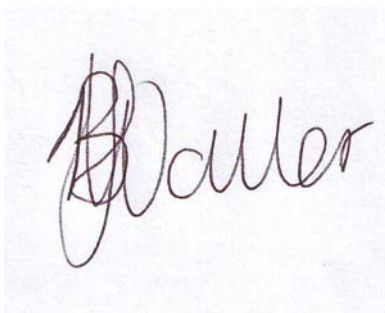
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## DEDICATION

This thesis is dedicated to my loving and supportive husband, Bruce Waller.

## **ACKNOWLEDGEMENTS**

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- I humbly acknowledge and thank, Professor Johan Wassermann, for the priceless insight, constant encouragement and patience he afforded me during this process. Furthermore, under his guidance, I was able to grow as person, academic and a professional.
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## ABSTRACT

The aim of this study was to identify how historical literacy manifested itself in Grade 10 history textbooks. The use of two distinct time periods was used in my study to chart the changes in history education, in South Africa. Pre-1994 detailed the nature of history education and history textbooks during the times of the Boer and British Republics to apartheid era history education. Post-1994, on the other hand, depicted the change, or lack thereof, of history education and history textbooks from the 1994 democratic elections to its current state. Despite the changes in history education between the two eras, the use of history textbooks was, in the context of this study, the vehicle to deliver the curriculum.

In the light of the progression of history education and its link to history textbooks, the purpose of this study was threefold, which was purported through the use of three research questions, namely to firstly ascertain what kind of historical literacy was envisaged by the NCS – history. Secondly, to examine the views of history textbook authors concerning their opinion of school history (historical literacy). Thereafter, it was imperative to analyse Grade 10 textbooks in order to ascertain how historical literacy manifested itself therein so as to satiate the question of the thesis.

My data sources were the National Curriculum Statement for history (2003), Grade 10 history textbook authors and three Grade 10 history textbooks. The methodology was qualitative and informed by an interpretivist approach. Open coding and Fairclough's (2005) analytic instrument for discourse analysis was applied to data. Thereafter, a deeper conceptual understanding of historical literacy was engendered through the use of the Toolkit for Historical Literacy.

Historical literacy is a complex process wherein a number of criteria facilitated the concept. Attainment of these factors of historical literacy would ensure mastery of the discipline. Historical literacy comprised of historical content knowledge which was a balance between knowing information as well understanding the past. Multiple sources, together with historical skills and

historical concepts were vital for historical literacy to construct and evaluate knowledge. In addition, historical literacy furthered a case for developing a moral and ethical framework wherein the past could be judged. Historical consciousness, born of historical literacy, allowed for learners to make a connection with the past. Furthermore, historical literacy encompasses a number of modern concepts for the case of historical literacy, namely ICT-understandings and representational expression. Therefore, historical literacy should be multi-disciplinary and multi-dimensional.

The findings of this study were numerous. Historical skills, historical concepts, understanding and knowing the past, moral judgements in history and a source-based methodology was the encompassing form of historical literacy from the Grade 10 history textbook authors. At the core of historical literacy in Grade 10 history textbooks, are the role of the historian and the political influence of the NCS - history. The NCS - history endorsed all history textbooks in South Africa. The Grade 10 history textbooks revealed a potentially alarming factor for the case of historical literacy. The historical literacy advocated by the Grade 10 history textbooks is a far cry from the international version of historical literacy. No modern features of historical literacy were represented (ICT-understandings, representational expression, applied science, contention and contestability and historical consciousness). Moreover, more traditional features of historical concepts of change, cause and effect as well a means of morally judging the past through empathy are missing or not appropriately dealt with. Historical literacy in Grade 10 history textbooks is functional in terms of sourcing, contextualising and corroborating information so as to understand an event rather than know it. Historical skills are needed to complete this process.

Ultimately, the type of historical literacy found in Grade 10 history textbooks is reminiscent of the Schools History Project. Historical literacy in South African Grade 10 history textbooks is not evolving or dynamic and it does not meet the requirements of the international version of historical literacy. However, it does partially satisfy the NCS - history requirements for historical literacy.

## ACRONYMS

ANC	African National Congress
AS	Assessment Standard
CNE	Christian National Education
DoE	Department of Education
FET	Further Education and Training
HSRC	Human and Social Research Council
LO	Learning Outcome
LPGS	Learning Programme Guidelines
NCS	National Curriculum Statement
NP	National Party
OBE	Outcomes Based Education
RSA	Republic of South Africa
SHP	Schools History Project
SAHP	South African History Project
UK	United Kingdom

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## CHAPTER ONE

### SETTING THE SCENE FOR THE ANALYSIS OF HISTORICAL LITERACY IN GRADE 10 SOUTH AFRICAN HISTORY TEXTBOOKS

#### 1.1 Introduction to the study

The study of history in South African schools has changed dramatically since 1994. The benchmark of 1994 is used throughout this thesis as a distinct time marker whereafter South Africa officially became democratic as opposed to pre-1994 where much inequality and discrimination were experienced. Moreover, the time-periods of pre-1994 and post-1994 are used to analyse the nature of history education and the use of textbooks as the necessary background to this study. The focus of this study is to deal with historical literacy and history textbooks. Furthermore, the aim of the study is to ascertain how historical manifests itself in Grade 10 South African history textbooks.

History education has attempted to move, since 1994, from a predominantly teacher-centred methodology characterised by “chalk and talk” to a more learner-centred practice, which is underpinned by skills-based activities. To reinforce this paradigm shift in history education, the nature, ideology and content of the history curriculum had to be radically altered. For many years during the pre-1994 period, curricula and textbooks were determined and dominated by a minority grouping of Afrikaner historians. Most glaringly obvious, during this period, was the fact that within historical resources, history classrooms and society in general, there was little to no historical debate (Siebörger, 2000). As a reaction to this and as a means of rectifying this narrowed curriculum, a new curriculum underpinned by the notion of Outcomes Based Education (OBE) was developed post-1994. OBE, as a

definitive curriculum methodology, was a radical paradigm shift away from the nature of education as advocated pre-1994 to that of an envisaged explicitly inclusive and holistic education. OBE is facilitated by the National Curriculum Statement (NCS) for Grades 10-12 (General) for History (NCS - history) (2003), which describes subject-specific requirements for each discipline. Mason (1999) asserted the major role and function of the NCS - history was an attempt to measure what learners can do as a result of their acquired knowledge, skills, values and competencies in order to participate fully in the global economy. This process of educational transformation also extended to the NCS - history.

However, regardless of the nature of education pre-1994 and post-1994, history curricula and history textbooks remained the driving force of the appropriate educational ideology. By their nature, history textbooks, according to Engelbrecht (2006), tend to control knowledge as well as transmit it, and at the same time reinforce selected cultural values in learners. In addition to a history textbook's function concerning the transmission of knowledge, it also fulfilled the function of "anchoring the political and social norms of a society" (Schissler, as cited by Pingel, 1999, p. 7). Ultimately, history textbooks act as an officially sanctioned version of knowledge and culture and, consequently, have the power to foster judgmental perspectives, and in the context of this study a certain kind of historical literacy. Despite the changes, pre- and post-1994, the history curriculum, mindset and methodologies are purported in history textbooks.

Consequently, the focus of this study is located in the functional realm centred on history textbooks and historical literacy. In this study I will be ascertaining what kind of historical literacy manifests itself in Grade 10 history textbooks. Furthermore, the specific focus of this study is to view how historical literacy is envisioned in South African Grade 10 history textbooks. The overview of the landscape of history textbooks in South Africa will be interrogated in

Chapter 2. The concept of historical literacy and its variety of internationally associated meanings will be thoroughly reviewed in Chapter 3.

This thesis was located in the field of history education while historical literacy served as the theoretical framework for my study. When researching, an interpretivist paradigm was employed by reviewing data and literature pertaining to historical literacy and history textbooks as well as analysing the said data and linking said findings to the literature. The methodologies of discourse analysis and open coding were used to analyse my data. In order to establish a deeper, theoretical meaning of historical literacy, the Toolkit for Historical Literacy was used to interrogate the findings of the open coding and Fairclough's (2003) analytic instrument.

The process of analysis of the samples was three-fold. Firstly, I needed to establish what kind of historical literacy the history textbook authors espoused. In order to do that, a glimpse into their world, in the form of the NCS - history had to be reviewed to understand the context wherein history textbook authors function. Secondly, it was vital to review what the purpose of school history was – in other words to identify what kind of historical literacy history textbook authors subscribe to. The final means of analysis was to ascertain what form of historical literacy was envisioned for Grade 10 history textbooks and the manner in which it manifested itself.

In the light of the progression of history education and its link to history textbooks, the overall purpose of this Master's thesis is informed by three research questions:

1. What kind of historical literacy is envisioned by the NCS - history?
2. What do textbook authors of the Grade 10 history textbooks view the purpose of school history to be?

3. What kind of historical literacy is espoused by the Grade 10 history textbooks?

## **1.2 Background to the study**

History education, in South Africa, can be divided into two distinct time periods, namely pre-1994 and post-1994. For the purpose of this thesis the pre-1994 period dealt with history education during the apartheid era, whilst the post-1994 era dealt with the changes in history education after apartheid had ended. Operating concurrently within the realm of history education across these two periods was the vehicle for the delivery of the curriculum, namely history textbooks.

The purpose of history education during apartheid was to ensure the dominance of Afrikaner ideology and to establish and maintain political, social and economic segregation (Siebörger, 2000; Polokow-Suransky, 2002; Engelbrecht, 2006; Chisholm; 2007). Segregation was integral to the National Party's (NP) means of control and subjection. Moreover, education was an essential tool to ensure white supremacy. Education, including history education, was "Christian-National" in character (Dean & Siebörger, 1995, p. 32). Msila (2007, p. 146) highlighted the purpose of apartheid education: "Under apartheid education, schools were divided according to race, and education enhanced the divisions in society. These racial divisions reinforced the inequalities of a divided society." History education was politically-motivated to satisfy government demands.

The content regarding history education was specifically chosen to further Afrikaner Nationalist ideals. Consequently, history was manipulated to justify the government's values. All pupils, namely African, white, Indian and

coloured were made to study the same content, however foreign it was to them or inappropriate to their background. Stolten (2003) argued that history education of the pre-1994 period denied black<sup>1</sup> South Africans their own history. The history learned in schools attempted to foster and promote a certain identity so as to purport a sense of superiority for whites and inferiority for blacks. Ultimately, history education, at this time, was a political and ideological tool used to suppress the masses in order to empower the white minority.

The history of white education and history curricula could be, according to Dean (1983), categorised by three factors. Firstly, the role of the church was instrumental in ensuring segregation. Secondly, language (English and Afrikaans) was synonymous with power and finally the Afrikaner Nationalist ideology guaranteed separate development. Bertram (2009) described the role the history curriculum played during apartheid as being one-sided and biased in favour of all the positive aspects of Afrikaner history which was transferred and infused within textbooks.

Taking into consideration that the history textbook was the vehicle for the curriculum to be realised, it was vital to ascertain the nature of history textbooks from 1948 to 1994 to lay a foundation for this study. Just as history education pre-1994 suppressed certain skills, knowledge and values in favour of a narrowed NP version, so too was this discrimination evident in the history textbooks. History textbooks were characterised by illustrating and exaggerating the differences between races in order to justify the actions and dominance of the white minority government. In a seminal research work on history textbooks conducted towards the end of apartheid, Chernis (1989) illustrated the role of history teaching with regard to national and historical consciousness from 1839-1989. Chernis (1989) viewed the functions of

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<sup>1</sup> In the context of this thesis, the term "black" is used to represent Africans, coloureds and Indians, collectively, as much of the available research coins the term "black".

history teaching from 1839-1989 for purposes of identity-formation, legitimisation of political aspirations as well as religious aspiration and for orientation of segregation, discrimination and entrenching the notion of white superiority. According to him, pre-apartheid history textbooks were characterised as being segregated in terms of provinces. In turn, this provincial segregation ensured that textbooks served the social, economic and political aspirations of each province which can be largely grouped as either being pro-Afrikaner or pro-British. Overall, history textbooks promoted either Afrikaner or British aspirations for each province and were mostly emotive and biased in many regards.

Furthermore, Engelbrecht (2008, pp. 519-520) described the nature of apartheid textbooks as a “clear example of ideological and political influence [which inculcated the] Afrikaner-centred European perspective in history books that during the Apartheid era promoted the positive influence of whites and omitted blacks.” Similarly, Chisholm (2007, p.1) affirmed the role textbooks played prior to 1994 as a means of legitimating apartheid and the construction of “the other”. Overall, history textbooks from 1948-1994 were biased with the intent of indoctrinating the schooling populace. In the same way, history textbooks furthered and mirrored the goals of the NP. The historical literacy, pre-1994, was therefore broadly speaking one of rote-learning and the unquestioning acceptance of history as an agreed-upon story or meta-narrative of white supremacy.

However, further afield The School’s History Project (SHP), in 1972, changed the teaching of history in United Kingdom (UK) schools which in turn spread internationally. The SHP was “... designed to encourage understanding of the nature of history and its fundamental concepts” (Hayden *et al.*, 2001, p. 21). Proponents of the SHP furthered that this new alternative paradigm for history teaching not only allowed learners the opportunity to be exposed to content but also the tools and skills with which to evaluate and critique historical



knowledge. This new “version” of school history proposed a new form of historical literacy which valued historical skills and historical knowledge. However, the emphasis of being able to do history was purported more than to know history. On the other hand, critics of the SHP commented that the SHP sacrificed content knowledge in the process.

The SHP also started affecting South Africa and during the latter years of apartheid a number of people, institutions and educationists began to interrogate and investigate the point and role of history education in light of the changing situation in South Africa. Agitation with the form and nature of history education resulted in debate and concern began, formally in the 1970s, and non-formal steps were taken to modify the then history curriculum. A point in case is what Kallaway (1995) stated, namely that during the 1970s, alternative approaches to school history in South Africa were explored, which included interrogating the use of new materials, the practice of skills-based evaluation and the possibility of implementing alternative history textbooks.

Locally, a period of transition regarding the nature of history education was experienced whilst the NP history was still in power. The Human Sciences Research Council (HSRC) investigated the nature of the teaching of history in schools in SA during 1988–1991. At the outcome of this enquiry it was decided that a new curriculum should reflect the following points: the trends of history, as a discipline, must be apparent; and should be representative of all people, regardless of race or gender. Moreover, the aim of a new type of history had to be characterised by being inclusive of a society’s past and present no matter how controversial. Lastly, learners should be imparted with historical and analytical skills with which to make meaning of historical events and sources (Kallaway, 1995). These steps to redressing the past were in direct conflict with history education under the apartheid regime, being experienced at the time, but a sign of political and global change in history education was infiltrating history education in South Africa.

With the dismantling of apartheid and the debate of what was to follow, history, as a discipline, became a focused means of how to redress the previous curriculum and its effects. Post-1994, the South African education system underwent a radical change. Baines (2003) explained the change in history education as a battle of challenging old narratives and establishing new collective narratives in order to build a new identity. This notion of change in history education was an immense ideological shift as previously it was characterised by rote-learning and being too content-laden (Bertram, 2007). Moreover, the content involved was of a Christian-National character and was specifically selected to be of a divisive nature which ultimately filtered into history textbooks. Overall apartheid era history education was divisive and biased to validate the existence of a minority grouping at the expense of the majority. This notion of superiority/inferiority filtered into history textbooks which, as a result, were equally one-sided, glorifying the status quo of apartheid in the process.

Prior to the first democratic election in 1994, the nature and purpose of history education, in South Africa, has been revisited and debated at length (Dean, 1989; Kallaway, 1995; Siebörger, 2000). Aims and serious considerations and/or reflections were undertaken by history educationists and historians to reconstruct, redress and reconcile the educational injustices of the past. These measures were deemed necessary to break down remaining racism and to provide a voice to those who were previously denied one during the apartheid years. The challenges of rectifying the implemented injustices for history education were far-reaching and vast.

All of the debates and transitional discussions concerning history education culminated in the then Minister of Education, Professor Kadar Asmal, tasking a group of professional historians, educationists, concerned role-players and

teachers to compile a report concerning the nature and possible future of history education post-1994. The *Report of the History and Archaeology Panel* identified the benefits of studying the discipline of history. This report focused on the role history plays in a learner's personal development – socially, consciously and psychologically (James, 2000). The report importantly also reiterated the discipline's importance in school education,

The formal study of these crucial areas [History and Archaeology] of knowledge both nurtures a spirit of inquiry, and assists in the formation of a conscious historical consciousness, which has an essential role to play in building the dignity of human values within an informed awareness of the legacy and meaning of the past (James, 2000, p. 3).

This report was informed by international and local deliberations concerning the future of school history in South Africa, from the 1970s through to the 1990s. It took into consideration apartheid's narrow and selfish views and misuse of school history and aimed at establishing a path with which to redress the past problems in history education.

Chisholm (2007, p. 8) described the nature of the *Report of the History and Archaeology Panel* as "... neither celebratory nor nationalist in tone and content, recognising instead the provisional nature of knowledge." The *Report of the History and Archaeology Panel* promoted the paradigmatic shift from knowing history as espoused by professional historians and pertinent academics to doing history in the classroom (*Report of the History and Archaeological Panel*, 2002). Thus the intended view for history education was to personally empower learners unlike the view of apartheid history education. The emphasis of history learning post-1994 shifted from rote learning of a narrowed and exclusive perspective of content knowledge to a more active, skills-based, learner-centred interrogative methodology wherein all learners are considered equal and represented in the history curriculum. Like the SHP, the proposed historical literacy was vastly different to past history education which would necessitate the revamp of history textbooks to

echo the sentiments of the *Report of the History and Archaeology Panel* and the NCS - history.

The next progression of post-apartheid history education was the introduction of the NCS - history (2003). The NCS - history was developed by the DoE (Department of Education) and various stakeholders as a means of redressing the past history curriculum. The NCS - history, as a document, inculcated the ideas and debates as to what history education post-1994 should include in terms of content, skills and competencies. The NCS - history advocated that the DoE was conscious of the tumultuous past of the discipline and its previously manipulative role as well as its many debates. The NCS - history was the South African government's solution to the past government's means of redressing history education and an attempt to rectify the diversity in the nature of education of the past. Consequently history Education in the Further Education and Training (FET) band, Grades 10-12, attempted to adopt a holistic approach towards assessment and content and to facilitate teaching methodology and guidelines for teachers. This curriculum approach for history conflicted with the nature of syllabi during and prior to apartheid. The NCS - history elicited a more holistic advance to history education through the development of skills, competencies and appropriate content which is representative of all South Africans. This is in direct conflict with the one-sided and biased view of apartheid history education where historical content furthered the goals and aspirations of a minority race.

History, as a school discipline, post-1994, according to the DoE's Learning Programme Guidelines (LPGS) (2004, p. 7), is characterised as "the study of change and development in society over time and space." Furthermore, examining the past history, according to the NCS - history, should enable learners to understand and assess how past human action affects the present as well as the future. Thus history became an enquiry into the past. The NCS

- history FET (DoE, 2003, p. 9) illustrates the inherent conceptual shift in the focus of school history from pre-1994 to post-1994,

A study of history builds the capacity of people to make informed decisions in order to contribute constructively to society and to advance democracy. History as a vehicle of personal empowerment engenders in learners an understanding of human agency, which brings with it the knowledge that, as human beings, they have choices and that they can make the choice to change the world for the better.

The quote above encapsulated the envisioned historical literacy of the NCS - history. History, as proposed by the DoE, aimed to provide a critical understanding of the socio-economic systems and their subsequent effect on society and that historical truth comprised multi-perspectives through the NCS for history.

Despite the radical paradigmatic shift in history education and the history curriculum, teaching materials, namely history textbooks, needed to be revised and reviewed to match the new focus of history as advocated by the NCS - history.

The *Report of the History and Archaeology Panel* (2002) identified other problems concerning textbooks post-1994. Firstly, some schools were so under-resourced that they were still using apartheid textbooks. Secondly, many textbooks were of a poor standard with little to no effort regarding the portrayal of reliable sources and they offered little to no historical substance or merit. Overall, The *Report of the History and Archaeology Panel* (2002) acknowledged the problems inherent in textbook development post-1994. However, the report advocated that recognition must be given to the fact that the majority of textbooks were attempting to redress the past and acknowledge that knowledge was not fixed. In addition, textbooks post-1994 explored issues of racism, historical concepts, inclusive content and the fact

that they offered historical skills to be developed and acquired, which was not commonplace during apartheid. These goals of the *Report of the History and Archaeology Panel* were reminiscent of the SHP.

In keeping with the debates surrounding the future of history education, post-1994, history textbooks also faced a number of challenges. The post-apartheid era also faced certain dilemmas relating to history textbooks. Van Onselen, as cited in Polokow-Suransky (2002, p.3), described this history textbook debate in South Africa as “a playground for ideologues and politicians”. The relevant debates especially centred on how learners assimilated the available historical content within history textbooks. This entailed that questions were raised concerning what type of content should be included in and excluded from history textbooks and which authority should decide such matters. Furthermore, how learners should engage with the content in an educational manner became paramount. Ultimately, the challenges regarding history textbooks remained the same as pre-1994 in terms of who controlled the historical content, who decided on said content and what the history textbooks should look like. Again, the history curriculum and the history textbook become inseparable.

Post-1994 was a time for revolutionising history education in South Africa. History education moved away from what existed during apartheid in terms of ideology, methodology, curriculum and teaching materials. Yet, even with the NCS - history and its democratic and representative ideals, the fact is that history education still had a clear educational aim which ensured that it had a definite political focus. Furthermore, this focus may not be equally representative of all South Africans, which resulted in a specific slant of history. Similarly, content again is selective and determined by the “government”. Msila (2007, p. 1) is critical of any reforms to redress education policies: “The legislators or others who formulate education policies always have certain goals in mind which can be political, social or cultural in nature.”

It followed that history education is synonymous with the history curriculum and its resources, namely history textbooks.

Subsequently, the purpose of this research became apparent. This research aims to review the aspects pertaining to the current nature of historical literacy as espoused by Grade 10 history textbooks. This entails that curricula and textbooks be thoroughly analysed. This investigation is essential so as to understand the manifestation of historical literacy from the NCS - history to the textbook authors as well as the Grade 10 history textbooks themselves. The current state of history textbooks was vital to understand the landscape in which the Grade 10 history textbooks function. To satisfy the goal of my study, it was essential to review history textbooks as they become the vehicle with which to understand the materialisation of historical literacy therein.

### **1.3 Rationale and purpose of the study**

During my Honours Degree in History Education at the University of KwaZulu-Natal, I was introduced to the concept of historical literacy. This furthered my quest to understand this complex concept on both a theoretical level and a practical level. I was intrigued by the concept of historical literacy in that it may be a clue to or view into understanding the purpose of school history in South Africa. Besides the fact that the concept of historical literacy has piqued my interest, I feel it may prove to be vital in my teaching practice. Consequently, I have undertaken to peruse the concept of historical literacy in a way that simultaneously satisfies my academic aspirations and enhances my teaching practice.

As an FET history teacher, the most accessible resource is history textbooks as they are not only popular, but essential teaching tools for history teachers.

Since all of the history textbooks are created in some likeness to the NCS - history, it ensures that they are easy to follow and interrogate. Each history textbook contains the required guidelines in order to achieve the desired outcomes as expected by the DoE. Crudely speaking, textbooks are the official version of events as sanctioned by the government and should be viewed with this in mind. Bearing in mind the role history textbooks play in education, the need for me to understand history textbooks and their relationship to the NCS - history became paramount both personally and professionally. As an academic I am wondering and curious, against my professional role, about the changing landscape of history education in South Africa as well as the true nature of current history textbooks. In order to obtain a thorough view of the scene of historical literacy in Grade 10 history textbooks, the NCS - history, which is the starting block for the journey of historical literacy, needed to be briefly scrutinised to establish the engendered form or spirit of historical literacy. Thereafter, the textbook generators – the textbook authors – themselves needed to be analysed in order to view the kind of historical literacy, in this case, of Grade 10 history textbooks.

The rationale for this study is its functionality in terms of history education as it is an attempt to identify and explain the nature of historical literacy in Grade 10 history textbooks. Textbooks are the official version of history endorsed by the government. Therefore they will prove the units of analysis or a possible yardstick for me to ascertain what kind of historical literacy is manifested in the Grade 10 history textbooks. Overall, despite the changes in methodologies, mindset (pre and post-1994) and historical context and content, South Africa's official history has continued to be portrayed in textbooks. Again the rationale of this study is purposeful in terms of its practicality for me as a teacher and a quest to understand it as a researcher.

This research aims to decipher the manner in which the concept of historical literacy manifests itself in Grade 10 history textbooks. In order to fully realise



the aim of the study, it was essential to view how historical literacy manifested itself in the NCS - history and later the history textbook authors' views as to the purpose of school history in order to fully comprehend the type of historical literacy in history textbooks. The brief view of the NCS - history and the history textbook authors will be compared and/or contrasted with the internationally recognised criteria of historical literacy. By momentarily evaluating the NCS - history, Grade 10 history textbooks and the responses of authors of Grade 10 history textbooks concerning the purpose of school history with the theory of historical literacy, it will enlighten me to the kind of historical literacy inherently prescribed.

The purpose of this study is essential to the field of school history, in South Africa, as there is no other study specifically analysing the nature of historical literacy in Grade 10 South African history textbooks. The fact that textbooks are the one resource so readily used by educators, it is essential to view the type of historical literacy advocated and whether or not this is in line with the proposed DoE's idea of historical literacy and the views of the creators of the textbooks, namely the textbook authors. The functionality of the study warranted academic merit as it reviewed the one resource which is accessible and so widely used in the classroom, namely history textbooks. Overall, the study satisfied a niche in history education by exploring the silences regarding historical literacy and Grade 10 history textbooks through the following research questions:

1. What kind of historical literacy is envisioned by the NCS - history?
2. What do textbook authors of the Grade 10 history textbooks view the purpose of school history to be?
3. What kind of historical literacy is espoused by the Grade 10 history textbooks?

## **1.4 Route map of the study**

In order to present the findings appropriately, this thesis is organised into seven chapters:

### Chapter One

This chapter laid the foundation for the study by portraying the background to the study. This background analyses history education and textbooks pre-1994 (1839-1993) and post-1994 (1994 to the present). My rationale for completing the study was explored and foregrounded. In addition, the study's purpose is discussed by identifying the niche and gap regarding historical literacy and textbooks and grounding it in terms of its theoretical framework, namely historical literacy. This chapter ultimately set the scene for the remainder of the study in terms of what the thesis would look like and the route it would follow.

### Chapter Two

This chapter explored a selection of literature deemed important for review and necessary for the completion of the thesis. Literature for history textbooks, pre and post-1994, was explored as well as the incumbent nature of history education. The focus of this chapter was to provide a solid basis with which to understand the current nature of history textbooks to eventually evaluate Grade 10 history textbooks. Furthermore, this chapter explored the key sources, both local and international, pertaining to the thesis. Similarly, key theories, concepts and ideas related to the literature were explored.

### Chapter Three

Major issues and debates concerning historical literacy were evaluated throughout the literature pertaining to this chapter. The ideas of historical literacy theorists were identified and interrogated to better understand the evolving concept of historical literacy. The reason for splitting the two areas of literature, namely historical literacy and history textbooks, into two chapters, was to provide academic merit and justice to both factors. The body of knowledge for history textbooks was vital to understand the landscape of South African history textbooks, whilst the understanding of historical literacy was essential for conceptualisation of historical literacy. Furthermore, it was vital that this chapter had to be on its own as it was crucial for developing the conceptual framework and it directly informed the analytic instrument, namely the Toolkit for Historical Literacy.

#### Chapter 4

This chapter presented the methodological implications and nature of the study. Furthermore, the nature of qualitative research and an interpretivist research paradigm were explored. Justifications as to the choice of methodology were discussed as well as the inherent strengths and weaknesses of the particular methodology. Data was analysed in the brief interlude of the NCS - history and the jacket covers, prefaces and activities of the history textbooks, whilst data was generated for the history textbook authors. Open coding was the predominant form of retrieving data with the application of Fairclough's analytical instrument for discourse analysis. Furthermore, the ethical issues with regard to approaching participants were examined. An instrument, Toolkit for Historical Literacy, was used to discern the nature of historical literacy in the textbooks. Similarly, the ideas of historical literacy from the history textbook authors and the Grade 10 history textbooks were used in conjunction with the Toolkit for Historical Literacy to engender a deeper conceptual understanding of the concept.

## Chapter Five

This chapter reviewed the responses by Grade 10 history textbook authors to the question pertaining to the purpose of school history. The purpose of school history was a metaphor for historical literacy to understand the context of the environment in history textbook authors functioned in, a brief interrogation of the NCS - history was necessary to better understand the history textbook authors' responses. The history textbook authors' responses were examined by means of open coding to identify common and dissimilar opinions. After the application of open coding, the history textbook authors' responses were compared with the Toolkit for Historical Literacy to establish a conceptual understanding of the inherent historical literacy.

## Chapter Six

This chapter was the culmination of the data from the NCS - history and the ideas from the authors. Furthermore, this chapter was the final factor in the process of evaluating historical literacy after the NCS - history and history textbook authors' versions of historical literacy. This chapter traced the developments of historical literacy. The jacket cover, preface and the purposive choice of activities were used to better understand how historical literacy manifested itself. Moreover, the activities provided an opportunity to test and measure whether the promises of historical literacy were evident. Data from the Grade 10 history textbooks was analysed using open coding and discourse analysis for the jacket cover and the preface. This data was then used in conjunction with the Toolkit for Historical Literacy to establish a theoretical understanding of the type of historical literacy.

## Chapter Seven

This chapter provided a conclusion to the study. It reiterated the purpose, rationale and background of the study. In addition, the methodology was

discussed. The discussions and findings were detailed and concluded. Furthermore, limitations of the study and recommendations were purported as well as implications of further study. The conclusion to this study illustrated the thesis' inherent value for society and a final comment about how historical literacy is manifested in South African Grade 10 history textbooks.

## **CHAPTER 2**

# HISTORY TEXTBOOK RESEARCH AND METHODOLOGIES: A REVIEW OF THE LITERATURE

## 2.1 Introduction

The literature review is a vital component of any research as it is the vehicle for the study. Hart (1998, p. 172) assessed the literature review's instrumental function in research as "... demonstrating that all of the main concepts, theories, theorists and methodological approaches relevant to the topic have been identified, understood and critically evaluated." The review of literature pertaining to this study was essential to understand the available, appropriate and relevant theories relating to the concept of historical literacy as well as history textbooks.

When examining the existing literature; the key theories, local and international views, concepts and ideas were reviewed as well as the pertinent issues and debates surrounding both history textbooks and historical literacy. Once the available literature had been carefully considered, this study's purpose could be grounded and resolved. Furthermore, the identified gaps and silences regarding the literature could be identified and accounted for.

The entire literature review was divided into two distinct chapters, namely Chapter 2 and Chapter 3. This decision was taken after careful consideration, as the theoretical commentary was too large to do it justice in one combined immense chapter only. The field of history textbook research was detailed, vast and complex and to provide integrity to my Master's by full thesis, I chose to fully explore history textbooks in Chapter 2. Furthermore, the literature pertaining to historical literacy was crucial to my study as it forms the basis of my conceptual framework. Due to the fact that a full Master's by full thesis hinges on depth and length, I chose to put the theories of historical literacy in Chapter 3 to provide a solid grounding for my study.

In order to position my study on Grade 10 South African textbooks, it was essential to assess the nature of research into history textbooks both globally and from a South African perspective in terms of usage, function, purpose, methodologies and the nature thereof. It was important to lay the foundation for what had been written about history textbooks from an international perspective in terms of the role and purpose before moving to an in-depth review of scholarship on South African history textbooks, which is the emphasis of the study. South African history textbooks from both the pre-and-post-apartheid (pre-1994 and post-1994) eras were reviewed in terms of relevant research and significant theories. Analysis of the different eras was vital to review possible changes in history textbooks, trends regarding content, purposes of the history textbooks as well as the nature of said history textbooks. The final section of the literature review culminated with another dimension of South African history textbook research by ascertaining an overall scholarly depiction of the present state of research into history textbooks in South Africa. This conclusion on the current state of research into history textbooks was essential to understand the context of Grade 10 history textbooks being used in this study.

## **2.2 The rationale and purpose of history textbooks**

In order to understand the nature of history textbooks, it was vital to review the concept of what is implied by the term “history textbook”, as well as the function thereof, since a clear understanding of the nature and purpose of textbooks is vital to this study. According to Husbands (1996, p. 88-89), “... the principal teaching tools we have to develop our learners understanding and awareness are words: their words, our words and the words of actors in the past as they are presented to us in documents, or as textbooks”, as Apple and Christian-Smith, as quoted by Polakow-Suransky (2002, p. 4) stated: “Texts are not simply ‘delivery systems’ of ‘facts’. Texts, in this context, are understood as textbooks. History textbooks are the result of political, economic and cultural activities, battles and compromises. History textbooks

are conceived, designed and authored by people with real interests.” Furthermore, textbooks are generally accepted by the public to be “authoritative, accurate and necessary” (Down, as cited by Apple & Christian-Smith, 1991, p. 5). The nature of history textbooks is that they are social, economic and political vaults of perceived knowledge deemed necessary by the particular government. As history textbooks are widely used by teachers, a history textbook’s function and role in classrooms and society becomes vital to analyse.

There were a number of international views from, amongst others, Bourdillon (1990), Crawford (2000), Ogawa and Field (2006), Thornton (2006) and Haydn (2009) concerning a history textbook’s role, function and purpose. History textbooks are created by people and/or governments with vested interests which depict, determine and encourage the history textbook’s function “It is common knowledge that confirmed [history] textbooks reflect the legitimate credo of the power centres” (Firer, 2009, p. 1).

Bourdillon (1990) asserted that the purpose of a history textbook was for use in schools to support a course or curriculum wherein learners’ knowledge is influenced concerning their past and environment. Moreover, history textbooks were representative of what the state deemed necessary for learners to know. In addition to the transmission of “relevant” knowledge, history textbooks were a means of identifying the cultural, political and social norms of a society. The subject of history by its nature allowed for learners to engage with and foster core heritages and common values in order to adopt and embrace a national identity (Ogawa & Field, 2006, p. 43).

History textbooks allowed learners to view the existing cultural and social order within society’s realms of influence (Crawford, 2000; Ogawa & Field, 2006). Similarly, history textbooks provided the official version of a nation’s



past as well as their situation locally and globally. In addition, history textbooks provided a history of a society's past and a map of how a particular society came to be. This is particularly true of school history textbooks, as a reference of time and space is portrayed which allows learners to understand how they came to be in terms of what social, economic and political influences they had (Pingel, 1999). Thus history textbooks can be seen as a vital means to view the aspirations of the ruling power and other social, economic and political aspirations of a society.

Similarly, Thornton's (2006) research equated the purpose of history textbooks with evaluating a society's view of what is deemed to be important. He asserted that history textbooks have various meanings or uses within society. Thornton (2006) identified various functions of school history textbooks. Firstly, "(t)extbooks could be approached as repositories of legitimated historical knowledge" (Thornton, 2006, p. 15). In addition, history textbooks could facilitate the function of representing what learners may be expected to know and/or learn from historical instruction. Thornton described the third approach as a means of curriculum material wherein activities are provided with the intention of the learners engaging with the textbook meaningfully and educationally. Thornton's (2006) research on history textbooks defined the functions of history textbooks as being the vehicle of what the government approves as historical knowledge, the respective history curriculum as well as content knowledge.

The issue of the publishing of history textbooks was integral to the study and needed to be reviewed in conjunction with understanding a history textbook's role, function and purpose was the aspect of publication and/or publishing. Nicol and Dean (2003) confirm the fact that in commercial educational publishing, history textbooks remain the dominant teaching text. A history textbook is a commercial commodity produced by companies with the intention of selling to generate a profit. Crawford and Foster (2006) argued the pursuit of profits in publishing companies has resulted in educational

considerations being negated. An insightful interrogation and offer of historical content and historical skills, within history textbooks, may be sacrificed in favour of profits. Furthermore, history textbooks, at the hands of publishing companies seeking profits, may offer little historical value. Textbook sales in the United States of America, for example, form a business which produces \$2.5 billion annually. Apple and Christian-Smith (1991, p. 5) identified a concerning issue relating to the quest for higher profits, in that education ideals and integrity may be ignored or sacrificed: "Textbooks are economic commodities and it has been argued that they are published for economic rather than intellectual reasons." In addition to the lucrateness of the publishing industry, Apple (1991) identified the competitiveness within the history textbook publishing industry as also being as potentially having a detrimental effect on the educational value of the history textbook. Consequently, there was the danger concerning the production of quality history textbooks as some publishing companies may opt for quantity and financial gain rather than quality of content, exercises and educational merit. The appropriate historical content and skills necessary for achieving historical literacy may be scant, overlooked or purposely ignored. Moreover, some of the role-players may merely be interested in history textbooks for the sake of publishing and not for the actual educational content and skills that need to be included and generated (Apple, 1991).

After having analysed the purpose, function and role of history textbooks, it became clear that there may be inherent challenges regarding the handling and usage of the history textbooks. Through the nature of the discipline, history textbooks have the potential of being both educational and political tools as sanctioned by the state. Furthermore, the publishing industry plays a vital function in a history textbook's purpose. Due to the contentious nature of history as well as the incredible power the subject has to yield, a history textbook holds the possibility of being abused by governments, publishing houses and individuals.

Pingel (1999) stated that some history textbooks have the latent threat of glorifying and justifying the existence of the ruling party at the expense of other minority groups, as was the case under apartheid. Moreover, instead of facts being presented, ideologies were conveyed. In turn, Crawford (2000) argued that history textbooks, as ideological discourses, are inextricably bound. This implies that authors have their own agendas and have inherent subjective opinions. This entails that no history textbook is written free of bias. Every textbook author subscribes to a particular discourse, has his/her own beliefs and views and they come from a certain background. Subsequently, when the history textbook author eventually writes the relevant chapter, it is intrinsically infused with his/her ideologies. In addition to possible history textbook author biases, the sanctioning government, educational authority and publishing house also impose their philosophies on the history textbooks. Thus history textbooks could often be seen as a tool to transmit desired knowledge as well as a vehicle to transmit political and social messages. In spite of the innate biases within history textbooks, it is generally supposed that the facts therein are assumed and accepted as the “truth” by teachers and learners.

History textbooks satisfy the role and function of developing historical understanding. Teachers and schools rely on history textbooks for ensuring that the requirements for the curriculum are adhered to and satisfied (Ornstein, 1994). Furthermore, history textbooks are an educational tool widely utilised in classrooms and are vital for the illustration of certain concepts, information and historical skills. History textbook research revealed that in order to view what a society deems important or necessary, history textbooks could be used as a lens to review society. This entails that the status quo, of a government of society, is legitimated through the use of history textbooks and may also be ideologically loaded and used as a political tool by the government. Another function of history textbooks, as revealed in the literature, is a means of

redressing the past with the inclusion of exclusive history. However, the concern of history textbooks is that they are susceptible to presenting the social, economic and political aims of society. Finally history textbooks, at the hands of publishers, have the potential of sacrificing historical integrity in favour of attractive publishing prospects. Overall, trends in history textbook research revealed a gap or silence as most of the literature describes content-based studies and not a holistic review of historical skills encompassed within content (the incumbent historical literacy). In addition, the position of a history textbook is ideologically based and its purpose is to educate learners and very often purport the ideals of the government.

### **2.3 Research into South African history textbooks**

Globally, history textbooks are widely used by teachers and learners as they are easily accessible and a valuable resource for teaching. In addition, history textbooks act as officially sanctioned vehicles purporting social, economic and political information that is deemed necessary for learners and society. This is no different in South Africa. History textbooks have been used to entrench the status quo before, during and after apartheid.

In this thesis, South African history textbooks are reviewed in two parts, namely pre-1994 and post-1994. The section on pre-1994 briefly extended to pre-1948 to understand the landscape history textbooks functioned in before the legitimisation of apartheid. The section on post-1994 established the current situation and context history textbooks operated within. Analysing both eras of the nature of history textbooks pre-1994 and subsequently post-1994 was vital to my study to know what progression, if any, history textbooks had undergone. Thereafter, my position of the study was grounded as a thorough background knowledge of history textbooks was established. Furthermore, in

order to fully understand the current nature of history textbooks in South Africa, it was crucial to review the historical landscape of history textbooks.

Chernis (1989) provided a thorough and detailed account of the historical backdrop regarding history textbooks. Chernis' research traced the earliest documented research pertaining to history textbooks from 1839-1989. His research attempted to demonstrate the role of history teaching through the use of history textbooks and history curriculum in the interconnectedness of national consciousness and historical consciousness. In his research he analysed the Boer Republics and British Colonies with regard to the development of history textbooks as well as history textbook research. To illustrate Chernis' ideas regarding the state of history textbooks in South Africa, the Boer Republic of the Orange Free State was examined as a republican example and the Cape Colony as a British colonial example.

The two Boer republics, namely the Transvaal and the Orange Free State experienced a shortage of history textbooks during the late nineteenth century. This shortage was due to the fact that the only freely available history resources were Dutch textbooks with difficult and foreign concepts (Chernis, 1989). During the 1870s, the Orange Free State sanctioned financial assistance for the development of history textbooks. History textbooks from the Republic of the Orange Free State reflected the importance of Afrikaans as a language and the Afrikaners as an identity, and a cultural grouping. Similarly, historical content was chosen to purport and glorify aspects of Boer history and the history textbooks explored historical content such as the Great Trek (Chernis, 1989). Master symbols were thus created, centralised and enforced within history textbooks. Furthermore, the British as well as Africans were demonised and deemed responsible for Boer hardships. The Orange Free State history textbooks entrenched ideas of race and superiority in order to create and sustain an identity. Ultimately, a need for a segregated existence in South Africa, through the Orange Free State history textbooks,

was perpetuated. Furthermore, history textbooks fulfilled the function of creating and promoting the identity of one grouping, namely the Boers, at the expense of other races and ethnic groupings.

The Cape Colony was explored as an example of a British Colony's response to history textbooks. The Cape Colony's parliament proffered a history textbook in 1895. George McCall Theal, who later became a prominent historian, was one of the first documented authors to write a history textbook in South Africa. However, Theal's writing of history was emotive and biased. As such, history textbooks, in the Cape Colony, legitimated the desired status quo and justified and ingrained the existence of British control in the Cape and Natal colonies. Chernis (1989) described history textbooks from the Cape Colony as being largely pro-colonial and pro-British. History textbooks were further segregated according to language, being exclusively English, as well as race. Ultimately, British-sanctioned history textbooks were essential in legitimating British control and the notion of superiority regarding race and language.

History textbooks, regarding the British and the Boers, as documented by Chernis (1989), served to illustrate that government-constructed content and ideals were used to reinforce, consolidate and ensure power and the maintenance of the desired status quo. This notion was already prevalent in South African history textbooks from the 1870s. It could therefore be concluded from the research conducted by Chernis that segregation based on race and language dominated South African history textbooks pre-1948. Historical content, in history textbooks, was chosen to glorify either the Boers and/or the British respectively. In addition, issues of race and language were used by both the Boers and the British to alienate and subjugate the so-called inferior or lesser races.

A review of history textbooks pre-1994, during the apartheid era, exposed the narrow and manipulative role history textbooks continued to play in firmly entrenching the apartheid system. Much of the history textbook research undertaken, after the implementation of apartheid, dealt with case study-related theses ranging from the interrogation of individual history textbooks to a landscape review of history textbooks and the function of history textbooks. The themes of race and power found within history textbooks, exposed by Chernis (1989) continued throughout the apartheid era. In addition to the theses, a number of academic articles were written, post-apartheid, about apartheid history textbooks. The literature review will firstly analyse the theses and subsequently the academic articles.

Auerbach (1964), Martin (1980), Chernis (1989), Matoti (1990), Schutte (1990), Evans (1991), Gambushe (1998), Da Cruz (2005) and Engelbrecht (2008) have all written theses concerning the landscape of history education with special emphasis on the role history textbooks have played during and after apartheid. In addition to the theses regarding history textbooks, the publishing of history textbooks and the role they played during apartheid, a number of scholarly articles have been written regarding the two eras of South African history textbooks. Johnson (1982), Dean *et al* (1983), Weldon (2006) and Engelbrecht (2006; 2008) interrogated history textbooks during the apartheid era in publications such as articles. The knowledge framework within the time frame of pre and post-apartheid history textbooks created a developmental landscape of two kinds of knowledge; that of theses and that of articles. Both kinds of knowledge (theses and scholarly articles) were important to develop an effective picture of history textbooks in South Africa and were dealt with in an intertwined and chronological manner.

The first to venture into the field of scholarly research into history textbooks and history education, in South Africa, was Auerbach in 1964. Using quantitative research methodologies, Auerbach (1964) investigated whether

the racial and segregated divisions in society were represented in school history textbooks. His research traced the origin of discrimination in history textbooks to Christian National Education (CNE). In his review of history textbooks and history curriculum, Auerbach found that CNE permeated every history textbook and all history syllabi in South Africa (Dean, 1983). The subsequent result of the landscape of history textbooks during apartheid was that they satisfied the aim of the NP by "... inducing all white children to adopt an attitude of superiority" (Auerbach, as cited by da Cruz (2005). The notion of nationalism and patriotism of the white race was purported in history textbooks to reinforce CNE ideology. Auerbach's findings confirmed the role history textbooks played during early apartheid. History education and history textbooks were synonymous with distinct prejudice and their function was to entrench notions of racial difference and segregation. Auerbach's research also identified an area of history textbook research wherein a number of silences existed. The role history textbook authors, or the government, or the aspirations of society in general play was acknowledged, but not explored, by Auerbach. Auerbach's research recognised that his research does not evaluate the inherent motives of history textbook writers, but he agreed that there were vested interests in the writing of a history textbook as well as in the publishing thereof (Da Cruz, 2005). This idea was vital to this study as a history textbook is born of a number of systems and selfish interests as explained earlier, namely the author, publishing company and the sanctioning government.

Sixteen years after the groundbreaking work by Auerbach the next scholarly work on history textbooks, in South Africa, was that of Martin (1980). The purpose of this thesis was two-fold. Firstly, Martin investigated the school textbook market to identify potential publishing problems in the publishing of school textbooks. Secondly, Martin hoped to gauge possible trends in black education so as to predict and consider the implications of the school textbook publishers. Martin's research generically focused on school textbooks and not history textbooks *per se*. It was nevertheless valuable to review the state of



textbook publishing in South Africa during apartheid. Martin (1980) analysed the demand for white school textbooks in white urban areas as well as for blacks in the homelands. In addition to the demands of school textbooks, marketing techniques were also compared and/or contrasted. Martin claimed that the main outcome of his research was that there were a number of problems relating to the publishing of school textbooks with regard to language, finance and the educational merit contained within the textbooks. The cause of these problems was directed at the fragmentation of the textbook market due to race and the large number of education departments. The use of ten languages perpetuated the problem regarding history textbooks, as historical value or historical integrity concerning the content and skills was scant and not represented equally or consistently across the languages. Martin's view of the future of black education was described as altering and adapting to being under the central control of one DoE. The importance of this research, to this study, is the fact that education in general, including history education, was fragmented along lines of race and inequality. History textbooks were exclusive in the sense that they were not representative of the majority people in South Africa and illustrated and encouraged the vested interests of the white population at the expense of blacks. Thus race dominated the publishing of history textbooks.

Johnson (1982) analysed the role history education and history textbooks played in establishing and entrenching apartheid. In his paper, Johnson explored the relationship between education and its tools, namely history textbooks, within apartheid South Africa. The findings of his study reiterated the role the South African education system played in validating apartheid: "Formal education is a principal instrument in this process [apartheid]," (Johnson, 1982, p. 222). Furthermore, according to Johnson, history textbooks became the vehicle with which to deliver the ideals of apartheid through history education,

It is actually not only the white South African's skin which is different from that of the non-white. The white stands at a higher

level of civilization and is more developed. The whites must so live, so learn, and so work that we do not sin to the level of civilization of non-whites (Johnson, 1982, p. 223).

Johnson (1982) characterised the messages contained in history textbooks as having two distinct branches. Firstly, the history textbooks were laden with discriminatory messages. History textbooks insisted on glorifying the notion of white superiority and promoted the fact that whites needed to remain a level of civilization above the so-called lesser-developed races. These notions of separate education and development was reinforced by Bantu Education and advocated through textbooks by teachers. Secondly, history textbooks further promoted the ideals of the NP regarding segregation and separation. History textbooks were therefore political tools used to reiterate the country's social hierarchy, namely Africans having to adhere to the rigid social order of accepting the white way of life willingly and unflinching (Johnson, 1982).

From reviewing the literature on research into history textbooks in South Africa, it was clear that a stronger interest was developing in this topic. Subsequently enquiries into history textbooks were gaining momentum in South Africa. Dean *et al* (1983) conducted research in which she aimed at analysing South African history textbooks and the way they reflect the preoccupations of the South African political system based on racial segregation. According to Dean *et al* (1983), history education and education in general became the means with which discrimination was entrenched through legislation. The findings of this study were based on the observations of the type of content covered in history textbooks. Dean *et al* analysed the notion of whose history is portrayed in history textbooks. The researchers concluded that white objectives and supremacist goals were legitimated whilst blacks were demonised as "obstacles to the achievement of white objectives" (Dean *et al.*, 1983, p. 53). Consequently racial difference was foregrounded in history textbooks to purport the notion of superiority versus inferiority of races.

Physical differences were likewise highlighted so as to entrench racial differences. Hence the idea of racial inequality was central to history textbooks of the apartheid era and “(t)he concept of ‘national identity’ is a key one in the philosophy of apartheid” (Dean *et al.*, 1983, p. 60). As a result, the authors claimed that the content chosen for the history textbooks analysed glorified the Afrikaners as God’s chosen people and therefore any subsequent actions, undertaken by the government, could be justified (Dean *et al.*, 1989). Another common theme in history textbooks, explored by Dean *et al* is the concept of “white folk wisdom”. The assumption and stereotype promoted in apartheid history textbooks was that the whites in South Africa should be trusted to have the best interests of the country at heart and should not be bothered or argued with. The final criticism of South African history textbooks by the researchers on this project relates to racial prejudice as every race had to be categorised and divided. Historical explanation, in the form of the content of history textbooks, was instrumental in affirming the system of racial segregation which was in turn reiterated in history textbooks (Dean *et al.*, 1983). In the case of *Dean et al’s* research, a number of key assumptions were drawn together concerning history textbooks during the apartheid era. History textbooks were central tools of discrimination to affirm the NP’s goal of racial segregation. Similarly, content chosen for history textbooks reinforced a mono-perspective of the country by painting blacks as inferior in favour of bolstering the whites in South Africa. Underpinning history textbooks pre-1994 were the concepts of race and power.

Not only did Chernis (1989) work on some of the earliest documented history textbooks dating back to the era of the Boer Republics and British Colony as reviewed earlier, but his monumental work on history textbooks also dealt with history textbooks during apartheid. Chernis’ (1989) section of his thesis regarding the role of apartheid history education and history textbooks provided a vital grounding for the purpose of history textbooks pre-1994. Like Dean *et al.*, Chernis (1989) investigated the role history textbooks played in legitimating apartheid. As part of this process, Chernis isolated the subject of

history as a tool to promote national understanding. Moreover, history and religious education became synonymous with the NP's goal of nation building. Chernis (1989, p. 45) therefore claimed that "(t)he [history] textbook remains the most important vehicle for the effective transmission of syllabus content". The content in turn contained information concerning society's attitudes, cultural values and preconceived ideas about race and control, or of those in power. In addition to the one-sided content, derogatory language was used and history textbooks were biased and prejudicial. Chernis (1989), in an optimistic tone, possibly as a reflection to the changes happening in South Africa at the time, stated that history textbooks could be the tool to embody change in South Africa, provided there was a fundamental revision of the history curriculum as well as the history textbooks that should serve the former. It was, however, important to remember that he was talking of change, at the hands of history textbooks, during apartheid. Chernis' research is important as it provided an illustration of the function and task of history textbooks during apartheid. The task of history education and history textbooks was to promote the phenomenon of Afrikaner nationalism through identifying formation and legitimising Afrikaner superiority in order to meet the needs of the nation-state. Chernis therefore described history textbooks during apartheid as being flattering of the protagonist (the Afrikaner) and undeserving of the antagonists [the blacks in South Africa]. Moreover, any actions of discrimination and racial segregation at the hands of the NP were deemed necessary to overcome the black antagonists.

Matoti's (1990) thesis saw the light in the cauldron of political change engulfing South Africa in the early 1990s. The thesis broke new ground as it moved beyond mere reflection of the impact of race and content, as it looked at the conceptual development within history textbooks. His thesis superseded previous studies by moving beyond the history textbook research's realm of race and apartheid history education. Matoti (1990) analysed the use of some school history textbooks with special reference to styles of concept presentation to bring about historical understanding. This

was a paradigmatic shift in terms of history textbook research as the study reflected the investigation of historical concepts and skills presentation. Matoti undertook his research by considering whether school history textbooks used in the independent homeland or Bantustan of the Transkei were adequate in preparing the learners for the curriculum expectations. Matoti's main finding was that the poor use of textbooks and the history textbooks themselves were in part responsible for the high failure rate in history. The reason advanced for this was that many of the history textbooks had little to no development of conceptual understanding (Matoti, 1990). Furthermore, the requirements and tools (historical skills, concepts and appropriate historical content knowledge) necessary for the discipline of history to be fruitful were severely lacking. This thesis was vital to my study as it provided a guideline of an alternative view of history textbooks in terms of research. Matoti's thesis advocated what history textbooks should promote more than mere notion of race and power. Moreover, this thesis was valuable to my study as it purported a different kind of historical literacy which embraces historical concepts, skills and content.

In the same year Schutte (1990) researched subject didactical criteria for the selection of a history textbook for the secondary school. In this thesis, written in Afrikaans, Schutte's research regressed, to a certain degree, in the process of history textbook studies as he adopted a specific pedagogic viewpoint of the proposed future of South African history textbooks. This viewpoint was steeped in CNE ideology and seemed to follow a proposed pattern of history textbook use similar to that which was undertaken during the height of apartheid. Schutte's thesis was particularly poignant as he narrowed the selection process of history textbooks to the responsibility of the history teacher. Schutte believed teachers needed to be adequately trained to decide and choose which history textbooks to use as he felt that they were vital to the teaching of history. This view of thinking is particularly challenging as selection and narrowing of a variety of history textbooks immediately opened the door for bias and possible prejudice to suit a certain group of people. Moreover, this selection process could have the potential to empower

individual publishing companies and not promote a common sense of democracy. This research detracted from the works done by Matoti (1990) and his predecessors' theses based on its idealistic stance. Furthermore, this type of research appeared to be a throwback of the era of the past that was about to end instead of an evaluation of the progression of history textbooks.

The fact that the early 1990s was an era of tumultuous change in South Africa made it a fertile era for history textbook research which was illustrated by the fact that a fourth study in three years appeared. Evans (1991), in his research, examined history textbooks and their link with the cultural reproduction of knowledge. Evans primarily used a transition textbook from apartheid to post-apartheid, *Standard 10 Timelines*, to investigate whether so-called legitimate and approved knowledge was transmitted in the classroom, and whether the history textbook in question followed the history curriculum. Upon reviewing the correlation between history content and history textbooks, the possibility of covert/overt government messages, philosophies and/or ideologies within the history textbooks were investigated as well. The process of the study took the route of a questionnaire being sent to learners in an independent homeland or Bantustan, namely Bophuthatswana, requesting them to comment on historical concepts, words and explanations contained within the *Standard 10 Timelines* history textbook. Evans' main purpose was to identify whether the messages, within the history textbooks, contained a dominant ideology from the government. According to Evans (1991, p. 9), "(t)he study of history is directly pertinent to the training of basic skills in reading and writing; the complexity of which increases as the student moves up the ladder of schooling". Evans' findings concerning the role apartheid played with regard to history teaching as well as the role of the history textbooks during apartheid were that school history, as a subject, was vulnerable to poor teaching, perpetuating poor and exclusive content and therefore defenceless to misuse. This in turn ensured that history textbooks were susceptible to distortion of content and ideologies. The outcome of the research was that learners found language and historical concepts difficult to understand. Furthermore, learners

expressed little desire to argue or debate with the teacher for fear of retribution from either the government or the school. In addition to the choice of not arguing, learners perceived the history textbook to be truthful, which ensured that the history textbook was the "... most important communicative vehicle for the transmission of syllabus content" (Evans, 1991, p. 9). Overall, Evans concluded that the history textbook failed to expose certain skills and features pertinent to the discipline of history. This failure ensured that historical skills and skills of critical analysis were lost to the learners. Like Matoti, this investigation went beyond the realm of content and race analysis, and aimed at conceptual understanding within history textbooks.

It seemed that a hiatus in history textbook analysis followed as the next study was only conducted by Gambushe (1998) seven years later. Gambushe's thesis analysed the relationship between matric history textbooks, matric history examinations and the matric history results in the Port Shepstone region of KwaZulu-Natal during the years 1985-1995; an era that spanned the apartheid and post-apartheid eras. Gambushe's research led to a number of conclusions, namely that pre-1994 history education promoted a skewed interpretation of facts. This narrowed interpretation was an attempt to manipulate history as a school subject. Furthermore, prescribed history textbooks promoted rote-learning and benefited the learners who had the skill of memorisation. Gambushe (1998) argued that history, portrayed in history textbooks under apartheid, provided no identifiable skills at all. The discipline of history had been firmly debased and at the end of matric, the subject offered little preparation for life beyond school (Gambushe, 1998). The findings of Gambushe's research asserted that the onus was on educational authorities to revamp and monitor history textbook production in South Africa.

The first academic study on history textbooks in the new millennium was conducted by da Cruz (2005). He completed his thesis by analysing the presence of white supremacist history as it was represented in history

textbooks during apartheid. Da Cruz investigated a South African history textbook in an attempt to find, examine and account for various historical myths surrounding the content presented on South African history in textbooks. Da Cruz's textbook sample focused largely on one publishing company and its textbook production pre and post-1994 to analyse the trends of white nationalistic history. An example of two myths related to Shaka and the Voortrekkers. The myths reinforced within history textbooks regarded Shaka being a bloodthirsty and merciless tyrant whilst the myth purported about the Voortrekkers was orientated by whether the Voortrekkers legally occupied the land they settled on and whether it was previously inhabited or uninhabited (da Cruz, 2005). His findings identified other core contributing factors which affected the field of history textbook research concerning pre-1994. The role of private publishing companies was instrumental in the apartheid state, as NP-desired content and the nature of history textbooks was modelled accordingly to satisfy white nationalistic ideals (Da Cruz, 2005). Da Cruz's key finding was the affirmation that history textbooks were used for white nationalistic purposes. The NP ideologies were synonymous with biased and one-sided content and activities within the history textbooks (da Cruz, 2005). According to da Cruz (2005, p. 19), history textbooks were critical and vital for the NP government as they instilled the required "... beliefs, attitudes and values that are part of the intellectual underpinning of the apartheid system." Furthermore, government control was evident in history textbooks with regard to its regulation, production and use. Da Cruz identified two areas wherein government control of the history textbooks in South African was noticeable. The NP regulated the selection of history textbooks from "approved lists" (da Cruz, 2005 p. 28). Thus government ensured NP-approved content was used by schools. In addition, the orders of history textbooks were conducted at departmental level, guaranteeing the use of myth-driven and biased history textbooks (da Cruz, 2005). Da Cruz's research was useful as it illustrated the power history textbooks could yield as well as the selection and publication of history textbooks and the possible messages therein. Da Cruz's research was a culmination of all of the presiding arguments from other scholars as it analysed one-sided content, the skills



needed to understand the government messages as well as a view of the publishing companies' roles to implement government-ideology. History textbooks during apartheid ingrained ideas of race and power through strict government control in order to legislate white supremacy.

Engelbrecht (2006) offered a new dimension to the study of history textbooks in South Africa. Her research was innovative in that it was comparative in the sense of pre and post-apartheid. However, her study, as was the case with her predecessors, investigated issues of race and power. Engelbrecht (2006, p. 1), in her research comparing pre and post-apartheid history textbooks, argued that the task history textbooks performed during apartheid, was that of control and the transmission of predetermined knowledge and content,

By their nature, textbooks tend to control knowledge as well as transmit it, and reinforce selected cultural values in learners. They act as an officially sanctioned version of knowledge and culture and, consequently, have the power to foster judgmental perspectives. During the apartheid era, only positive aspects of the Afrikaners' past were portrayed in South African textbooks. Differences between whites and nonwhites were highlighted to establish a more favourable disposition for the white in-group and to justify the actions of this group. People of colour were, through simplification and overgeneralization, reduced to a few simple, essential characteristics or stereotypes.

History textbooks, as characterised by Engelbrecht (2006), were government-controlled tools used to legitimise state-sanctioned information which was often one-sided and entrenched ideas of racial difference. Like Evans (1991) and Da Cruz (2005) before her, Engelbrecht identified the role of master symbols and myths in history textbooks that were central for establishing and maintaining NP power. These master symbols, which were evident in history textbooks, described the ideas of whites being superior to blacks, namely the fact that South Africa rightfully belonged to the Afrikaner as well as the

suggestion that the Afrikaner were God's chosen people. History textbooks were used during apartheid to empower and justify one race at the expense of another (Engelbrecht, 2006). Engelbrecht's (2006, p. 2) overall findings of her research summarised the role of history textbooks during apartheid as being inculcated with "racism, sexism, stereotypes, and historical inaccuracies."

Engelbrecht's notions of history textbook use were echoed by Weldon (2006) who, in her capacity as a history educator, argued that the role history education played was in affirming the Afrikaner identity. In addition, the role and purpose of history textbooks were integral to fulfilling the goal of establishing the Afrikaner persona. History textbooks satisfied this aim by ingraining nationalist ideals of social, economic and political development through content, skills and activities.

In conclusion, research on apartheid era history textbooks in general illuminated the fact that history textbooks pre-1994 were biased and one-sided and glorified the white race. History textbooks were used by the government to fulfil the function of the South African government, namely complete social, racial, economic and political segregation. Similarly, history textbooks purported the myths of superiority and the importance of the NP to ensure the success of the apartheid goals of complete racial segregation. History textbooks could be classified according to factors of race, control and power. Historical literacy implied the knowing and understanding of specifically chosen content to glorify whites in South Africa. The emergent trends from the research of the type and nature of history textbooks was vital to my study as it illustrated that pre-1948 as well as post-1948 showed the manipulative role of history textbooks. The patterns of race, power and specific content were interchangeable during and before apartheid. Some of the academics and history textbook scholars highlighted one of the greatest silences regarding history textbooks during apartheid as severely lacking in

disciplinary skills and concepts. The historical literacy of the time denied collective histories in favour of entrenching the ideals encouraged by the NP.

Post-1994, research on history textbooks was initially stagnant and thereafter gathered momentum as scholars, academics, educationists and teachers interacted with the new, democratically orientated curriculum and interrogated the field of history education and history textbooks. History textbook research was seen as an evolving field. Many uncertainties existed concerning how to deal with and counter the remnants of the past regarding history education and its “tools”, namely history textbooks. At the outset, the post-1994 field of history textbooks was in a state of flux. This uncertainty was as a result of the indecision and vagueness concerning the future regarding history education itself. This entailed that many questions were raised concerning what should replace apartheid history education and history textbooks and who should decide that and how the process would be conducted.

Polokow-Suransky (2002) explored the controversy surrounding what type of history education would replace apartheid history education. Furthermore, her research debated how this history might feature in history textbooks with the advent of a new government, post-1994. Polokow-Suransky (2002, p. 2) identified the African National Congresses’ (ANC) primary need as being “... to overhaul the apartheid-era education system, a pillar of the old white supremacist order”. It was the major opposition political parties who ceded the NP. The party spent much time in isolation and won the general election by an outright majority in 1994. This initial response and reaction was a result of years of oppression and an attempt to immediately dismiss all forms of past history education including history textbooks.

The dilemma in “overhauling” apartheid concerned what would replace it and moreover who should decide what was retained or dismissed. Some

educationists felt that all history taught under apartheid should be abolished whilst others argued for the implementation of a synthesised version of history to counter the apartheid history (Polakow-Suransky, 2002). Polakow-Suransky's research revealed that by the late 1990s, new history textbooks still had not been developed and distributed. The government announced that the lack of textbook distribution was a result of a lack of funding. However, Polakow-Suransky ascertained, in her research, that the actual problem was that the government was hesitant to distribute history textbooks in favour of defusing tensions as well as attempting to reduce conflict as an act of nation-building. History textbooks were seen as having the potential to be divisive. The overall conclusion of Polakow-Suransky research was that history textbooks and history education were essential for nation-building, formation and identity-building if used correctly and implemented carefully.

According to Siebörger (2006, p. 228), one of the questions that was frequently asked of educationists by curious journalists and the public was: "What is going to happen to school history?" Siebörger, like Polakow-Suransky (2003), explored the debates concerning what should replace apartheid history textbooks, and curricula were vast and in some cases idealistic as was explored by Siebörger (2006) in his research. With a democratically elected government which aimed to redress past injustices, education had to adapt to suit these ideals of equality and diversity. These debates filtered down to history textbooks too. As the history textbook was synonymous with the curriculum as well as the aims of the NP, a new form of history education had to be developed into new history textbooks for a new South Africa. The discussions proposed a curriculum that reflected the nuances of the discipline of history to be presented in history textbooks. Secondly, a curriculum approach should be inclusive and democratic of content and of all South Africans to be presented in history textbooks (Siebörger, 2006). Thirdly, historical knowledge within history textbooks should be infiltrated by historical skills and concepts. Finally, history textbooks and historical content should not be dealt with in isolation, but as one entity

(Siebörger, 2006). These factors, identified by Siebörger, were central to the discussions regarding history textbooks. By 1996, history textbooks began to mimic the requirements of Curriculum 2005. Some of the factors necessary for Curriculum 2005 which later evolved to the Revised National Curriculum Statement and subsequently the NCS - history ranged from conceptual criteria to practical considerations (Siebörger, 2006). Siebörger isolated the idea of historical consciousness and the language of history textbooks as being central to what history textbooks should look like post-1994. Historical consciousness encouraged learners to use their imaginations and emotions to ensure historical understanding whilst the language within history should be sensitive to all races and gender. No discriminatory words or foreign concepts were encouraged to be used. Siebörger (2006) classified practical factors that were necessary points to satisfy the debates by looking at format, layout, accessible activities, unambiguous language and instructions and the use of primary and secondary sources which were clearly labelled. Overall, the debates surrounding history textbooks called for a review of textbooks so that they may encourage historical understanding and interpretation through appropriately chosen content. The discipline's requirements should be exhibited in history textbooks. Siebörger's research provided valuable insight to my study by illustrating what history textbooks should look like post-apartheid and the pertinent debates therein. Practical and theoretical implications were considered. All facets of inequality should have been rectified as well as the facilitation and development of a new kind of historical literacy comprising skills, representative content and historical concepts. The fact that Siebörger is writing, in 2006, about the nature of what history textbooks should have looked like post-1994, illustrated the idealistic aims of history textbooks, currently, and the fact that many or most of those aims or intentions have never been satisfied.

Against this backdrop, Land (2003) identified constraints that faced South African history textbooks during the early 1990s. With the onset of Curriculum 2005 and the advent of OBE, a number of schools of thought deemed the history textbook unnecessary (Land, 2003). Subsequently, history textbooks

were not being used in schools at all. As a result, the publishing sector shrank due to economic constraints, which resulted in a smaller pool of history textbooks being produced (Land, 2003). Without a need for history textbooks, as advocated by the DoE, history textbooks were deemed unnecessary. In addition to the production of fewer history textbooks, the implementation of Curriculum 2005 further hampered and delayed the need for quality school history textbooks, as publishers and authors were unsure of the DoE's expectations as well as the required content, skills and activities (Engelbrecht, 2006). With the number of changes facing post-apartheid history textbooks, the intellectual integrity of history textbooks was negated in favour of adhering to Curriculum 2005 ideals, and the limited pool of resources from the publishing companies ensured an inadequate range of history textbooks. Regardless of the good intentions to alter the publishing industry, commercial publishers were hampered by the challenges of funding as well as curricular changes. The lack of history textbooks during this transitional stage also accounted for the lack of solid theorising into history textbook research.

Stolten (2003) identified a further constraint for history textbooks post-1994, namely the continued use of apartheid era history textbooks in schools. He argued that this was due to financial constraints facing schools as well as a lack of available alternative texts. To counter the danger history education and history textbooks found itself in, the South African government, under the then Minister of Education, Professor Asmal, in response to a number of the history textbook and teaching challenges, introduced the South African History Project (SAHP). This project came after the detailed *Report of the History/Archaeology Panel* to the Ministry of Education (2002). The SAHP was established as a solution to the challenges exposed by the *Report of the History/Archaeology Panel*. There were a number of vital findings from the *Report of the History/Archaeology Panel* which was fundamental for the implementation of the SAHP. The *Report of the History/Archaeology Panel* conceded that history textbooks needed to be critically analysed in South Africa (DoE, 2002). The report clearly aligned quality history teaching with

appropriate history textbooks so that there could be a meaningful learning experience. The report called for a variety of historical sources to be used which reinforced historical content and the use of historical skills. Despite the well-meaning of the report, a chronic shortage of quality history textbooks was still experienced. The SAHP entailed that historians, history teachers, development practitioners and educationists would prioritise the strengthening of the manner in which history is taught in the classroom (Asmal, 2002). One of the SAHP's immediate goals was to find possible manners in which to foster and create a better understanding and appreciation of new histories in a democratic South Africa so as to satisfy the continuing debates in the country. Asmal believed that promoting and enhancing the status and benefits of learning history would resurrect the interest in studying the discipline. A key component of the SAHP for overcoming obstacles in history education was the writing of quality history textbooks, of which there clearly was a shortage post-1994. The void of quality history textbooks, as exposed by Land (2003), was attributed to ensuing political change and commercial viability. Furthermore, apartheid history textbook authors became disfavoured and uncertainty regarding the curriculum ensured a stagnated realm of history textbooks. After negotiations with a number of stakeholders concerning the role and future of history education, the DoE produced a history textbook to counter the problems being experienced regarding history education and in response to apartheid and curriculum change. The solution was a fully government-sanctioned history textbook, namely *Every Step of the Way* (Morris, 2004). According to Morris (2004), this textbook is one example of the type of history textbooks from the time. It aimed to redress past history textbooks in South Africa. Moreover, it was the official version of history as per the government and what the DoE felt learners needed to know. The subsequent historical literacy therein was determined and fostered by the government.

A new angle to the history textbook debate occurred in South Africa which was introduced by Colin Bundy (2007) who asked deeper theoretical questions

while also proposing a typology of textbook development. Bundy (2007, pp. 88-92) identified and discussed three models of history textbook approach, post-1994. Firstly, the “conservative pluralist/multi-cultural model”, if used, resulted in the content of this kind of history textbook being a “bland”, watered-down version of the past. Furthermore, this model of history textbook would be compartmentalised and localised in terms of individual grouping’s history. Regarding a South African context, this kind of history textbook would ignore potentially controversial content and offer little academic debate. The second history textbook approach was characterised as “Nation-building pluralism”. This version of a history textbook is more of a political nature and sought “... a more explicitly corrective version of the past” (Bundy, 2007, p. 88). This entailed that South Africa’s past would be largely politicised and remain at the forefront of history textbooks. Bundy (2007, p. 91) referred to the final model as the “new model textbook approach”. This history textbook method creates awareness of content as well as interpretations of the past in addition to historical discourses and disciplines. Moreover, it was deemed “progressive” in nature by publishers and incorporated facets of post-modernism. Bundy stated that these kinds of history textbooks provide views of the authors, backgrounds to subjects as well as historical debate. Bundy (2007, p. 92) idealistically and critically argues that one of the functions of a history textbook, in South Africa, should be to

... reflect advances in the discipline of history. That is: school texts should reflect recent and current debates about the past; the approach to the past should be inclusive and democratic; the approach to historical knowledge should be inseparable so that the curriculum conveys a sense of how knowledge is produced and history is not presented as a set of given facts.

Bundy (2007) described the characteristics of post-apartheid South Africa, in terms of history textbooks, as structures encompassing race, power and class. The fact that Bundy, in 2007, is writing about what history textbooks should be like in terms of historical skills and content implies that the history textbooks are not representative of the required skills and content of his new



model textbook. The analytical and exploratory skills are still lacking and the ideas of nation building are still predominant. Bundy theorises and uncovers past debates regarding history textbooks in terms of race, power and content. In the field of history textbook research, no new information has been unearthed, nor are there new questions. History textbooks could still be seen against this backdrop as being used as a political rather than an educational tool.

Like Bundy (2007), another contemporary theorist on history textbooks is Chisholm (2007) who researched the current as well as the past state of history textbooks in South Africa. She acknowledged the vast number of debates during the 1990s, but focused her work on the nature of history textbooks during the millennium. Her research provided an insightful overview of the nature of history education and history textbooks since 1994. She then extended her argument to review the current state of history textbooks in South Africa. Chisholm adopted Bundy's (2007) typology of history textbooks to examine the current state of history textbooks in South Africa. Throughout her findings, Chisholm ascertained that government-sanctioned and curriculum-based history textbooks seem to fall in Bundy's second realm of history textbooks. These kinds of textbooks were politically corrective in nature and sought to reinforce diversity rather than accepting it as a given concept. Diversity was used to categorise and compartmentalise history and people as a reminder of the past instead of accepting differences and focussing on other content. These history textbooks were used as a political means to redress the apartheid era. Her final concluding remark was critical of the current state of history textbooks in South Africa. Bundy's idealistic concept of the new model textbook "... is light years away from its predecessors" (Chisholm, 2007, p. 18). Chisholm does not believe that Bundy's third model of history textbooks exists or is used in South African classrooms. She asserted that the intention of the new model textbook is noble and worthy, but she does not feel history textbooks have evolved to the extent that they are independent of government influence. Chisholm (2007)

argues that the sphere of politically corrective textbooks currently dominates history education. She also acknowledges that more research needs to be conducted on modern history textbooks as well as allowing history to adapt to its role in the curriculum in order to fully review the landscape of history textbooks. Furthermore, Chisholm identified a gap in current research into history textbooks due to the fact that a comprehensive evaluation of history textbook writers was lacking in terms of the role the history textbook writers play in history textbooks since the perpetuation or destruction of certain nuances is in their hands. This is valuable for my study as it exposed a gap for me to satisfy by contacting and engaging with history textbook authors.

With the best part of 15 years having elapsed since constructive, detailed and history textbook-focused research has been done on South African history textbooks, more critical and reflective voices on post-apartheid textbooks in South Africa arose, with one of them being that of Engelbrecht (2008). Engelbrecht's (2008) research was valuable as it is the most current of analyses on history textbooks in South Africa. She critiqued past history textbooks in comparison with and in contrast to current history textbooks and their subsequent transition and state. She believed that history textbooks had the opportunity to solely counter issues from the past. However, her research hinted at the possibility that history textbooks still may not be inclusive or representative of a democratic South Africa, or as Bundy or Chisholm would acknowledge, a new model approach.

History textbooks, according to Engelbrecht (2008), needed to seek a balance, namely redress, reconciliation as well as an analysis of the past. Engelbrecht (2008, p.519) acknowledged this process by stating: "The rewriting of South African history textbooks after the seminal democratic elections in South Africa during 1994 became a tool to counter the Apartheid stereotypes, previously loaded with strong cultural and political content." In editing or dismissing apartheid history education and history textbooks, the danger of simplifying the past or negating its importance was a distinct

possibility (Engelbrecht, 2008). Engelbrecht (2008, p. 520) cited Cole and Barsalou in identifying a new perspective or trend concerning history textbooks, namely that "... after violent conflict history education is usually burdened with many expectations, but 'rarely examined for factual contradictions or tested against reality'". Furthering this new perspective, Cole and Barsalou (as cited by Engelbrecht, 2008, p.521) cautioned that in "explicating" the ideological change in the collective historical mindset and consciousness of South Africans, history textbooks and history teaching in general may become biased and simplified. Thus history textbooks may not be fully or equally representative of the country's collective past or academically sound and inclusive of the necessary historical skills.

Many of the hopes and aspirations of history textbooks post-1994 were of an idealistic nature (Engelbrecht, 2006; 2008). The findings of Engelbrecht's (2008) research concerning history textbooks, post-apartheid, were central to understanding the current landscape of history textbooks. From her study it was clear that the apartheid past, colonialism and Eurocentrism were fully dealt with in history textbooks. Engelbrecht (2008, p. 537) identified that there was more black than white representation in current history textbooks which had the danger of, like in apartheid, fostering a "culture of mono-perspectivity" as one race was depicted more positively than another. The concept of multi-perspectivity fails in current history textbooks (Engelbrecht, 2008). Engelbrecht (2008) examined the role-reversal that has occurred in history textbooks since apartheid. Present history textbooks contain a mono-perspectivity wherein white history is largely ignored in favour of a grand black narrative. Upon expanding on the notion of mono-perspectivity, Engelbrecht identified silences regarding the history of whites in terms of white leaders and their aspirations "... whilst new stereotypical messages were deliberately presented to counter apartheid stereotypes" (Engelbrecht, 2008, p. 537). History textbook research, as elicited by Engelbrecht, revealed that little has changed regarding the state of history textbooks in South Africa. Engelbrecht discussed the concept of Africanisation in her study which is a role-reversal

from apartheid wherein whites are established as the other or antagonist in history textbooks. History textbooks have reverted in a sense and encapsulated some apartheid-ideology in the current history textbooks. In actual fact, all that has happened is a role reversal of perspectives and races within the history textbooks (Engelbrecht, 2008). A final remark concluding Engelbrecht's (2008) research is that the tradition of history textbook research is currently lacking, especially in terms of the pedagogy of history textbooks.

Post-1994 history textbooks were initially characterised by much debate and discussion from teachers, historians, academics and educationists concerning what history education should look like in terms of content, style and nature of history textbooks. For much of the 1990s little to no history textbooks were produced as a result of financial implications, political uncertainty and the implementation of a new curriculum. History textbooks became the DoE's officially sanctioned version of the current status quo with which to redress the past. In terms of the actual representation of what history textbooks looked like, little has changed in terms of the skills and historical content. Idealistic notions of a new model history textbook were developed and discussed perpetuating a history textbook that addressed the needs of the discipline by advocating a historical literacy. However, the fact that educationists are still debating the nature and type of history textbooks surrounding the same themes of race and power implies that history textbooks are not free of political and ideological interference. Power and race still seem to be synonymous with history textbooks. However, instead of a white bias, there is a black mono-perspective and role reversal of apartheid and post-apartheid myths (Engelbrecht, 2008). Chisholm (2008) identified a silence regarding the lack of research into the role of history textbook authors in the writing up of school history. Overall, debates concerning current history textbooks are of an idealistic nature and no new questions are being asked or answered in terms of history textbook research.

## 2.4 Conclusion

History textbook research pre-1994 traced the use of history textbooks for nationalistic purposes to entrench ideas of race and superiority and to consolidate power. This progression was evident throughout the traced eras of pre-1948 and pre-1994. The Orange Free State Boer Republic, as well as the Cape British Colony manipulated the use of history textbooks to satisfy political ideals and entrench notions of racial superiority. Furthermore, history textbooks as well as their authors were biased. Similarly, during apartheid, perspectives of racial supremacy and justification of white power infiltrated the history textbooks in the chosen content and the perpetuated particular myths within. History textbooks mimicked the ideals of the government. Publishing companies were also racially divided with more attention, effort and money being allocated to white history textbooks. Post-1994 posed a dilemma for history textbooks as it was initially in a state of flux and uncertainty as to the route of history education and the use of history textbooks. This period was characterised by much debate as to what history textbooks should look like and whether they bore any educational merit. After the implementation of Curriculum 2005, history textbooks were not being used in schools. Consequently the little need for history textbooks caused financial instability for publishing houses as there was no longer a demand. The uncertainty of the then newly proposed curriculum also posed challenges for publishing companies that were not sure of DoE expectations. Subsequently, some of the history textbooks produced contained little historical merit. As a solution to this quandary, the DoE instigated an investigation into the discipline through the *Report of the History Archaeology Panel* and they implemented the SAHP to uplift and rediscover the discipline of history. During this period, history textbooks were produced by the DoE to satisfy and endorse the aims of the government. The predominating debates and research at this time was the type of history textbooks being used for history and what they should look like. Some discussions and research advocated a means of redress for history textbooks, whilst others proposed a history textbook which comprised the

elements of the discipline. In actual fact, history textbooks do not seem to have developed much in terms of content and nature, which is investigated by Engelbrecht (2008), who ascertained that current history textbooks have undergone a role-reversal in that all content and skills favour the new government, and notions of power and race are still evident in history textbooks. Similarly, Chisholm (2007) argued that this ideal of a new model textbook as proposed by Bundy (2007) remained elusive. However, throughout both eras, namely pre and post-1994, history textbooks seem to maintain the notion of race and power. Moreover, current history textbooks have undergone a role-reversal which has ensured that race; power and content still serve to purport government expectations and aspirations.

The exploration of the literature has uncovered a number of trends, themes, gaps and silences that satisfy and ground the niche of my study. No research has been conducted on the functionality of a history textbook in a Grade 10 South African history classroom through ascertaining what kind of historical literacy is envisioned in a history textbook. In addition, the research conducted on South African history textbooks exposes the adages of race, content choice and power continually. No new or existing questions have been raised concerning the literacy within history textbooks. Moreover, studies on history textbooks dwell on analysing the transition from apartheid to the present without truly analysing the literacy advocated by the specific history textbooks. The niche for my research fulfils the notion of functionality within the history textbook study's realm. Furthermore, the lack of research, not only in volume or scale, but also concerning the very new international themes, sets up the position of my study to view South African history textbooks from the vantage point of a contemporary development in history education, namely historical literacy. Ultimately, my research satisfies the niche of investigating the nature of current history textbooks in terms of the type of historical literacy contained therein.

### **CHAPTER THREE**

## **HISTORICAL LITERACY – A REVIEW OF THE LITERATURE**

### **3.1 Introduction**

As already illustrated in Chapter 2, the literature review was divided into two chapters to allow each section of knowledge the justice it deserved. Chapter 2 was a comprehensive analysis of history textbook research whilst Chapter 3 explores the concept of historical literacy. Due to the fact that my study is a Master's by full thesis, the literature needs to provide an in-depth review of pertinent debates, theories, concepts as well as inherent silences and gaps exposed through the literature.

The concept of historical literacy is relatively new with a wide range of debates surrounding it. There is no one acknowledged authority or expert nor is there an internationally accepted version of what the concept of historical literacy entails. There are, however, similar characteristics of what constitutes historical literacy shared by a number of historical literacy theorists. Whilst some specifically reference the term "historical literacy", others do not exclusively use the term but provide vital contributions to the concept by exploring factors which the historical literacy theorists deem to be necessary components of historical literacy.

This chapter is an inclusive review of the literature pertaining to historical literacy. Firstly, the concept of historical literacy is scrutinised from a number of vantage points. The idea of "literacy" needs to be briefly evaluated in order to understand the progression and evolution of the term "historical literacy". With the intention of understanding the construct "historical literacy", I had to grasp its origin in the context of other existing literacies of mathematics and language. Thereafter, historical literacy theories are analysed from historical literacy theorists in order to understand the debates surrounding the concept. In addition, scholars on the periphery of the ideas surrounding historical literacy are reviewed as they enlighten the argument proposed by the

historical literacy theorists. The section on historical literacy is concluded by a theorisation as to what the concept constitutes. The understanding of the literature pertaining to the concept of historical literacy is essential for developing my conceptual framework which is critical for my analytical instrument.

### **3.2 Concept clarification of historical literacy**

The concept of “literacy” originated in the realm of language education. In the latter few years, other disciplines such as mathematics, for example, have adopted the concept of literacy to identify the necessary criteria of being considered literate in their respective field.

In very rudimentary terms, one can be referred to as “literate” with regard to language if one can read, speak and write (Daley, 2003). Roberts (1995, p. 418) defined literacy as the ability to interpret and internalise “recorded symbolic information.” Literacy implies communication within the language sphere. Furthermore, language is synonymous with literacy as it allows for people to conceptualise ideas and abstract information in order to receive and share knowledge (Daley, 2003). A literate person will be able to effectively manage in every day situations through communication and the necessary skills of reading, writing and speaking to make meaning.

A more recent development in the realm of literacy is that of mathematical literacy. Mathematical literacy can be viewed as a descriptor for the functional competency of measuring success in the discipline of mathematics. This type of literacy is practical in the sense that it depicts vital concepts and skills necessary for the discipline and a learner’s life (Gellert *et al.*, 2001; Hobden, 2005). Mathematical concepts, methods, experiences and opportunities are deemed imperative factors for the development of mathematical literacy. The term “mathematically literate”, as used by Gellert *et al* (2001, p. 59), describes learners as being “well-informed” and “well-educated” individuals that can effectively function in society.



The examples of language and mathematical literacy serve to illustrate the trajectory of the literacy of history. It is not the purpose of my study to comprehensively investigate each literacy, but to provide a platform for the birth of the concept of historical literacy. The skills of reading, writing and speaking are fundamental aspects of being considered literate in the language realm. Similarly, functional competence of skills and concepts from mathematics are necessary for the discipline's literacy. These cornerstones of literacy determine how one functions in society and to what degree information is assimilated and communicated. Furthermore, the concepts of reading, writing and functional competence are vital for inferring meaning of a given context or scenario. Mastery of these factors determine to what extent one is literate or not. This directly relates to the understanding of the concept of historical literacy in that the term "literacy" denotes comprehension of a given situation based on the use of certain tools to make meaning. Thus literacy requires subject-specific tools for a person to be considered literate. It is from the evolution and the review of other literacies that the understanding of the term "historical literacy" is possible.

Historical literacy, as with other literacies, is not a definite and finalised concept. Growth in the comprehension of historical literacy and the research of historical literacy is ongoing. Ten historical literacy theorists are brought to the fore in this review as they explicitly use and coin the concept of historical literacy. Ravitch (1989), Wineburg (1991; 2001), Perfetti, Britt, Rouet, Georgi, and Mason (1994), Taylor (2003), Rabb (2004) and Lee (2004) specifically explored the concept of historical literacy. In addition to the historical literacy theorists there are a number of educationists who elaborated on factors regarding the purpose of school history which are integral to understand the developing concept of historical literacy. The peripheral ideas of history educationists are vital in ascertaining the holistic view of historical literacy as they explore key factors facilitating historical literacy. The theories of Boix-

Mansilla (2000), James (2000), Haydn (2001) and Wilson (2008) are reviewed as supporting ideas which support, enhance and strengthen those of the historical literacy theorists.

The first scholar to actively introduce and compellingly argue for historical literacy was Ravitch (1989). Her research vehemently opposed the inculcation of social studies and the subsequent frivolity of the delivered curriculum pertaining to history. The context within which she was writing was in the United States of America during the 1980s. Furthermore, education was a paradigm of hardened conservatism. The mindset during the 80s and 90s was that teaching historical content was purposeless for learners; "... the goal of the social studies is to teach critical thinking, or values, or respect for cultural diversity" (Ravitch, 1989, p. 50). In order to identify the effects of the watered down version of history, Ravitch investigated a number of secondary schools to identify the level of historical content knowledge she deemed important for ordinary success in the discipline. Ravitch's (1989) view of historical literacy was that the concept referred to levels of historical content knowledge, which is an accumulation of facts concerning past events. At the end of her investigation she revealed that an alarming rate of historical illiteracy existed in American schools. Ravitch ascertained that there was an "erosion of historical understanding" among the youth in America (Ravitch, 1989, p. 52). "The foundation of literacy" was skills-based and not content-based, which ensured that young Americans were historically illiterate and ignorant of their past (Ravitch, 1989, p. 52). Thus Ravitch's view of historical illiteracy was the fact that learners were exposed to skills only, rather than to content. Her study is also in reaction to the UK's SHP's skills-driven influence on American education. Provided learners were adequately exposed to effective history teaching, the discipline of history teaches learners the notion of truth and historical understanding, which learners could then use in any given context in life (Ravitch, 1989). Her research acknowledged that historical literacy was the accumulation of historical content knowledge which was tantamount to providing a conceptual framework for the learners to build upon in order to be

considered historically literate. At the time of her study, the acquisition of skills seemed synonymous with the assimilation of historical knowledge, which was what she vehemently argued against. Thus the argument for a historically literate learner, as championed by Ravitch, referred to the achievement of appropriate levels of historical content knowledge as opposed to skills acquisition. She stressed the benefit of what she regarded as appropriate historical literacy in the concluding passage of her research: "Properly taught, history teaches the pursuit of truth and understanding; it establishes a context of human life in a particular time and place." (Ravitch, 1989, p. 68.)

Rabb (2004), despite writing fifteen years later, concurred in the concept of historical illiteracy as purported by Ravitch. The critical value of historically literate learners was a vital component of Rabb's argument as to the benefit of learners studying history: "Children will, perhaps, have learned to read and count, but certainly not to think, let alone understand how they have been shaped by their past." Historical literacy, as advocated by Rabb, means that the acquisition of historical content knowledge is paramount for the development of a learner. Historical content knowledge implies the interrogation and learning of key historical facts. Learners that fail to have the appropriate content knowledge, as prescribed by curricula or governments, are not historically literate (Rabb, 2004). Rabb deems these historically illiterate learners as being ignorant and that they are severely hampered by not knowing their past and not identifying with it. The failing levels of what he regards as historical literacy in the United States of America could be attributed to the fact that learners are being taught historical skills, not content, which results, in his view, in learners being trained and not duly educated (Rabb, 2004). In the same vein as Ravitch's (1989) research, Rabb acknowledges that historical content is tantamount to providing a conceptual framework for the learners to build upon in order to consider historical literacy. According to Rabb, learners are forgetting integral content or the pertinent content is not being assimilated or taught; thus background knowledge is lost or not developed and no conceptual framework is formed: "Some information is so basic, so essential that all students must know to make sense of new

learning,” was Ravitch’s (1989, p. 53) remark. Rabb’s view of historical literacy is inspired by the teaching and learning of historical content. Furthermore, his argument provides a different dimension to the concept of historical literacy as he clearly distinguishes between ordinary literacy and historical literacy. The alternative element to the understanding of the concept of historical literacy is that it moves beyond the literacy realm of reading and writing to a deeper territory of comprehension and knowledge of one’s past.

A different perspective of historical literacy is offered by Wineburg (2001) which is in stark contrast with the argument that historical literacy is content-driven. Wineburg argues that historical literacy supersedes mere content knowledge, as basic historical skills are essential for historical literacy. His view of historical literacy is that it can be divided into three heuristic domains, namely sourcing, corroboration and contextualisation. Sourcing refers to the evaluation of sources and other historical documents. Learners are required to be mindful and critical of historical sources. Sourcing implies that learners are required to evaluate and interrogate the origin, reliability and value of sources so as to understand their purpose or use. Corroboration in turn requires that the learners review, cross-check and examine the facts or information within the sources with other documents. This is a key requirement of historical literacy, as advocated by Wineburg, because learners need to know how to deal with conflicting and contradicting information by cross-referencing it with other information. In this way, learners are exposed to multi-perspectives (Wineburg, 1991). On the other hand, contextualisation locates the events, discussed in the sources, in a larger context. Contextualisation is essential as learners have to realise that events and people’s actions do not occur in isolation, but as a process and as part of a certain scenario. Therefore learners need to understand the context within which their sources are produced (Wineburg, 1991). Wineburg believes that even the basic heuristics, of source analysis, is necessary to “... create historical interpretations” to achieve historical literacy (Wineburg, 1991, p. 84).

Boix-Mansilla (2000) argued in much the same manner as Wineburg (1991). The perspective of historical literacy, purported by Boix-Mansilla, pertained to the importance of source/text analysis which could be likened to Wineburg's use of heuristic domains. The purpose of school history for her was more than the mere learning of facts concerning the past; it comprises various modes of thinking as well as skills (Boix-Mansilla, 2000). A historically literate learner should be comfortable with analysing a number of different sources in order to come up with possible perspectives and accounts. Conflicting narratives should be dealt with from multi-causal explanations and careful examination of evidence in order to compare and contrast events and opinions within sources (Boix-Mansilla, 2000). The process of heuristics, leading to historical literacy, implies that learners have to select and evaluate sources, contextualise them in terms of other sources and finally make historical meaning thereafter. The concept of historical literacy, in her view, gains momentum in the sense that skills are as critical a component of historical literacy as is content knowledge.

In Wineburg's later research, he investigated the construct of reading in history (Wineburg, 2001). The outcome of this study was that the reading of history is a skill to be learnt. Reading of historical sources move beyond the literal and "inferred" text to Wineburg's notion of the "subtext" (Wineburg, 2001, p. 65). The subtext in this case refers to the hidden and/or covert meanings. Historical literacy facilitates the skills necessary to decode these latent messages. The goal of historical literacy "... is not something transmitted from the text to the student but as something developed in the student by questioning the text" (Scholes, as cited by Wineburg, 2001, p. 84). Within this context it can be understood that the term "text" translates to a historical source or document. Thus the skill of the "reading" of history, i.e. the literacy of history, within sources was further discussed by Wineburg's realm of heuristics. Furthermore, the reading of historical evidence is critical to making meaning of the information to be labelled "historically literate". Wineburg thus argues that skills, coupled with content, ensure a historically

literate learner. Furthermore, heuristics provides a method for attaining a critical understanding of historical literacy.

A group of theorists: Perfetti, Britt, Rouet, Georgi, and Mason (1994) used the gist of Wineburg's argument of historical literacy whilst they investigated the notion of historical uncertainty. Perfetti *et al* used Wineburg's notion of heuristics to elaborate on and substantiate their view of historical literacy. Their investigation analysed what is meant by the concept of historical literacy so as to understand what causes historical uncertainty for some learners. The view of historical literacy that Perfetti *et al* (1994, p. 260) argued bridged the gap concerning the debate of historical skills and content, namely that "(h)istorical literacy involves not only the learning of historical events, but also the use of interpretive reasoning." Historical literacy therefore moved beyond the realm of merely learning historical events to the use of interpretive reasoning of and about the said events (Perfetti *et al.*, 1994). Perfetti *et al* discussed four components necessary for learners to read historical texts (sources/documents) effectively. Firstly, learners should be able to detect author bias when reading a text or source. Secondly, learners should develop and be taught the important skill of "handling inconsistencies among the texts", which entails that texts be evaluated in terms of their reconstruction (Perfetti *et al.*, 1994, p. 265). Thirdly, learners should be able to identify the incompleteness within texts which necessitates that the learners understand that no past event can ever be adequately retold or represented. The final point of effective historical reading of sources allows learners to recognise that there may be conflicting views in the text. Perfetti *et al* (1994) and Wineburg (1991; 2001) concurred regarding the issue of historical literacy encompassing historical skills and concepts. The four-point guide of reading sources proffered by Perfetti *et al* was similar to Wineburg's idea of heuristics. However, both approaches are central to the idea of knowledge construction through source analysis. Hence historical literacy was more than merely the written word or the one-dimensional comprehension of words; it was an amalgamation of historical knowledge and historical skills to attain historical understanding (Perfetti *et al.*, 1994). The reading and interpretation of

historical texts is a core skill for source analysis and historical literacy (Wineburg, 2001; Perfetti *et al.*, 1994). Historical literacy was facilitated through Wineburg's heuristics and Perfetti *et al.*'s points for successfully reading and using sources which could be further elaborated on for historical literacy to include learners acting as historians would, when interpreting sources.

History educationists who did not subscribe to the concept of historical literacy argued along similar lines to those of the historical literacy theorists, but without using the term. Wilson (2001) and Haydn *et al* (2003) are scholars who review the purpose of studying school history. They discuss critical factors of history education mentioned by historical literacy theorists. Therefore to create a greater awareness and conceptual understanding of the concept of historical literacy, they are worth reviewing. Wilson (2001) identified three core attributes evident in the teaching of history, which are similar to the ideas purported by Wineburg (1991) and Perfetti *et al* (1994). Firstly, the role of factual knowledge is necessary in establishing a platform for the learners to ground themselves. Furthermore, learners should not view historical facts as stagnant or static. Secondly, interpretation and evidence is vital to interrogate the so-called facts and finally, chronology and continuity clearly are historical concepts learners need so as to understand the location and background of the event as well as to have a personal and informed view thereof. Wilson therefore believes, like Wineburg (1991; 2001) and Perfetti (1994), that learning history is more than the mere acquisition of facts; it requires the application of skills as well (Wilson, 2001).

Haydn *et al.*'s (2001; 2003) research is integral to understanding more of the categories of historical literacy. Like Wilson, Haydn *et al* argued that the exposure and skills of dealing with historical concepts is integral to learning school history. They propose that studying school history is essential to provide pupils with an understanding of concepts such as time and chronology. This entails that time from prehistory to modern-day connotations of time be explored in order for learners to obtain a sense of "deep time" and

recent history. This exploration is necessary so as to fully appreciate the concepts of time and chronology (Haydn *et al.*, 2003, p.97). In addition to historical concepts, Haydn *et al* (2003) signified the magnitude of assimilating and comprehending the personal value of what learners are learning and the impact it has on their lives. Even though Wilson and Haydn *et al* were not historical literacy theorists, their theories are crucial to understand the concept, since their arguments support those of historical literacy theorists.

A significant and momentous contribution to the theorisation of the concept of historical literacy was developed by Taylor (2003). The significance of Taylor's work was that he created a historical literacy index which highlighted the key historical literacy concepts necessary for being considered historically literate. Taylor's historical literacy index was a product of the context within which Australia was questioning the use and purpose of history education in the new millennium. An inquiry was headed by Taylor to investigate the diminishing benefits and failures of school history and its implications in schools and for learners, in Australia. The outcome of his investigation was an accumulation of a complete historical literacy index whereby historical literacy could be measured.

In order to come to an understanding of what the term "historical literacy" entails, Taylor (2003) adapted a definition of an existing literacy, namely scientific literacy, to determine what historical literacy could mean. Taylor used his adapted description of scientific literacy to bridge a characterisation of the concept of historical literacy. He identified historical literacy as "... a systematic process with a particular set of skills, attitudes and conceptual understandings that mediate and develop historical consciousness" (Taylor, 2003, p. 2). He branded two factors which were imperative for achieving an understanding of historical literacy, namely: "The first task is to identify historical events and history's conceptual tools for dealing with them. The second task is to define historical syntax so that all students will find this



learning useful and empowering.” (Taylor, 2003, p. 4.) Historical literacy therefore could be seen as knowing historical content and providing the skills and necessary content to deal with the past. Secondly, using the appropriate content, skills and concepts would facilitate a process of understanding the past which would lead to a sense of personal empowerment for the learner. Taylor’s research also provides a concrete and thorough meaning for the concept of historical literacy,

First, historical literacy is not about a purposeless knowing of facts about the past. Historical literacy is about personal, social and political empowerment. Understanding the past is an important part of life as a whole, not just school life, and all school students are *entitled* to study history. Second, historical literacy must be based upon a judicious balance between social expectations about what students should know about history and individual understanding and skills. Third, the argument here is that all students may attain some of these outcomes at some time or other and that some students may attain them all. But it is highly unlikely that all students will attain all of the outcomes (Taylor, 2003, p. 5).

According to Taylor (2003), a learner should be able to, on account of being historically literate, employ the historian’s craft through the use of historical reasoning, synthesis and interpretation to explain historical events. This mode of arguing was synonymous with Wineburg’s depicted process of reading history and interrogating sources so as to act like a historian (1991; 2001).

Taylor’s use and introduction of the historical literacy index was groundbreaking as it documented a theoretical concept in practical terms. Upon debating the benefit of a historical literacy index, Taylor identified four key factors proposing the need for a historical literacy index with which to measure and facilitate historical literacy. Firstly, Taylor contended that in order to comprehend “literacy”, one needs to understand the reason why there are so many historically “illiterate” learners and what this even entails. Illiteracy, in

this case, refers to learners who are not historically literate as per his historical literacy index. The notion of illiteracy is paramount to understanding historical literacy; moreover what determines illiteracy so as to counter this phenomenon. Secondly, the need for a historical literacy index is imperative to dismiss the uncountable and vague uses of the term so as to have a concrete and thorough understanding of the term. Thirdly, the index will aid teachers in being able to recognise and facilitate historical literacy. Finally, Taylor argued that another positive implication for the existence of the index will allow for history teachers to work within an accessible and “recognisable pedagogical framework” (Taylor, 2003, p. 3). Through the use of a pedagogical framework one could use Taylor’s ideas as a checklist to create a certain kind of historical literacy as well as a method of measuring the concept.

Taylor’s historical literacy index was characterised by twelve vital components which conceptualise historical literacy. These twelve historical literacy categories could be grouped according to seven common categories related by theme, namely:

- knowledge of the past;
  - knowing and understanding events of the past
- historical skills;
  - narratives of the past
  - research skills
- historical explanation
- historical concepts
  - causation and motivation
  - making connections with the past
  - moral and value-judgements

- contention and contestability
- historical language
- representational expression
- science and Informations and Computer Technology (ICT)-understanding
  - using science to understand history
  - using ICT-understandings to research and construct arguments

The first theme of Taylor's adapted historical literacy index accounted for the role the past plays in a learner's life and could be broadly seen as knowledge. Taylor (2003, p. 6) used the classification of "events of the past" as his first factor for historical literacy which supported the ideas as seen by Ravitch (1989) and Rabb (2004) that prior knowledge and content is vital. Previous content knowledge was crucial for "knowing and understanding historical events" (Taylor, 2003, p. 6). Learners were required to know and understand historical events and subsequently understand the importance thereof to be considered historically literate.

The knowledge and application of historical skills could be depicted as the second thematic goal to attain historical literacy. Taylor (2003) was comprehensive about the factors encompassing historical skills. "Narratives of the past" explained how learners were required to understand and employ historical skills to comprehend the past in terms of investigating multi-narratives. The role of the teacher herein was to adopt a holistic approach to facilitate historical thinking in terms of learners understanding change and continuity over time. In addition, an analysis of multi-perspectives from a variety of sources was essential to determine the narrative of the past. Thereafter, through the analysis of the past and examination of sources, this specific criterion of historical literacy was satisfied, namely the realisation that

the “truth” would never be ascertained (Taylor, 2003, p. 10). A methodical understanding of narratives, through the exploration of historical skills, constituted a component of historical literacy. Another category of historical skills was the use of “research skills” (Taylor, 2003, p. 11). To be considered historically literate, learners should be able to understand how historians construct history. A historically literate child, according to Taylor, needs to act as a historian by gathering, interpreting and analysing primary and secondary sources. Research skills elicit problem-solving skills, comprehensive skills and inference or predictive skills. Thereafter, through an understanding of the discipline’s requirements, learners should be able to make an informed decision to elicit a portion of historical literacy. Taylor (2003) drew on source analysis models from Husbands (1996) to evaluate sources by accrediting certain questions for interrogating sources. Thus historical skills are a core component of historical literacy, as argued by Taylor. Learners need to be able to reason, synthesize and interpret sources to explain historical events. Wineburg’s (1991) use of heuristics is similar to Taylor’s historical explanation. Ultimately, historical understanding gives rise to a partial form of historical literacy.

A common thread of the term “understanding” wove throughout Taylor’s historical literacy index. The idea of “historical explanation” is a complex process that is necessary for historical understanding (Taylor, 2003, p. 36). To reason historically, learners have to fulfil four attributes which employ historical reasoning,

It [historical reasoning] requires a combination of reason and imagination based upon a foundation of evidence. It requires a level of understanding that is beyond a mere ability to deconstruct. It must have an external logic in that the explanation relates to the evidence in a way that follows established patterns. It must have an internal logic in that the assembly of evidence and its relationship to explanation must be convincingly argued (Taylor, 2003, p. 37)

A vital component of historical literacy is the goal of developing historical consciousness. Understanding of the past, through factors of historical literacy, ensures that learners use their historical consciousness to develop a conceptual framework within which to evaluate the past as well as society (Taylor, 2003). "Making connections with the past" was a necessary factor for historical literacy in that it ties in with Taylor's idea of historical literacy facilitating personal empowerment and the aspect of historical literacy for a learner (Taylor, 2003, p. 31). Taylor's historical literacy index advocates that learners need to bridge the past with their current situation to make sense of the past. Conflicting and controversial issues must be dealt with so learners understand their local past as well as their situation globally. Taylor argued that historical understanding and consciousness ultimately lead to a sense of personal empowerment for a historically literate learner.

In addition to Taylor's (2003, p. 6) other historical literacy criteria, "historical concepts" are crucial for historical literacy. Historical concepts are vital for historical understanding. Knowledge of "causation and motivation" is key to reviewing and making sense of the past (Taylor, 2003, p. 6). In addition, Taylor isolated other historical concepts of empathy, time, significance, difference and similarity which are vital to facilitate historical literacy. Taylor (2003, p. 26) used Ashby, Lee and Dickinson (1997) to attribute the importance of empathy in contextualizing oneself with the past. Empathy is a critical factor for historical concepts as it covers a number of other historical concepts (Taylor, 2003). Empathy analyses human action, understands a historical context and time, uses a number of interpretive historical skills and thereafter constructs an independent narrative. A follow on from empathy is the idea of "moral judgements in history" (Taylor, 2003, p. 35). Learners, according to Taylor, cannot simply criticise or judge historical characters from a modern ethical, cultural and moral framework. Learners have to develop skills and caution in applying contemporary moral judgements to the world of the past in terms of assessing historical events and historical accounts. The concepts of moral and value judgements regarding the past can be classified

as historical concepts as learners are required to distance themselves from the past and subsequently critique the historical event or human action. Moreover, they have to employ the concept of empathy before judging. This process is somewhat reliant on historical skills to investigate the context or scenario from the past. Similarly, the importance of time is equally important for understanding school history as it is central to Haydn *et al's* (2003) theory of time for a learner to chronologically order and interpret past events. The concepts of time, causation and effect are instrumental to historical literacy. In addition, Taylor proposed another historical concept of “contention and contestability” in that learners are mandatory to identify and account for various historiographies and their surrounding debates (Taylor, 2003, p. 31). Learners are required to use historical skills and concepts to ascertain the merits and possibilities of public historical debates surrounding a certain issue or to understand the inherent controversy or conflict which may prevent such an action (Taylor, 2003). Historical concepts is a vital component of historical literacy.

Very often history is inaccessible to learners based on the fact that language is foreign, in the sense that it is removed from their modern situation, or the historical language used in the past has altered in meaning. Taylor's (2003, p. 22) historical literacy index argued that the “language of history” is crucial for historical understanding. The language of history refers to the terms and concepts used to represent the past in terms of process, places and actions. The historical literacy index identifies problems concerning the language used in primary sources which ultimately affect the use of sources, skills and concepts. Language used in sources can potentially be outdated or “archaic”, use too many technical terms or is convoluted in its delivery (Taylor, 2003, p. 23). The solution to the problems language may pose, lies in the hands of teachers. Teachers should be able to identify potential language threats and eliminate such sources or explain them carefully to the learner. Similarly, when choosing textbooks or sources, teachers should be mindful of checking language usage.

Taylor's historical literacy index approaches the facet of using modern techniques to research and investigate the past through "Representational expression" (Taylor, 2003, p. 33). History may be understood through media, art, television, movies, music, graphs, newspapers, documentaries, media presentations, the internet and role-plays. Taylor (2003) warned that this method of history teaching is essential but must not lose its historical merit. A possible means of redressing this problem was through the careful use of historical skills and concepts to ensure appropriate historical understanding (Taylor, 2003).

The final common trend to emerge from Taylor's historical literacy index is dynamic in the sense that it broadens the use of traditional skills and source analysis by incorporating the use of "ICT understandings" and "applied science in history" (Taylor, 2003, p. 29; 36). The use of ICT to investigate and verify information is a new trend emerging in history education. Similarly, the use of science to factually verify information is a skill to be employed in historical research in that it provides a new dimension of investigation.

Taylor's (2003) historical literacy index is thorough and comprehensive. Unlike his predecessors' theories, Taylor's historical literacy index is a holistic approach to historical literacy by covering content, skills, concepts, historical understanding, historical language, representational expression and personal empowerment. Furthermore, he provides a means for teachers to measure historical literacy. His historical literacy index includes seven major criteria for historical literacy. As seen above, it is essential for learners to expose the many dimensions facilitating historical literacy. Knowledge of the past is vital for a learner, which requires a sense of content knowledge. Historical skills are required to construct knowledge and question the past. Historical explanation is crucial to every factor of historical literacy as learners have to

have historical understanding to achieve meaning in any of the historical literacy index's dimensions. The use of historical concepts is key to ensure historical understanding. Subsequently, the goal of the historical literacy index is personal empowerment for a learner studying history (Taylor, 2003). This aim occurs when learners can make a connection with the past and truly understand human action as well as their current situation. A possible inhibiting factor for the achievement of historical literacy is the problematic use of historical language in sources. Finally, Taylor's (2003) historical literacy index is modern in the sense that he advocates that media, art and science should be used to provide a worthwhile learning experience and allow all children of all intelligences an opportunity to become historically literate. Taylor's historical literacy index is groundbreaking for the realm of historical literacy as it provides a concrete and thorough exploration of the concept of historical literacy.

The most recent proponent of the concept of historical literacy is Lee (2004). Lee's research attempted to develop or attain an idea of what the concept of historical literacy actually is. This research builds on the ideas already developing on historical literacy. Lee's research is partly inspired by Rösen's theoretical approach to historical consciousness as well as pertinent empirical information relating to what historical literacy may seem to suggest (Lee, 2004).

Lee's research exposed a conflict regarding historical literacy. The debate concerned what learners should be taught regarding history and what they should be able to achieve and do. On the one hand educationists argued that historical skills and understanding of the discipline is more important than learning content, whilst another group argued that learning historical knowledge is more beneficial than skills and understanding. Simplistically, the clash in ideas, according to Lee, comes down to what learners know versus



what learners can do, which encapsulates the arguments of Ravitch (1989); Wineburg (1991) and Perfetti *et al* (1994).

Lee cited Rösen, to enlighten the argument pertaining to the point of school history. Historical consciousness, according to Rösen, as cited by Lee (2004), is all encompassing of history playing a practical role within the learners' lives. Historical consciousness revolves around the past and the present and links what learners know and can do as a result of their past (Rösen, as cited by Lee, 2004). Rösen's concept connects history, as a discipline, with real life. He believes that historical consciousness is a tool to be able to facilitate everyday life with oneself. "Historical learning cannot just be a process of acquiring history as 'objective facts'; it must also involve historical knowledge beginning to 'play a role in the mental household of a subject'" (Rösen, as cited by Lee, 2004, p.2). This quote entails that the discipline requires cognitive processes which involves the use of skills, concepts and content to satisfy the nature of the subject. Furthermore, an initial requirement for historical literacy is that learners should have an affiliation for or knowledge of what the discipline of history necessitated (Rösen, as cited by Lee, 2004, p.2). Lee's (2004) research provides an alternative perspective of historical consciousness to that of Taylor's in that historical consciousness is necessary to achieve historical literacy. Lee asserts that in order to attain a workable concept of historical literacy, one has to understand core elements comprising the orientation of historical literacy. This entails detailing what factors are necessary to ensure and facilitate historical literacy.

Lee's view of the teaching and learning of history implies that a learner's identity may be created through analysis of personal life experiences. Thus a requirement of historical literacy is that knowledge must be functional and useful within the learner's life,

A first requirement of historical literacy is that students understand something of what history is, as 'an engagement of enquiry' with

its own 'identifying marks, some characteristic organizing ideas and a vocabulary or expressions to which it has given specialised meanings: 'past', 'happening', 'situation', 'event', 'cause', 'change' and so on" (Lee, 2004, p. 3).

This would further imply that historical knowledge is valuable in conjunction with historical concepts (time, cause and effect), and moral implications culminates in historical literacy. This line of argument is central to the theories of Wineburg (1991), Perfetti *et al* (1994), Hayden *et al* (2003) and Taylor (2003). Lee's idea confirms that of Taylor (2003), namely that historical literacy implies personal empowerment on the part of the learner.

The argument presented by Lee concluded with him stating that historical literacy requires knowledge of the past together with the discipline's skills and how historians organise knowledge. Lee (2004) argues that historical literacy does not just evolve in isolation; key requirements are necessary to achieve historical literacy. To be considered historically literate, learners need an "intellectual toolkit" to promote historical understanding/consciousness and subsequently historical literacy (Taylor, 2004, p. 9). If the learners are equipped with an "intellectual toolkit" for coping with historians' disagreements they might attain historical literacy. The notion of an intellectual toolkit is similar to Taylor's view of a historical literacy index as a means of determining, describing and measuring historical literacy. However, the toolkit remains undeveloped in comparison with Taylor's holistic historical literacy index.

Lee's view of historical literacy is vital to the understanding of the concept as he perceives it as a competency which is forged from interaction with the discipline's requirements. His arguments are based on the ideas purported by other historical literacy theorists, namely Ravitch (1989), Wineburg (1991), Perfetti *et al* (1994), Taylor (2003) and Rabb (2004).

The literature pertaining to historical literacy revealed that historical literacy is an evolving and growing concept. Furthermore, historical literacy is a complex process with a number of conceptual competencies and factors facilitating the concept. Historical literacy describes key proficiencies that are gained through studying history. In addition, these vital expertise (of historical literacy) ensure success and benefits within the discipline of history. Historical literacy embodies historical content knowledge. However, it is not the sole recall of information that one could master to illustrate the competency of historical literacy. Historical literacy is a process wherein historical content knowledge is reviewed and interrogated in conjunction with historical sources and documents in order to make historical meaning and achieve historical understanding. The process of scrutinising content with a variety of sources is integral with historical literacy. Moreover, it is the historical skills and concepts necessary for the analysis of sources that are critical for historical literacy. Therefore historical content knowledge as well as historical skills will ensure historical understanding and, more importantly, historical literacy. In addition, modern theories on historical literacy such as ICT-understandings and representational expression are essential factors for historical literacy. Historical literacy is multi-disciplinary and provides learners with a holistic insight into the discipline.

### **3.3 Working towards a conceptual framework for historical literacy**

The conceptual framework for this thesis was developed after reviewing key historical literacy theorists in order to come up with a conceptual model of historical literacy for my study. The literature review illustrated a number of aspects regarding historical literacy. All of the historical literacy theorists demonstrated that historical literacy is facilitated and acquired during the school years. However, the divergence in the thinking among the theorists is

determined by what historical literacy entails and what historical literacy tools learners should acquire.

A common and important factor necessary for historical literacy is the significance of content knowledge. Wineburg (2001), Taylor (2003) and Lee (2004) argued that learners do not need to learn and know every fact or explain and detail every single event in order to facilitate historical understanding. Skills and concepts, together with historical content, are necessary to embody the true meaning of historical literacy. Wineburg (1991) detailed the construct of heuristics to fully utilise sources. The concept of heuristics was also used by Perfetti *et al* (1994) to validate their argument that sources are vital for contextualising a particular argument. This viewpoint was unlike that of Ravitch (1989) and Rabb (2004), who asserted sole content knowledge as being synonymous with and paramount for historical literacy.

Historical understanding and historical consciousness are other key components of historical literacy advocated by Taylor (2003) and Lee (2004). Historical consciousness details the conceptual framework of the subject, which could be used to infer and make historical meaning. Subsequently, historical literacy evoking historical consciousness elicits a sense of personal empowerment as it provides a framework within which to function in society and effectively use the historical tools available to them. Moreover, learners can make useful links with the past.

Subsequently, the most significant milestone in the advances of the concept of historical literacy concerns Taylor's historical literacy index which details key criteria, as discussed previously, regarding historical literacy.

The conceptual framework was based primarily on the ideas of Taylor (2003), but was also influenced by Ravitch (1989), Wineburg (1991), Perfetti *et al* (1994) and Lee (2004). The conceptual framework is integral to the study as it assisted me in ascertaining silences and gaps within the data. Taylor (2003), based on the fact that his historical literacy index is detailed and descriptive of proficiencies for historical literacy, was central to the literature review in that he binds the ideas advocated by other historical literacy theorists. All facets of historical literacy as argued by him are represented by what other historical literacy theorists advocate. Taylor's view of historical literacy is similar to Lee's (2004) in the sense that they both argue for a "checklist" with which to measure historical literacy, as well as learners feeling personally empowered as a result of being considered historically literate. Furthermore, both Lee and Taylor purported the benefit of historical skills to make sense of the past. Taylor's historical literacy index describes the use of a variety of sources to contextualise and understand the past. This notion of historical skills and historical content is synonymous with that of Wineburg (1999) and Perfetti *et al* (1994). Wineburg asserted that the three heuristics of sourcing, collaboration and contextualisation are essential for historical literacy. Finally, Taylor's outlook on historical literacy does not negate the idea of "learning" history, which is what Ravitch (1989) determined as being essential for historical literacy. Rather, Taylor views historical literacy holistically which entails that historical skills are necessary to decode messages to understand the historical knowledge. Taylor's views of historical literacy encompass the ideas of the other historical literacy theorists and his historical literacy index is essential to this study.

The choice of title for the analytical instrument, namely Toolkit for Historical Literacy, is based on Lee's (2004) use of the term "intellectual toolkit" for being considered fully historically literate. I preferred this title to Taylor's historical literacy index as I am of the opinion that an intellectual toolkit encompasses all factors necessary for historical literacy. The categories of historical literacy are largely based on Taylor's classification of historical

literacy. The first criterion deals with events of the past, which entails that learners are expected to know and understand that the past was reconstructed on subjective facts. Furthermore, historical literacy proposes that knowledge and depiction of the past is constructed from a number of narratives, which forms the second category. Thirdly, Wineburg (1991), Taylor (2003) and Lee (2004) all explored the idea of the historian's craft without specifically advocating it as a separate component. I feel this category is essential for historical literacy as every action and decision undertaken in the discipline forms part of historical enquiry which is essential for being considered historically literate. In conjunction with the category of the historian's craft, Wineburg's concept of heuristics (sourcing, corroboration and contextualisation) covers all of the historical literacy theorists' perspectives regarding historical sources and historical skills. The idea of historical concepts is vital for the Toolkit for Historical Literacy as it explores key historical concepts of time, cause and effect as well as change and continuity necessary to facilitate historical literacy. Taylor's (2003) notion of ICT – understandings is critical for the historical literacy index as learners in the modern day context have to employ the use of ICT sources to construct historical meaning. The concept of historical consciousness was explored by Lee (2004) in his discussion of historical literacy. Historical consciousness is achieved by being considered historically literate in the areas of linking the past, present and future as well as making connections with the past. Historical literacy implies understanding when professional and/or public historical debate is appropriate and applicable in the form of contention and contestability (Taylor, 2003). The Toolkit for Historical Literacy does not just focus on a minority of intellects. Multiple intelligences were acknowledged in the Toolkit for Historical Literacy by exploring history through art and the media in representational expression. Similarly, the use of science in history holistically allows learners to view history through the use of science. The final component of the Toolkit for Historical Literacy is moral judgements in history. This factor of historical literacy dictates that learners should not make value judgements before fully knowing the past. Empathy is an essential component of this section. Historically literate learners should be able to develop a moral

and ethical framework based on what they have learned. The analytical instrument is used to analyse the data after the application of open coding and discourse analysis to engender a deeper theoretical understanding.

**Table 3.1 The Toolkit for Historical Literacy**

<b>Historical literacy criteria</b>	<b>Sub-category</b>
Events of the past	Knowing and understanding that the past is constructed of subjective facts
Narratives of the past	Understanding history is constructed from multiple narratives
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)
Historical concepts	Cause and effect Time Understanding change and continuity over time
ICT – understandings	Using and understanding ICT-based resources
Historical consciousness	Linking the present/past/future Making connections with the past
Contention/contestability	Public and professional historical debate
Representational expression	Understanding history through art and media of the past
Moral judgements in history	Empathy Developing a moral and ethical framework of the past
Applied science in history	Use of scientific methods to analyse history

## CHAPTER FOUR



## RESEARCH DESIGN AND METHODOLOGY

### 4.1 Introduction

This chapter aims to describe, explain and substantiate the study's research design, chosen methodologies and sample groups. The methodology was explored in terms of its proposed process of how it was executed and implemented with regard to the data collection and generation. In addition, the strengths and weaknesses of the methodology, sample group and research design were thoroughly explored.

research process followed three-phases so as to answer the research questions posed. The progression of the phases of investigation was essential as it initially traced historical literacy within the South African history curriculum, namely the National Curriculum Statement for Grades 10 – 12 (General) for History (2003), the perceptions of the interpreters – (history textbook authors) of the curriculum and their opinions of the purpose of school history which was a metaphor for historical literacy, to finally ascertain the type of historical literacy found in selected Grade 10 history textbooks.

The analysis of the NCS - history was the initial mode of research enquiry. I felt an analysis of the NCS - history was vital for the study as it is the government-proposed curriculum as to what history education entails and what the learners should know and be able to achieve. However, the point of viewing the historical literacy of the NCS - history was to better understand the context the history textbook authors functioned in. Therefore the study of the NCS - history was to obtain a brief perspective of the spirit of historical literacy in the NCS - history. This, in a sense, was the historical literacy

advocated by the DoE. Thereafter I electronically corresponded, as part of the next phase of the investigation, with history textbook authors to ascertain their perspectives concerning the purpose of school history. I sent emails to 29 history textbook authors of whom 7 responded with the intention of participating in my study. It was critical to the study to review the authors' views of school history as they are the people who ultimately delivered the chapters found in South Africa's history textbooks. Moreover, their outlook on school history espoused a certain type of historical literacy which was necessary to fulfil the purpose of this study. The final phase was a critical examination of a selection of Grade 10 history textbooks. History textbooks were interrogated as the final product which should encapsulate both the NCS – history and the interpretation of the said document by the textbook authors to discover what kind of historical literacy was espoused therein. Throughout the mentioned phases the conceptual and methodological framework, as explained earlier and as embodied in the Toolkit for Historical Literacy, was applied to compare and contrast the nature of historical literacy as located in the history textbook authors' responses and in the selected history textbooks. This phase of investigation satisfied my final research question of identifying what kind of historical literacy was espoused by Grade 10 history textbooks.

Throughout the chapter, considerations of the limitations and strengths of the chosen methodology and research design were contemplated and fully dealt with. In addition, thoughts of how to address these weaknesses were investigated and implemented.

This thesis is located in the field of historical literacy, which provided the theoretical and conceptual framework for my study. The analytical instrument developed for this study was derived from the literature pertaining to historical literacy. The analytical instrument, namely the Toolkit for Historical Literacy, is based on the theories of the major proponents of the concept of historical

literacy, namely Wineburg (1991), Taylor (2003) and Lee (2004), as reviewed in Chapter 3.

## **4.2 Research design**

Plotting one's research design is essential as it is a means of systematically planning the research stages (Rugg & Petre, 2007). At the same time, the choice of research design is essential for the success of a particular type of problem (Mouton, 2001). One could liken the research design to a map. It is essential that all aspects of the trip are understood in order to reach the desired outcome, namely successful research and the answering of the research questions posed. Mouton examines three key criteria for the importance of a clearly understood and defined research design. Firstly, the research design is essential for the researcher as it provides a focus on the end product of the study. Furthermore, a research design is vital in allowing for a point of departure into the study and means of data analysis. Finally, an effective research design forces the researcher to concentrate on the logic of the research; moreover which kind of evidence is required and the best means possible to analyse. Following Mouton's (2001) typology of research design types, my research was a qualitative study wherein primary and secondary data were firstly collected and subsequently analysed.

The concept of qualitative research was explored by Mann and Stewart (2000) as they acknowledged qualitative research as having many forms, methods as well as a range of meanings, which makes it suitable to a number of varying studies. The fact that qualitative research afforded a variety of means and methods made it applicable to this study as differing forms of data analysis were undertaken from the NCS - history to the history textbook author responses and finally the selected Grade 10 history textbooks. Mann

and Stewart referred to Silverman and Brannen (2000, pp. 2-3) when they explored the role and nature of qualitative researchers:

Qualitative researchers use multiple methods to collect rich, descriptive, contextually situated data in order to seek understanding of human experience or relationships within a system or culture. Processes of analytical induction from the data might then lead to the formulation of simple explanatory hypotheses or, using systematic approaches such as grounded theory, the development of complex theories.

Ambert *et al* (1995) provided numerous reasons for researchers to embark on qualitative studies. They identified and discussed three core criteria for a successful qualitative study. Firstly, qualitative research is aimed at analysing a smaller sample so as to maximise the quality of information. This was vital for my study so I could minimise the possibility of having a huge sample with less intimate knowledge of the subject sample. Secondly, qualitative research is beneficial in that people-behaviour and subsequent actions or trends can be closely interrogated. And in the last instance, qualitative research can be linked and transferred over a number of levels and sample groups (Ambert *et al.*, 1995). O’Flaherty and Whalley (no date) echoed the sentiments expressed that qualitative research is a key framework for data collection, data reduction and data display which are vital to thorough research. Potter (2002, p. 56) also furthered the case for the use of qualitative research because “... of the rich insights it provides into problems which are not well understood.” These facets are vital for this study, as qualitative research, together with the use of an interpretive paradigm, dictates necessary guidelines with which to best collect and illustrate contextually rich data. Thus qualitative research has inherent benefits for this particular study as it provides a workable framework wherein a systematic approach can be afforded to the rich, contextually bound data from the NCS - history, history textbook authors and the selected Grade 10 history textbooks.

On the other hand, the use of qualitative research poses possible challenges, which I needed to remain mindful of when conducting any research. Qualitative research has the potential of being biased or one-sided if I did not contextualise the study or the researcher is prejudiced by being narrow-minded. Potter (2002, p. 160) provided a clarifying perspective to this argument by saying that "... it [qualitative research] cannot be done in an 'objective', neutral disengaged manner if it is to yield any worthwhile insight into the informant's world." In my case, this study was essential for both my personal quest of enquiry and my professional capacity as a teacher. Thus the study provided worthwhile insight. However, when engaging with the data, I purposefully guarded against allowing my beliefs and/or preferences to subjugate any outcomes or to make ungrounded assumptions.

For my particular study it could be generally understood and assumed that meaning was constructed by the NCS - history and the authors of history textbooks together with the world wherein they function and engage. Thus the assumption of the interpretivist paradigm suggested that "humans make sense of the world based on their historical and social perspective" (Opfer, 2008, p.10). Moreover, part of the world these role-players functioned in, was determined and constructed by the NCS - history and the history textbooks they use for Grade 10. It was for these reasons of interpretation and the evaluation of data, within the qualitative framework, that the choice was made to ground this study in an interpretivist paradigm. Furthermore, this choice was made, since a qualitative and interpretivist research paradigm provided a systematic approach to what was required of the study. In addition, working in an interpretivist paradigm allowed me, as the researcher, to be introspective and mindful of contexts and situations (Kelly, Lesh & Baek, 2008). Subsequently the interpretation of the outcome of the research was shaped by the researcher's own experiences and backgrounds, which in this case, would be my perspectives and beliefs. The choice of an interpretivist paradigm for this study was vital for inferring meaning from the data in order to make sense of the world I function in as well as the role history textbooks

play. In addition, based on the fact that meaning had to be interpreted during the three phases of analysis, the best paradigm to understand and account for hypotheses was the interpretivist one.

The possible weakness of using qualitative research methods in making biased assumptions was addressed by the fact that divergent data, namely the NCS - history, history textbook author responses and the selected Grade 10 history textbooks were analysed within the interpretivist paradigm. Using the three phases of research ensured a solid vantage point to interpret data which ruled out the possibility of making generalised and personalised assumptions (Mouton, 2001).

In qualitative research, interpreting the data was imperative in order to ensure the purpose of my study was met. According to Maedar *et al* (2006), qualitative researchers study phenomena in their natural settings in an attempt to understand or interpret occurrences in terms of the meanings people attach to them. Furthermore, the evaluation and explanation of the data was essential to understand what kind of historical literacy was manifested in the selected Grade 10 history textbooks.

### **4.3 Methodological challenges**

The eventual aim of my study is to ascertain how historical literacy is manifested in Grade 10 history textbooks. In order to identify this ultimate goal, I had to briefly interrogate the historical literacy found in the NCS - history as well as the perspectives of history textbook authors with regard to historical literacy. Thus Grade 10 history textbooks were the final progression of historical literacy. Therefore it was imperative to review and investigate the methodological implications of history textbook research. It was crucial for me, as the researcher, to be conscious of the potential barriers

to history textbook research. The outcome thereof was an awareness of the methodological challenges and the scarcity of history textbook methodologies that could be applied to my study.

The fact that there were no specific standards or methodologies to evaluate history textbooks posed difficulties for history textbook research. As a result of there not being one acknowledged set of explicit requirements, specific criteria or guidelines with which to evaluate a school history textbook, a deficiency concerning research in history textbook methodology was implied (Nicholls, 2006). Nicholls (2003, p. 16) elaborated on this predicament: "In the field of textbook research, methods used to analyse texts are rarely discussed clearly and in depth. Sometimes the analytical methodological quality of research varies immensely." Nicholls (2006, p. 1) concluded that history textbook methodologies were severely "underdeveloped and in need of further research."

Bourdillon (1990) in turn identified core areas wherein school textbook analysis was lacking with regard to research. Firstly, she concurred with Nicholls' finding that there was no one determined means for analysing textbooks, which led to a deficiency regarding history textbook research methodologies. Moreover, there was no one sufficient didactic or methodological means of analysing textbooks. Secondly, the empirical limitations of the history textbooks could not be determined as there was no means to review the actions of teachers and learners after school hours. According to her,

"(t)he methodological limitation lies in the fact that we do not have a set of reliable methods and instruments for the measurement and assessment of investigations in the field of schoolbook research and for the development of the necessary categories (Bourdillon, 1990, p. 22).

Guidelines for the collection of data in history textbooks were researched and provided by Mikk (2002). Mikk (2000, p. 77) defines the analysis of textbooks as the “(c)ollecting of data about textbook characteristics using explicitly stated rules.” This argument was a critical guideline for the methodological impasse as he provided a specific set of guidelines for history textbook research, based on clearly guided parameters. He argued that the evaluation of certain elements of the textbooks should be conducted through strict rules. Mikk further contended that this process could be subjective, but analysts had to strive to obtain relevant and reliable data. He argued that textbook analysis is essential in ensuring their possible benefit and “efficacy” before they are used in schools (Mikk, 2000).

A different perspective on history textbook methodology to Mikk’s was provided by da Cruz (2005). He argued that generic textbook methods share dissimilar characteristics and forms to those of history textbooks and cannot be used for critiquing a history textbook. Generic textbook research methodology does not take into account the discipline of history’s criteria with which to function. Historical skills and content are discipline-specific and thus require unique research. In order to successfully appraise history textbooks, explicit criteria are needed to fully investigate a history textbook (da Cruz, 2005).

Löfström (2009), in his doctoral research, exposed another shortfall of existing history textbook methodologies. He asserted that there has been too much of an emphasis placed on content in history textbook studies and not a sufficient exploration of skills and activities. As was seen in the section on South African history textbooks in Chapter 2, section 2.3, content analysis dominated the landscape of history textbook studies, despite some calling for more emphasis to be placed on historical concepts and skills, for example. Löfström’s (2009) research was enlightening as to what aspects of history textbooks could be investigated and a valuable impetus to my study.



A different methodological challenge regarding history textbook research was identified by Saele (2009), namely the role the researcher plays and the nature of the textbook in question. Saele (2009, p. 1) argued that participants undertaking history textbook studies often criticise content, topic choices and bias instead of "... asking the question of how and why the textbook content turned out as it did." In the light of the fact that my ultimate phase of analysis was the interrogation of a history textbook, it was important to bear in mind that the textbook is a product of an existing process and not an independent body of knowledge. It followed that the path of a curriculum is part of a systematic process which is integral to the interpretation of a history textbook author's opinions and subsequently used to investigate its final product, namely the Grade 10 history textbooks. This study presented by Saele was vital to my study as it reinforced the benefit of my kind of research in that the importance of the study was exposed, since the history textbook is the final product of the relationship between the NCS - history and the history textbook authors in terms of the envisioned historical literacy.

There were a number of methodological shortfalls regarding history textbook research in South Africa. History textbook research mostly analysed the content within textbooks so as to review the nature of the governing power or to understand the governing society. For this study I negated the possibility of conducting a content analysis of topics as I chose to use sections of the history textbook that in my estimation would best reveal the issue of historical literacy. I used the preface, jacket cover and three purposively selected activities per history textbook. In addition, I was mindful of using explicit criteria from the analytical instrument and to follow a systematic process when conducting my data analysis so as to best yield rich data.

#### **4.4 Methodology**

## **Sample**

### **NCS - history**

The first data source selected for this study was the NCS - history for Grades 10–12 (2003). In order to reach the stage of evaluating what kind of historical literacy was manifested in Grade 10 history textbooks, it was essential for the history curriculum, as espoused by the DoE, in the form of the NCS - history (2003), to be examined. The intention of this data source was to better understand the spirit of the NCS - history's historical literacy so as to understand the confines and environment of the history textbook authors. Henning (2004) stated that the collection of documents was vital for qualitative research as they may prove to be the most informative means of data in order to fully ground and locate the study. This brief examination was imperative to gauge a fundamental understanding of the nature and purpose of school history and what kind of historical literacy was envisioned by the DoE within the NCS - history curriculum.

It was vital that a policy document was interrogated as Ornstein (1994) asserted that textbooks ultimately drive the curriculum, and history textbooks are born from a curriculum. Therefore the nature and requirements of the NCS - history potentially determined to some degree the historical literacy embodied in Grade 10 history textbooks, thus a brief review of the NCS - history was necessary. The sections I focused on were Chapter 2 (NCS - history, 2003, pp. 9 – 15) and Chapter 3 (NCS - history, 2003, pp. 16-23) of the NCS - history (2003, pp. 9-23). There were several reasons for me to choose these chapters as the sample from the identified curriculum document. The definition of the term "history", as interpreted by the DoE, was necessary to understand the view of the discipline as identified by the NCS - history. Furthermore, the scope and purpose of the subject, as discussed in

Chapter 2, also proved necessary to assess the idea of the discipline as outlined by the NCS - history. I felt that the definition together with the scope and purpose from Chapter 2 would prove fruitful for my study. Chapter 3 was essential to follow as it outlined the means for measuring historical literacy, namely the Learning Outcomes (LO) and the Assessment Standards (AS) for history. The LOs and ASs determine the core characteristics which narrowed the NCS - history's tool of history to attainable goals. LO 1 depicted enquiry skills. LO 2 characterised historical concepts. The third outcome explored knowledge construction whilst the final outcome described the area of heritage. In turn each of these LOs had descriptors, namely ASs, detailing how the LOs could be met. Ultimately, Chapter 3 was essential to the study as it broke the factors that the NCS - history view as being essential to the discipline into manageable chunks. Another reason why I chose to use Chapter 2 and 3 was to rule out the possibility of getting stuck doing a content analysis instead of ascertaining what ideological and practical requirements the NCS - history envisioned for historical literacy. I felt these two chapters provided a concrete base to ground my study on in order to provide the platform for the history textbook author responses as well as for the history textbooks.

The inherent strength of the choice to use the NCS - history was that by limiting it to two chapters out of the entire document, I was able to better understand the espoused ideology and philosophy as purported by the NCS - history. This brief critique allowed me to understand the gist of the spirit of historical literacy. The rest of the NCS - history curriculum dealt with content to be covered which was superfluous to my study. Another benefit of conducting the study of the identified sections of the NCS - history was that it provided a solid grounding of the context history textbook authors work in. Overall, the NCS - history could be crudely seen as the starting point for historical literacy. Moreover, the NCS - history provided a functional context for the study which Mouton (2001) asserted is necessary for qualitative research.

A possible weakness may be that I only selected two chapters. However, with my examination being rigorous of the said chapters and in line with my topic, a comprehensive view of the nature of historical literacy became evident as it focused on the possible historical literacy within the NCS - history. Another potential weakness was that the document could not be understood in terms of its context and subsequently, I as the researcher, interpreted the data at face value (Mouton, 2001). The document, namely the NCS - history, functioned within a given context, and to overcome this challenge, I as the researcher acknowledged this fact and accounted for the NCS - history in terms of its given framework and discourse. Moreover, the importance of reviewing the NCS - history was to obtain a context of the environment of the history textbook authors.

### **History textbook authors**

The second data source for this study was the responses from Grade 10 history textbook authors. It was vital to interrogate the authors' responses, since these are the people who are responsible for the generation of the history textbooks. Moreover, the investigation of history textbook authors was essential to identify the envisioned type of historical literacy that eventually makes it into classrooms in the form of history textbooks. Most importantly, the history textbook authors were the bridge between the NCS - history and the Grade 10 history textbooks and were therefore integral to my study to eventually ascertain the type of historical literacy found in Grade 10 history textbooks.

The authors of Grade 10 history textbooks currently being used in history classes were approached via emails. In total 29 history textbook authors were approached of whom 7 responded. The electronic survey covered all of the authors of the Grade 10 history textbooks currently available on the market. I was not selective in terms of excluding any authors as I compiled a list of all of the authors from every textbook I could obtain by gleaning their names from the covers. Thereafter I endeavoured to contact them. The aim of gathering

the input from as many authors as possible was to review a variety of answers and replies. Furthermore, the purpose of the electronic and communicative survey was to gauge what history authors deemed the purpose of school history to be – a metaphor for teasing out what they deemed historical literacy to be. In addition, the ultimate goal of the electronic survey was to ensure a purposive sample which would render rich data.

There were a number of strengths in using an electronic survey. The choice to use an electronic survey was largely related to time. The use of emails entailed that responses and communication was less time-consuming. In addition, the respondents and I as the researcher were not delayed by the potential problem of distance, as communication was instant. Surveys could be delivered, accurately and with proof rather than the traditional use of the Post Office which may perhaps be a lengthy wait for the researcher and participants respectively. Similarly, respondents were afforded the opportunity to consider their responses without feeling harassed or pressured to complete it or answer the survey question immediately. Thus their answers were candid and not prompted. Respondents also had the opportunity of not being hindered by me, as the researcher, badgering them with questions or an intimidating presence or inhibiting participants to speak freely. The survey sample was relatively small as not all the history grades were being covered – only the Grade 10 phase – as it is the origin of the FET phase. Rugg and Petrie (2007) argued that a larger sample for surveys was not necessarily better as researchers retrieve quality answers of substance from smaller and better designed surveys. Other factors ensuring the decision to use an electronic survey deal with cost-implications, data analysis and response rate (Barribeau *et al.*, 2005). Making use of electronic media was cheaper than paying for postage and printing. In addition, the return of the electronic data was easier to manage, code and sort as it is a matter of copying and pasting as opposed to transcribing and typing the data. Mouton (2001, p. 153) affirms the strength of a survey as having an opportunity to “generalise” sample populations in relation to the texts. Barribeau *et al* (2005) in turn argued the benefits of using electronic surveys regarding response rates and level

participation. They asserted that early responses were possible as it was convenient for the participants. Moreover, Barribeau *et al* concluded by acknowledging that electronic surveys enjoyed a higher response rate as opposed to paper surveys as participants may potentially answer in minutes, within the same day or timeously.

Having time to ponder answers, on the other hand, could have been the greatest weakness of the use of electronic surveys as people could, by the same token, have time to deeply reflect and possibly “research” their answers which would also not be representative of their understanding of the purpose of school history. Furthermore, respondents may also not adhere to a given time constraint in order to return the received data or they may not respond at all. Similarly, Mouton (2001) also cautioned this kind of survey’s weaknesses as not having sufficient depth or the survey’s responses being “surface level”. Another weakness of the use of electronic survey is that it may limit respondents to those with access to computers and being online (Barribeau *et al.*, 2005). In addition, technology, no matter how *au fait* one is with it, there is always the possibility of errors. In spite of the high response rate, Barribeau (2000) and Rugg and Petre (2007) caution that this successful response rate is only in the first few days of the participants receiving it. Thereafter the rates dropped significantly.

With regard to potentially alleviating the weaknesses of an electronic survey, in terms of response rate, I provided a due date wherein it was reasonable for all surveys to return. If not, I attempted to contact the history textbook authors again via email. Similarly, I ensured that each email was adequately received by means of adding read receipts to my emails. Regarding the limitation or exclusion of possible members based on selection of textbook authors, I based my study on the Grade 10 history textbook authors as this is the first grade of FET history. I feel that by sending to all of the current Grade 10 authors, the sample is representative enough to gain valued insight into the view of the purpose of school history to better understand the nature of historical literacy within those history textbooks.

## History textbooks

The final data source, and also the key area of my study, was the interrogation of the Grade 10 history textbooks to identify the envisioned type of historical literacy. The three history textbooks I chose were textbooks that are readily accessible in Grade 10 history classes as authors and publishers readily provide free sample copies to schools in an attempt to advertise their product, so that teachers may buy it. My samples are textbooks which I regarded as having the possibility of yielding rich data and that have been passed by the DoE History Textbook Panel. In addition, the choice to use Grade 10 history textbooks specifically was after careful consideration. Due to the fact that learners only encounter FET history in Grade 10 – it is in effect, the first year of their journey of historical literacy – the choice was made to study Grade 10 history textbooks.

I chose to use three of the eleven Grade 10 history textbooks, as endorsed by the DoE History Textbook Panel, that I have access to. The three textbooks are:

1. Dugmore, Lekgoathi, Pape, Weldon & van Dyk. (2007). *Making History Grade 10 Learner's Book*. Sandton: Heinemann Publishers (PTY) Ltd
2. Dyer, C., Nisbet, J., Friedman, M., Johannesson, B., Jacobs, M., Roberts, B. & Seleti, Y. (2008). *Looking into the Past*. Cape Town: Maskew Millar Longman.
3. Govender, S., Mnyaka, M. & Pillay, G. (2008). *New Generation History 10 – Learner's Book*. Musgrave: New Generation Publishers.

The selection of the three textbooks was based on a range of texts that I am least familiar with in terms of my teaching practice, but are nevertheless widely used. This ensured a rich and purposive sample (Mouton, 2001). In addition, these history textbooks have varying activities, sources and content, which warranted the selection's strength. The greatest strength of my

selection was that I do not use any of these textbooks to teach. There is always that weakness in choosing or selecting any textbooks as it may be personal or preferred, but by choosing lesser known textbooks, to me, this prevented a biased approach. The reason why I felt that this was beneficial was because I did not want to be prejudicial to textbooks that I was familiar with and I would like to analyse data with “free” unbiased eyes.

Within the selected Grade 10 history textbooks I chose specific sections which I regarded as having the possibility of yielding varying and rich data and as providing diverse facets of the textbooks. I chose the preface of each history textbook as well as three purposive activities per history textbook and the jacket cover. The choice of using the preface was integral, as the preface determined the nature of the history textbook in terms of its goals, aims and descriptors. Bayer (no date) argued that the function of a textbook preface contains information written by the author to provide the reader with information pertaining to the contents within the textbook. Similarly, the preface was vital for scrutiny in my study as it featured the history textbooks’ scope, background and intentions of the authors regarding what to expect in the remainder of the history textbooks (Bayer, no date). The preface could also be seen as a personal outlet for the history textbook authors to address their readers directly. The preface is the place where the history textbook authors indicate what they intend to offer in the book; thus the initial starting point of the historical literacy they would impart within the history textbook.

The jacket cover was critical in determining the advocated kind of historical literacy. This could be seen as an advertisement that promoted what the textbook proposed and what made that history textbook worthwhile. The function of a jacket cover is to provide a succinct insight at the outset as to what the intentions of the publishers are. It is a commercial version of the publishers and authors’ intentions. This entails that the jacket cover, theoretically, advertises and endorses the historical literacy advocated within the history textbooks.



In addition, three purposively chosen activities were used which showed no preferences or partiality and allowed for an insight into the required skills and competencies to answer the relevant questions. Furthermore, the activities theoretically occur once the historical literacy has been facilitated. Activities are literally the driving force for historical literacy or to measure said historical literacy. In addition, the activities provide a platform to test the ideas of historical literacy from the NCS - history and the history textbook authors. The reason for my purposive selection of activities was to yield honest and unbiased data. A possible weakness of selecting activities may be biased. However, the fact that it was purposively surrendered candid data. Furthermore, activities were used to counter the methodological challenge of succumbing to a content analysis. The purpose of this study was to investigate the type of historical literacy envisioned within Grade 10 history textbooks, not to review content. Considering that this study is of a qualitative nature, any purposively selected activity should be a mirror of other activities in terms of historical literacy; thus it was unnecessary to do more than three activities. Therefore the choice of three history textbooks and three activities per history textbook was vital to ensure an editorial process which would ensure that uniformity prevailed. By including activities in my sample I aimed at determining what kind of historical literacy was imagined within the history textbooks.

The decision to choose these three categories was also to escape previous history textbook studies which solely focused on content rather than giving a holistic outlook on the textbook. The focus of my study was to ascertain what kind of historical literacy was found in Grade 10 history textbooks. In order to do that in a manner which yielded rich data, the preface, the jacket cover and three purposive activities per history textbook were chosen. Furthermore, the choice of these three sections from the data sources ruled out the chance of this study exploring content rather than the nature of historical literacy.

### **Data generation and analysis**

Since my study is located in an interpretivist paradigm within a qualitative framework, the use of open coding and discourse analysis was regarded as the most suitable of methodologies for the initial data analysis and data generation. Furthermore, data for this study existed in the form of the NCS - history and the Grade 10 history textbooks; thus it required data analysis, whilst data had to be generated for the responses of the history textbook authors.

For the investigation of the NCS - history, the history textbook author responses and the history textbooks, I felt discourse analysis and open coding would not only substantiate the data analysis and data generation, but provide a systematic means of evaluating and creating data in order to identify the initial manifestation of historical literacy therein. In terms of identifying the historical literacy in the NCS - history as well as in the Grade 10 history textbooks, the initial means of analysis I used was open coding to initially establish patterns, silences and trends regarding historical literacy. Furthermore, I also used Fairclough's (2003) analytic framework of discourse analysis to review the context of the discourse behind Chapters 2 and 3 of the NCS - history and of the Grade 10 history textbooks. In addition, the history textbook author responses were only interrogated using open coding. Thereafter, in order to establish and underpin a deeper theoretical meaning concerning historical literacy, a second level of analysis was conducted to identify the envisioned historical literacy from the history textbook authors and the Grade 10 history textbooks. This was conducted by running the data sources against the Toolkit for Historical Literacy.

Ultimately, the entire data analysis process was four-fold in nature:

1. Generation and analysis of data
2. Organisation of the data
3. Interpreting the data in the form of a written response
4. Theorising the data

I used discourse analysis, as argued by Fairclough (2003), to better understand the NCS - history and the Grade 10 history textbooks. Discourse analysis is a means of identifying how people make meaning in educational contexts (Rogers *et al.*, 2005). Rogers *et al* (2005, p. 370) cite Fairclough and Wodak who discuss key criteria of discourse analysis. Discourse analysis is ideological in nature as it consists of a study between society and nature. Similarly, within the discourse, there are power-relations which need to be discussed. Rogers *et al* (2005, p. 370) explored the nature of discourse analysis as well as the role the researcher plays in the methodology: "Discourse analysis is interpretive, descriptive, and explanatory and uses a systematic methodology. The role of the analyst is to study the relationships between texts and social practices." Furthermore, the differentiation between the text and the dialogue within the data can be deciphered using discourse analysis. For the purpose of this study "text" can be understood to be a textbook as well as the NCS - history and the response by the history textbook authors. This implied that the units of analysis, the NCS - history, the author responses and the Grade 10 history textbooks needed to be understood in terms of their background and the landscape they functioned in.

Mouton (2001, p. 169) stressed the strengths of a discourse analysis as emphasising discourse or dialogue in its natural settings which enhanced "construct validity" as well as credibility for the study. The phases of data analysis as outlined ensured that the history textbooks were placed in the context of historical literacy. Furthermore, Fairclough (2003) stated that the meaning of a text must be established from the context within which the text is delivered or produced. The text is a product of the processes of text production whilst discourse implies the process of social interaction with the text (Fairclough, 2003). On the other hand, Mouton (2001) highlights one of the greatest weaknesses of discourse analysis in saying that a limited generalisability is possible as this methodology is "context-dependent or context-bound."

Fairclough's analytic framework (as cited in Rogers *et al.*, 2005, p. 371) constituted three levels of analysis. This entails that texts need to be analysed in terms of interactions, relationships as well as social practices. Secondly, the text has to be interpreted in terms of the composition or general make-up of the discourse. A final component of discourse analysis, according to Fairclough, is that the researcher needs to offer a description or interpretation to account for the nature and manner of the discourse.

On the whole, the role of a discourse analyser is to identify, account for and discuss the voice behind the text. Ultimately, my research follows the course of discourse analysis as it is "(p)redominantly inductive [interpretive] and [makes] sense of 'chunks' of discourse" (Mouton, 2001, p.169).

Furthermore, I used open coding for all of my data generation and data analysis. Open coding allowed me to break the analysis of the samples into manageable "chunks" wherein the coding process was more manageable as well as the opportunity to store subsequent information. This was vital for data analysis whilst working with the NCS - history, the history textbook authors and the Grade 10 history textbooks. In conjunction with open coding, discourse analysis provided an awareness of the contexts within which I was working and also constantly provide a purpose to analyse the hidden discourse from the samples. Discourse analysis, as per Fairclough's analytic instrument, was used to investigate the NCS - history as well as the Grade 10 history textbooks (jacket covers and the prefaces). Open coding and discourse analysis comprised the initial means of analysis. Thereafter, the Toolkit for Historical Literacy was used to foster a deeper understanding.

The document analysis of the NCS - history was done by means of open coding and discourse analysis. This was essential so as to understand the responses from the authors and the historical literacy in the history textbooks; the NCS - history, needed to be thoroughly interrogated concerning its type of historical literacy. Chunks of data were reviewed, categorised and organised

so as to reveal common and/or dissimilar trends and silences regarding historical literacy. The NCS - history was also viewed in terms of discourse analysis, as per Fairclough's (2003) analytic instrument, as it is a political education document that needed to be understood in its context for my study. In effect this was analysing the discourse or hidden/covert meaning of the NCS - history to analyse its purpose in society. As mentioned before, document study was to better understand the spirit of the historical literacy within the NCS - history to better understand the history textbook authors' responses.

During the second phase of analysis, I investigated the participant responses' answers to my single survey question. My data generation was done by means of open-coding, wherein I gauged their understanding of historical literacy based on their responses. This involved isolating common trends and perspectives regarding historical literacy as well as accounting for the inherent gaps. I asked each of the authors their view concerning the purpose of school history. Thereafter, I ascertained whether there was a measure of comprehension or understanding regarding historical literacy, based on their responses. As established in the literature view, it was common practice for the textbook to be the "driver" of the curriculum, thus obtaining the authors' views of historical literacy which was essential to understand the kind of literacy put forward by the DoE and interpreted by the textbook authors.

Grade 10 history textbooks were initially reviewed via the means of open coding to expose the patterns and trends regarding the envisioned form of historical literacy within the preface and the jacket cover. Subsequently, I used discourse analysis to engender an understanding of the inherent dialogue covertly hidden within the Grade 10 history textbooks and the context within which they function. Information was grouped and categorised from the various chosen aspects of the history textbooks.

The data from the samples of the NCS - history, history textbook authors and the history textbooks was generated through the use of open coding.

During open coding, the researcher must identify and tentatively name the conceptual categories into which the phenomena observed will be grouped. The goal is to create descriptive, multi-dimensional categories which form a preliminary framework for analysis. Words, phrases or events that appear to be similar can be grouped into the same category. These categories may be gradually modified or replaced during the subsequent stages of analysis that follow (Hoepfl, 1997, p. 1).

For the purpose of this study, open coding worked best with discourse analysis as the coding of data was viewed in the given context as stipulated by discourse analysis. During the entire data analysis and generation process I had to be mindful of the facts that texts/samples are generated by people or institutions and therefore have a given context which affects how the information is interpreted (Fairclough, 2003).

Henning (2004) asserted that open-coding was the fracturing of content and/or data into a context of concepts and categories. The importance of the process of open coding is essential as codes are made up as the data is generated (Henning, 2004). Once the initial themes and patterns emerged from the data, data was then recoded in order to develop ideas for the final writing up of this study. Interpreting a document and storing the ideas that emerge from it required annotating, memo-ing, coding and reflecting about coding. Coding then became more systematic and thereafter was combined with reviewing and reporting on coding and using the ability to 'code-on' new categories (Bazely & Richards, 2000).

My role as the researcher required responsible organisation and management of the data in such a way that it could be systematically reviewed and evaluated. This mode of organisation was adopted for all subsequent data whilst bearing in mind the author and context of the text (Hoepfl, 1997). As stated earlier, open coding, as viewed by Dougherty (2007), was used to

decipher all of the samples, whilst discourse analysis was used in conjunction with open coding for contextualising the NCS - history and the Grade 10 history textbooks. For the latter, open coding was used primarily to identify the silences, trends and patterns. Thereafter the findings of the open coding were used within the realm of discourse analysis.

Open coding allowed me, as the researcher, to move beyond mere words and chunks of data to understand the bigger picture of phenomena and circumstances. Strauss and Corbin (as cited by Hoepfl, 1999, p. 1) referred to this process of re-examination of the initial codes as “axial coding”. The procedure of axial coding discussed and described causal events and detailed phenomena and accounted for possible phenomena. Eventually, the coding resulted in a conceptual understanding. Thereafter, this process of conceptualisation was transferred to a practical reality grounded in theory. Dougherty (2007) summarised the three-point coding process as firstly using open coding to identify possible categories for analysis. Secondly, axial coding was used to organise categories and voice properties or patterns from the data. Finally, “selective coding is the analytical process through which data are fractured, conceptualized, and integrated to form a theory” (Strauss & Corbin, as cited by Dougherty, 2007). This final process allows for the data and theory to merge. Dougherty argued that coding was more than mere word-pattern or word-count recognitions and that quality analysis of data through the use of the three points of coding will ensure quality outcomes.

A possible weakness of using open coding is that information may be generalised, supposed of being based on the assumptions purported by the researcher (Mouton, 2001). In order to counter this challenge, I remained mindful of the boundaries of discourse analysis wherein grounding the samples in a given context was imperative so as to understand and appropriately interpret the information.

#### **4.5 Application of the Toolkit for Historical Literacy**

The Toolkit for Historical Literacy was developed after a thorough and careful process of conceptualising the key theories of Wineburg (1991), Taylor (2003) and Lee (2004). The historical literacy theorists' accumulated views were thoroughly compared and/or contrasted to assemble a workable conceptual framework to use to with the aim to engender a deeper level of analysis. This framework was appropriately labelled "Toolkit for Historical Literacy", after the ideas of Taylor (2003) and Lee (2004). A detailed review of the historical literacy theorists can be found in Chapter 3.

The initial means of data analysis, via open coding and discourse analysis of the NCS - history and Grade 10 history textbooks and data generation of the history textbook authors, was instrumental in providing a solid foundation for the use of Toolkit for Historical Literacy. The findings of the envisioned historical literacy from the history textbook authors and the Grade 10 history textbooks were independently run through the Toolkit for Historical Literacy to expose silences, common ground and themes.

The version of historical literacy as espoused by the author responses (after having been informed by the spirit of the NCS - history) were compared and/or contrasted with Toolkit for Historical Literacy to ascertain any correlation or dissimilarity. The overall function of this data analysis was to view what type of historical literacy was envisioned among the participants, which was necessary for school history. Furthermore, the methodology employed was directly related to the theoretical location of the study, that being the realm of historical literacy.

The interrogation of the history textbooks was critical to the study as it provided the final culmination of the progression of the types of historical



literacy. The interpretation of the NCS - history's historical literacy and the input from the history textbook authors resulted in the production of the history textbooks and ultimately facilitated in determining what kind of historical literacy is found therein.

**Table 4.1 The research design**

<b>Research Questions</b>	<b>Sample</b>	<b>Methodology</b>	<b>Toolkit for Historical Literacy</b>
1. What kind of historical literacy is envisioned by	NCS - history (2003)	Open coding Fairclough's analytic instrument	No use of the Toolkit for Historical Literacy as only a brief

the NCS – history?			interrogation was needed to inform the background of the history textbook authors.
2. What do textbook authors of the Grade 10 history textbooks view the purpose of school history to be?	History textbook authors' responses to the electronic survey	Open coding	Yes
3. What kind of historical literacy is espoused by the Grade 10 history textbooks?	Three Grade 10 history textbooks	Open coding Fairclough's analytic instrument (prefaces and jacket covers)	Yes

The responses to the first two research questions can be found in the discussion in Chapter 5, whilst the response to the third research question is reported on in Chapter 6.

#### 4.6 Ethical Clearance

Before data could be collected and analysed, ethical clearance needed to be obtained from the UKZN's Social Science Ethics Committee (See Appendix A). This is in accordance with the rules and regulations of not only UKZN but also a necessary and recognised research practice.

It was vital with this study, as well as others, that I as the researcher had to be conscious of the position of the individuals that were assisting with the research. Researchers must be mindful of the individual's right to anonymity and privacy as well as the confidential nature of their involvement. Similarly, the rationale of the investigation has to be made explicit to the participants as well as their role within the realm of research. Participants have "(t)he right to

full disclosure about the research (informed consent)” (Mouton, 2001, p. 243). In addition, people must be assured of their rights not to participate in the study if they so wish. Furthermore, researchers must strive to ensure that their subjects are not harmed or made to feel uncomfortable in any way as a result of the participation (Roberts, 2003).

In order for research to be of benefit to society, researchers must conduct their research responsibly and in the light of the “moral and legal order of the society in which they practice” (Roberts, 2003, p. 13).

On a personal and a professional note, this thesis had to be grounded in theory and research with accumulated assumptions and conclusions surrounding the data, free of plagiarism, consultation with as many sources as are necessary and possible as well as maintaining appropriate referencing.

In terms of ethical clearance procedures, all Grade 10 history textbook authors who were approached were given consent forms to complete in order to assure them their right to anonymity, their rights to privacy as well as confidentiality (Mouton, 2001). Furthermore, the entire rationale of my research was explained to them in the covering letter (Appendix B) as well as the expectations of their participation and the option of not participating too.

All ethical procedures were considered and addressed through the use of the indemnity forms. This ensured that all participants could complete them and indicate their decision to participate in the study as well as provide proof of their willingness to participate or not. Furthermore, acceptance of the consent forms acted as a confirmation as to whether or not the research’s intention was understood.

#### **4.7 Research Journal**

In order to maintain a flow of ideas and continuity from day to day regarding my ideas and research in addition to recording valuable ideas, I chose to make use of a reflective journal. All field notes, information or ideas that I may need later were recorded in my research journal. This was especially helpful when writing up the chapters as there was a physically recorded means of progressing ideas from the start of this thesis until the end. Henning (2004) asserted the benefit of a research journal as an opportunity of having a chronological record of one's field and other notes. This makes the process of writing up the information much easier.

#### **4.8 Conclusion**

Throughout this chapter I outlined and discussed the research design and methodology used in this study. This was vital in order to break down and code relevant data in order to come to some understanding of the manifestation of historical literacy in Grade 10 history textbooks. Key research questions guided the choice of methodology as well as the research design. A qualitative research paradigm, underpinned by an interpretivist viewpoint best suited this research.

The study and review of methodological challenges, as identified in 4.3, was helpful to make me aware of potential shortfalls of my research. I overcame one of the most documented challenges, by not doing a content study of the Grade 10 history textbooks; instead I focused on the historical literacy therein with special reference to the NCS - history, the history textbook authors and specific sections of the Grade 10 history textbooks. In addition, I consulted with history textbook authors to review their opinions of school history too, so I gained an insight into history textbook authors' involvement in the process.

I followed the course of a qualitative study in which primary data was analysed. The phases of analysis were vital in order to understand the type of historical literacy envisioned within the sample. Thereafter, I used the Toolkit for Historical Literacy to create a greater and theoretical underpinning of the sample data. For the document study, open coding and discourse analysis were used and analysed in terms of the theoretical framework of historical literacy. Secondly, the author and editor responses were reviewed in terms of open coding in the light of the NCS - history's view of historical literacy. Finally, I investigated the Grade 10 history textbooks by using the Toolkit for Historical Literacy as well as open coding and discourse analysis. In addition, the limitations and strengths of each methodology have been reviewed, discussed and as a researcher I was mindful of them.

## **CHAPTER FIVE**

### **THE KIND OF HISTORICAL LITERACY ENVISIONED BY THE GRADE 10 HISTORY TEXTBOOK AUTHORS**

## 5.1 Introduction

This chapter aims at identifying what kind of historical literacy was envisioned by the generators of textbooks, namely the history textbook authors. The reason for approaching history textbook authors was that they are at the forefront of history textbook production in South Africa. History textbook authors are the midpoint between the NCS - history, the publishing industry and history textbooks. The interrogation of history textbook authors was vital to the study as they provided an insight into the ideas behind the generation of history textbooks. Moreover, this chapter's review of the responses of history textbook authors was vital for setting the scene for the following chapter wherein history textbooks would be analysed. Thus it was critical to initially analyse the history textbook authors' perspectives concerning school history in order to understand their outlook on the purpose of school history and thereafter ascertain their understanding of historical literacy.

For the purposes of fully understanding the context and background wherein history textbook authors function so as to eventually understand the Grade 10 history textbooks, a brief analysis of the NCS - history was necessary. This was indispensable for the full appreciation of the confines in which history textbook authors have to operate. This data analysis answered the first research question concerning the kind of historical literacy envisioned by the NCS - history. Data also needed to be produced for this chapter. In order to do this, an electronic survey wherein respondents were only asked one question was sent to 29 Grade 10 history textbook authors. This question was: "In your view, as an author of a Grade 10 history textbook, could you elaborate on your idea of what the purpose of school history is?" The rationale behind this question was for it to act as a metaphor so as to gain an understanding of what history textbook authors viewed historical literacy to be.

The analysis of the responses (data) answered the second research question concerning what history textbook authors view historical literacy to be.

The underlying principle of this question was to understand what the views of the textbook generators were regarding the purpose of school history. In this way I was able to, through the use of open-coding, identify their views of what they deem to be historical literacy. Open coding was used to establish common themes, patterns and dissimilarities regarding historical literacy. The open coding allowed for a first level analysis of the historical literacy espoused by the history textbook authors.

Once the views of history textbooks authors were determined by means of open-coding, a deeper level of analysis was required for the study. To achieve this, the Toolkit for Historical Literacy was applied in a four-fold manner. Firstly, the Toolkit for Historical Literacy was used to identify common factors denoting historical literacy between the history textbook authors' views and the literature pertaining to historical literacy. Thereafter facets of historical literacy identified from the history textbook authors, but which fell outside the realm of the Toolkit for Historical Literacy, were discussed. Thirdly, categories of historical literacy from the Toolkit for Historical Literacy, which did not feature in the findings from the history textbook authors' responses, were identified and analysed. Finally, the first three processes were used to come to a deeper conceptual understanding of historical literacy as per the views of the textbook authors so as to conclude the chapter.

### **A brief analysis of the NCS - history's version of historical literacy**

In order to proceed to the data generation and subsequent analysis thereof of history textbooks, a brief analysis of the NCS - history was required so as to provide a framework of the context wherein history textbook authors function. The NCS - history is a government-sanctioned document which prescribes the

history curriculum to be followed by the history textbook authors as well as the Grade 10 history textbooks. This process entails that both history textbook authors and the Grade 10 history textbooks must in some way mirror the ideals of the NCS – history in order to be endorsed by the DoE. Effectively, the NCS - history provides a specific context wherein history textbook authors have to function and it is this understanding of historical literacy that needs to be interrogated to fully appreciate the framework the history textbook authors have to operate in.

In order to view the specific kind of historical literacy engendered by the NCS - history, the spirit of this specific document was analysed from Chapter 2 and Chapter 3 to establish the gist of the NCS - history's historical literacy. This analysis provided the background and platform for the analysis of the history textbook authors' responses concerning historical literacy. The second and third chapter of the NCS - history was comprehensive and meticulous in detailing the benefits of the discipline, the purpose of the subject and a means of assessing the progression of a learner. These two chapters were best suited for understanding the context under which textbooks authors work as they provided the most appropriate data, since I did not wish to conduct a content analysis. The use of open coding revealed a number of key findings, common trends and exposed silences as to how the NCS - history viewed historical literacy. In addition, discourse analysis, as per Fairclough (2003), was used to better understand the inherent context of the NCS - history.

The second chapter of the NCS - history was explicit about the facets detailing and defining the discipline. These factors explored what the NCS - history views history to be and what dimensions and factors it encompasses. In addition, the purpose of the study was explored which stipulated what the NCS - history views the point of studying school history to be. The NCS - history (DoE, 2003, p. 9) defined history as



... the study of change and development in society over time and space. It also draws on archaeology, palaeontology, genetics and oral history to interrogate the past. The study of History enables us to understand and evaluate how past human action impacts on the present and influences the future.

The NCS - history dictates that learners should be *au fait* with and enriched by the historical concepts of cause and effect as well as by the effect of time and space. Moreover, the discipline's skills of oral history, archaeology, palaeontology and genetics are central to knowing and "doing" history. History, as viewed by the DoE, is all encompassing of promoting the historical features of the discipline. This definition of history was essential for understanding the gist of the NCS - history as it alluded to historical concepts, sciences within history and the role of human action.

In reviewing the purpose of history as imagined by the NCS - history, a number of trends and themes emerged from the coding process. The NCS - history promoted the ideas of empowering learners' capacity to allow them to make informed choices as well as to be equipped members of a democratic society (DoE, 2003). Furthermore, the NCS - history (2003) believes that the study of history is a means of extending this personal empowerment for learners to effectively understand and interpret human nature. By implication, as per the NCS - history, the implied means of historical literacy is that history fosters a sense of personal empowerment to enhance their role in a democratic society by engendering an understanding of human nature.

In order to fulfil the above-mentioned purpose of history, the NCS - history uses a three-pronged approach for the role of history to produce its form of historical literacy. Firstly, the NCS - history discusses the benefits of a rigorous process of historical enquiry. The NCS - history advocates that history must ensure the development of historical skills through the analysis of

multi-sources. Similarly, the subject promotes the identification and understanding of diverse points of view through the use of many sources. In addition, the NCS - history (2003) proposes that history allows learners to review occurrences or events from an informed and historical perspective. Whilst dealing with multiple sources, learners should also be able to deal with contradictory voices in history to fully achieve the purpose of the discipline. All of these criteria are necessary for learners to compete in a rigorous inquiry of history as espoused by the NCS - history. In addition, this rigorous enquiry is only possible if learners acknowledge the existence of multiple voices in sources and that the past is constructed from accounts containing varying agendas. Thus the implicit historical literacy is that learners become historically informed once multiple sources, with varying historical perspectives, have been interrogated.

The second means of fulfilling the purpose of the discipline, according to the NCS - history, is by using the subject in a way that fosters and furthers the country as well as its democratic values. This goal of achieving the purpose of history seeks to satisfy the goals of the government concerning history promoting the ideals of democracy. Through literacy of the discipline, the NCS - history (2003, p. 9) aims to foster an appreciation of the Constitution, “encourage civic responsibility and responsible leadership,” and to locate and educate individuals about their society, community, country and global situation. This implies historical literacy engulfs a political element from the NCS - history. The use of history to foster concepts of democracy, civic responsibility and to appreciate the Constitution revealed that the historical literacy, in the NCS - history, is to a certain extent political in nature, which is expected, as it is a curriculum document.

The third and final means of the purpose of studying history as presented in the NCS - history is the fact that the discipline is a medium to champion human rights. This discipline, as discussed in Chapter 2 of the NCS - history,

aims to ensure that learners are able to examine concepts of race, gender, ethnicity, prejudice and xenophobia. Moreover, learners should be able to identify and “listen to” minority voices and respect oral history as well as respecting indigenous knowledge systems (DoE, 2003, p. 9). As with the second function of the NCS - history, an implied use of political ideals is evident in the delivery and aims of the NCS - history. Overall, the NCS - history’s purpose seeks to promote skills development, a sense of societal functionality, and non-discrimination and attempts to build a moral capacity in individuals to address conflicting and contradictory information.

Thus the implied form of historical literacy, as revealed in the purpose of the NCS - history, fosters the use of multiple narratives to understand the varying perspectives used to construct knowledge. In addition, the historical literacy promoted by the NCS - history, has a political element to it and champions human rights and promotes democracy and other ideals from the government. Throughout each facet of the NCS - history, there is a reliance on skills development as well as conceptual understanding. There is a definite sense of satisfying political and governmental goals in the NCS - history.

The scope of the NCS - history encompasses history as part of the humanities wherein the human experience is foregrounded. The NCS - history asserts that history is a well-established discipline wherein particular historical skills, discourses, historical concepts and historical knowledge are integral to achieving success in the subject. The NCS - history likens the learners, who partake in the subject, to historians in the sense that they should act like a historian and adopt and use the relevant skills and insight,

They [learners] analyse sources and evidence, and study different interpretations, divergent opinions and voices. By doing so, they are taught to think in a rigorous and critical manner about society. Their work draws on and influences all fields of human endeavour.

This process is enriched by the application of historical imagination. Learners will increase their conceptual knowledge as a framework of analysis. Using this framework, they will interpret and construct historical knowledge and understanding and be encouraged to communicate this in a variety of ways (DoE, 2003, p. 10).

Inherent in the above quotation are measures of desired historical literacy from the scope of the discipline. Learners are required to adopt critical thinking, use a variety of sources and identify and account for biases within sources. Throughout this process, learners have to use historical concepts and the knowledge they have acquired thus far. This ultimately ensures that the learners can increase their conceptual knowledge in order to analyse historical information. Thereafter, learners can use that framework to interpret and construct new historical knowledge and subsequently communicate this new knowledge in a variety of ways. The scope of the NCS - history also details and counters the perceived notion of Western knowledge, ideals, linguistics, mathematics and sciences as crucial intelligences in favour of social sciences and indigenous knowledge. Thus the spirit of the imbued historical literacy is functional in terms of the historian's craft and hints at the study of indigenous knowledge which may perhaps be political in its rationale.

In addition to the scope and purpose of the discipline, the NCS - history argues that studying history at the FET level provides "sound vocational preparation for a wide range of jobs and careers" (DoE, 2003, p. 10). No specific jobs are mentioned, but the use of the skills and competencies engendered from the subject will, according to the NCS - history, allow for successful job applications warranting problem solving, analytical and critical thinking as well as orating skills (DoE, 2003).

The second chapter of the NCS - history (2003) culminates with an introduction of the Los, which are essential to success in the discipline. In

order to monitor and measure the extent to which the required historical skills and knowledge are achieved, there are four LOs to facilitate the progress. The LOs are to be used to complement one another and facilitate the holistic nature of the discipline. Theoretically, the LOs can be viewed as the spirit of historical literacy as these four outcomes dictate the historical literacy in terms of what learners need to be able to do for history to be assessed.

The manner in which the discipline functions and in which skills and concepts are measured, is explored in the third chapter of the document. The NCS - history (DoE, 2003) describes the LOs necessary to ensure mastery of the subject, history, and to measure relevant successes. The LOs are accompanied by ASs that are descriptors of skills and concepts for each LO carried over into the following year. The LOs together with the ASs can be seen to assess the amount and type of historical literacy mastered.

The LOs are competencies to fully evaluate the core features of the discipline. The first LO explores the issue of Historical Enquiry (Practical Competence). This LO describes the process wherein “(t)he learner was able to acquire and apply historical enquiry skills” (DoE, 2003, p. 11). This outcome prescribes that learners should be able to question the past using enquiry skills to filter and organise information as a result of a number of sources. By the time the learners reach the AS that details Grade 12 they “... will be expected to demonstrate an ability to work independently, formulating enquiry questions as well as gathering, analysing, interpreting and evaluating relevant evidence to answer questions” (NCS - history, 2003, p. 11).

The second LO is a progression from the first wherein a foundational competence is required from the learner. LO 2 – discusses Historical Concepts which illustrates the need for learners to use the acquired historical concepts in order to effectively analyse the past. This LO implies that a

learner can achieve an informed understanding of key historical concepts in order to analyse the past. Notions of change and knowledge of power relations are central to evaluating societies as well as understanding conflicting perspectives. Thereafter learners should be able to make an informed opinion backed by evidence. During the final year of the FET band, history learners are expected to be able to account for power relations, dynamics and change and complex societies through the conclusions drawn by historical concepts together with varying sources and perspectives.

The next competence in the sequence of Learning Outcomes is a reflexive competence - LO 3. This outcome is categorised as Knowledge Construction and Communication wherein “(t)he learner is able to construct and communicate historical knowledge and understanding” (DoE, 2003, p.13). Learners should be exposed to a variety of data and sources in order to synthesise information regarding the past in order to develop, create and argue an individual historical argument. The delivery of the argument can be written or verbal. However, it should be as reliable and authentic as possible. The succession of this LO, after a practical and foundational competence from LO 1 and LO 2, is key, since it allows the first two LOs to develop an argument whilst LO 3 allows for the presentation of the argument.

The final Learning Outcome, LO 4, details Heritage, which is also classified as a reflexive competence. This LO requires learners to be able to “... engage critically with issues around heritage” (DoE, 2003, p. 14). This outcome allows learners to engage with issues of heritage, be they public or private. To fully satisfy this part of the curriculum, learners should be exposed to diverse knowledge systems in their studies. In addition, learners are required to delve into the disciplines of palaeontology, archaeology and genetics in order to understand the origins of humans and how this has transformed present-day notions of race. In addition, a wide variety of knowledge systems are required to make meaning of the curriculum, in this LO. The NCS (DoE, 2003, p. 10)

asserts that no knowledge system is “static, but is dynamic, growing and changing in contact with other knowledge systems.” The NCS introduces indigenous knowledge systems for learners to be exposed to other forms or bodies of knowledge in an attempt to “transform the values of learners.” The final element of scope, according to the history NCS, is the exposure to varying and differing perspectives which will ultimately assist in problem solving across the curriculum and multi-disciplinarily.

Fairclough’s analytic framework (as cited in Rogers *et al.*, 2005, p. 371) revealed that the NCS - history is a manifestation of the DoE’s envisioned practices regarding historical literacy. The covert messages behind the NCS - history reveal that the NCS - history is political, to some extent, in its nature as it prescribed idealistic values of democracy, transformation and tolerance for different people. In addition, the NCS - history allocates an entire LO to facilitate this notion of redress of the past and the insistence on studying indigenous knowledge under the auspices of LO 4, namely heritage.

Overall, the historical literacy envisioned by the NCS - history could be characterised by the four LOs (historical enquiry skills, historical concepts, knowledge construction and communication as well as heritage). The NCS - history asserts that the purpose of studying history is for learners’ own growth to function effectively and informatively in society and in their educational environment. The success and achievement of the LOs and ASs facilitates personal empowerment (NCS - history, 2003). It is the enquiry skills, historical concepts, knowledge construction and heritage, that the NCS - history argues are necessary for personal empowerment. However, as stated, heritage and knowledge construction are underpinned by historical skills and concepts. Overall, historical literacy as espoused by the NCS - history is primarily dominated by enquiry skills, historical concepts and subsequently knowledge construction and heritage. In addition, encompassing the spirit of the historical literacy from the NCS - history is a definite political bias which is interwoven

throughout the LOs. Overall, Chapter 2 and Chapter 3 provide valuable insight into the scope, purpose and envisioned goals of the discipline which culminate in the Los, which is a practical means of measuring the desired historical literacy.

The brief insight into historical literacy, as espoused by the NCS - history, was integral to provide a backdrop for the review of history textbook authors. The DoE is the endorsing power with regard to history textbooks and the publication thereof; thus it was vital to identify the historical literacy from the NCS - history for subsequent analysis of the history textbook authors' responses.

## **5.2 History textbook authors' understanding of the concept of historical literacy**

History textbook authors' understanding of the concept of historical literacy is an essential part of the process in terms of identifying the type of historical literacy in Grade 10 history textbooks, as these authors are the generators of the said curriculum. Furthermore, this entails that history textbook authors are the bridge between the NCS - history and the eventual history textbooks. Therefore to fully satisfy the question pertaining to the kind of historical literacy manifested in Grade 10 history textbooks, data needed to be generated from the history textbook authors of those same history textbooks.

In order to generate data, I emailed an electronic survey to 29 authors of Grade 10 history textbooks. Furthermore, the choice of history textbook authors was limited to Grade 10 history textbook authors as Grade 10 is the first year of FET-based history. All of the history textbooks were passed by the DoE History Textbook Panel. From these history textbooks, I attempted to



contact as many history textbook authors as I could. I did not purposely leave out any history textbooks. I tried to contact all of the authors from the covers of the history textbook authors. Further motivation of the choice of data source can be found in Chapter 4 of this study (p. 88). In the electronic survey history textbook authors were asked the question pertaining to the purpose of school history. The idea of asking about the purpose of school history was to identify the inherent view of historical literacy. The metaphor for the purpose of school history detailed the history textbook authors' imbued form or understanding of historical literacy.

The application of open coding was vital for a first level analysis to categorise and identify common areas of historical literacy as exposed by the history textbook authors so as to gain an initial understanding of the envisioned view of historical literacy, whilst providing a solid platform for the final chapter.

### **Common trends from open coding**

The electronic survey covered all of the authors of the Grade 10 history textbooks currently available on the market. There were a number of common threads concerning the views of the purpose of school history. These threads centred on the ideas of the importance of school history for acquiring historical skills, the historian's craft, historical arguments, historical narrative, content knowledge and historical concepts. Thereafter minority categories deemed important by only some of the respondents such as historical consciousness, personal empowerment, author bias, and political motivation were also identified and explored. The responses from the history textbook authors were categorised and labelled as Respondent A, B, C, D, E, F and G respectively.

The most frequent discussion of the purpose of school history was the idea of the inculcation, acquisition and development of historical as well as general skills which could subsequently be transferred to develop life skills through the effective use of sources. Therefore historical sources could be seen as a vital component of historical literacy. All of the authors were unanimous in terms of attributing the importance of the fostering of historical skills in terms of synthesis, questioning, extraction, categorising, classification, interpretation, sourcing and construction of a historical argument from evidence. The history textbook authors argued that this was not only essential for school history only – the skills from history could be used in other disciplines too and in everyday life. Respondent A described historical skills as being essential for critical thinking. In terms of history this implies questioning motives, comparing and/or contrasting ideas or evidence. The evolution and acquisition of historical skills was largely portrayed and practised in the use of sources. An insightful theme concerning historical skills emerged from Respondents F and G wherein they both identified the crucial need for effective historical skills to decode and question the past. The true purpose of the discipline, for Respondent F and G, was to question the past through the historical tools/skills at their disposal. When questioning the past, Respondent E advanced the need for historical skills, elicited by Respondents G and H, to argue that historical skills were crucial for learners to examine the danger of single narratives. To exercise the use of sources, a variety of sources was crucial to the ultimate purpose of school history (Respondents). Furthermore, the process of selecting and organising information is essential in that it exposes learners to the “complex role” the historian has to fulfil (Respondent B). In addition to historical skills, the general skill of writing skills was necessary to present a historical argument (Respondents A - G). Most of the respondents went as far as saying that historical skills are synonymous with developing general life skills (Respondents A, B, D, E, F and G). Respondent E understood historical literacy in terms of fostering historical skills, as being vital in evaluating and identifying differing perspectives. Similarly, “(t)he skills [history] and concepts developed through this approach to history education are also essential life skills” (Respondent E). Therefore the case for historical

literacy, as advocated by the history textbook authors, was unanimous in terms of the paramount importance of using historical skills to interrogate sources and to subsequently make meaning.

A second trend that came to the fore by means of open coding was that learners have to interrogate multiple narratives to effectively understand the past. The use of varying sources is essential in order to understand multiple sources and by implication multiple narratives. Selected sources, in textbooks and by the teacher, must be relevant and authentic in order to better understand the time period (Respondent E). Respondents C and D felt it was imperative to ascertain the differences between primary and secondary sources, reliable and unreliable information and contradictory or multi-perspectives of a particular era in order to effectively understand evidence. Respondent B reiterated the importance of using sources in history,

The emphasis on a critical approach to sources, also gives learners some idea of the complexity of the historian's task and, if taught properly, this engagement with sources should arouse in learners a healthy suspicion of simplistic and glib interpretations of the past."

Respondent F concurred with the argument presented by Respondents C and D that in order for the true function of sources to be realised, learners should be exposed to a wide variety of sources pertaining to gender, class, race and differing perspectives. Therefore the inferred trend exposed by the authors in terms of historical literacy advocated an understanding of multiple narratives.

Another core component of historical literacy exposed from the responses, was the ability to develop a historical argument. Furthermore, this argument must be substantiated and thereafter presented either verbally or in writing. All of the respondents concurred that once the development of historical skills and the interrogation of skills are completed, only then can the argument be constructed. All of the respondents argued it is vital for historical literacy to

effectively analyse and synthesise information in order to comprehend content and construct arguments.

The large majority of the history textbook authors acknowledged a common trend concerning the idea of content knowledge as being a critical factor of school history. However, many of the history textbook authors elicited divergent opinions about the knowing versus the understanding of historical knowledge. This mindset entailed that some respondents attest to the importance of learners acquiring content knowledge whilst others viewed content knowledge as only being integral to understand, not know. Only respondents B and F attested to the value of historical content to satisfy and develop the purpose of school history. They believed that historical content knowledge grounds a learner in terms of their local history as well as the international situation. Furthermore, history education is about historical content knowledge. Respondents A and C in turn believed historical content has its place in order to understand historical periods, but its emphasis should not be all-encompassing. Moreover, understanding why something happened is more important than what happened. According to Respondent E, history education not only deals with narrative and content knowledge, it also involves concepts and historical skills, which means that knowledge cannot stand alone but is integrated. Likewise, Respondent G purported that historical content should facilitate an understanding of historical concepts concerning why something happened. On the other hand, Respondent D argued that knowing content is paramount as it is necessary to identify and account for biased perspectives. Overall, a few of the common themes from the respondents illustrated the feeling that historical content knowledge is vital for understanding school history, whilst the rest asserted that it is a key component of school history which needs to be facilitated in conjunction with historical skills and historical concepts. But there was a definite element of tension regarding the place of historical knowledge from the respondents, which was clearly manifested in their responses. The division was clearly expressed concerning increasing a knowledge framework as opposed to

knowledge, skills and concepts sharing an equal platform. Therefore the findings concerning historical content knowledge were two-fold. On one hand, respondents advocated the importance of content solely, opposed to a combined approach of content and skills. The other end of the spectrum exposed respondents who believed in historical literacy which included content and historical skills.

Some of the history textbook authors isolated the comprehension and use of first and second order historical concepts as being a crucial trend of school history as they promoted the spirit of better understanding human agency. First order concepts are those that assist learners to understand trends and patterns of history, such as the term “revolution”. Second order concepts, on the other hand, are directly related to the processes of first order concepts, e.g. analysing changes or effects of the revolution. Knowledge of first order concepts, according to the history textbook authors, such as the use of concepts of liberty, xenophobia, democracy, capitalism and communism resulted in historical understanding to describe and label past events and phenomena. Second order historical concepts, as explored and mentioned by Respondents A, E, F & G, were integral for the awareness of human agency. Respondent E affirmed the importance of second order historical concepts as he/she argued that they were responsible for developing a moral and ethical framework among learners. One of these second order concepts, empathy, was central to the responses as each author pointed out that the purpose of school history was to evoke human emotion as well as to be conscious of morals and values. Empathy was a common concept, expressed by the authors, to evaluate the past. In addition, using other second order concepts such as bias, reliability, validity, cause, effect, consequence, significance and limitations for source work ensured a historical understanding of the past (Respondent G). In addition, Respondents A, E, F & G isolated the notion of time to better understand the past and the present. According to the history textbook authors, historical concepts (first and second order) were critical for historical literacy for allowing learners the capacity to understand the

relationship between the past and the present so as to define and interpret the past in its relation to the present.

Another theme for historical literacy as exposed by the history textbook authors was the historian's craft. Some of the history textbook authors were adamant in their responses that the ultimate goal for a history learner was to fulfil the role of a historian and to implement and use the tools learned from the discipline (skills, content and knowledge construction). Respondent C acknowledged emphatically that one of the most instrumental purposes of school history was to "train" children to be like historians. During their years of studying the discipline at school, Respondent C furthered that learners had an opportunity of learning the historian's craft, during their FET years. Granted, learners may experience hardships regarding successes in the subject throughout their schooling career. However, by Grade 12 they should be capable young historians (Respondent C). Respondent G offered a divergent opinion concerning the role of a historian wherein he/she argued that after engaging in skills, knowledge and concepts, learners should be able to use the tools available to historians to analyse events and situations more in-depth. An example of this would be accounting for and examining different historiographies (Respondent G). Thus the purpose of school history, in terms of historical literacy, adopted by the respondents, was to foster and develop the craft of the historian in order to engage in the requirements proffered by the discipline.

The essence of historical literacy for a number of respondents was that school history should mete out a sense of personal empowerment and of being confident enough to participate in society. Respondent E described the purpose of school history in terms of personal achievement for a learner as follows: "History education is about narrative/content knowledge, conceptual understanding, interpretation and about skills and processes of historical enquiry that leads to learners writing their own 'piece of history'." Studying the

content or narrative, fostering a conceptual understanding, interpreting and using the skills culminates in a sense of freedom for the learners as they are empowered to write their history, understand their situation as well as acquire the confidence to evaluate historical periods. After studying school history, the function of the discipline, according to Respondents E, F and G becomes apparent in that learners identify who they are, their situation and location both in South Africa and globally. Respondent G concluded the argument by stating that the ultimate intention of school history is for learners to use the tools, skills, content and concepts they have learned and to practise the discipline of history in everyday life. Overall, the acquisition of historical literacy is vital for each individual learner to use the necessary historical tools to make sense of their own situation within a larger perspective and to empower them to use the tools advocated by historical literacy.

The issue of politics and history was sincerely acknowledged by two respondents wherein they asserted that author bias and content bias had the potential to indoctrinate learners. Similarly, in a South African context, content could be seen as racist (Respondent F). Respondent D was honest and forthcoming in his/her analysis of the purpose of school history. He/she argued that

(t)he purpose of school history in any country is partly to indoctrinate; to foster the concepts of nationalism as understood by the government in power, into the population. In addition it is to ensure that the history that is seen as important to the ruling group is remembered (Respondent D).

This quote implied the importance the discipline of history bears for the government, showing the challenge school history posed for learners if littered with stereotypes and generalisations. Furthermore, the overall implication for historical literacy, as exposed by Respondent D, is that school history has the potential to further the ideals of the government, and in doing so, possibly indoctrinate the learners.

Personal biases and author preferences was another category exposed by open coding to fully review the case of historical literacy from the history textbook authors' points of view. Respondent F, in particular, commented that history textbook authors have to be mindful of personal biases and prejudices before interpreting the curriculum to import into a history textbook. Therefore not only does school history have the potential to manifest the ideals of the government; it also provides a personal platform for authors to expose their preferences in the chapters they write (Respondent D). In addition to the potential infiltration of the NCS - history's version of historical literacy, historical literacy also has the potential to be swayed by author biases.

The final component and theme that emerged was the idea of historical consciousness. Respondent G used the term, historical consciousness to refer to historical understanding after the interrogation of historical skills, concepts and content. Historical consciousness evolves from studying the discipline and fostering a sense of personal empowerment (Respondent G). In terms of the true, theoretical underpinning of historical consciousness as explored by Rüsen, I do not believe that the use of this term fitted the history textbook author's intended meaning. However, Respondent G discussed it and acknowledged it nevertheless.

The common trends, as identified from open coding, of history textbook authors in response to the question concerning the purpose of school history, centred on historical skills, concepts and content. On the periphery of the core ideas voiced, were the factors personal empowerment, political indoctrination, author bias and historical consciousness. All of these factors could be translated to their view of historical literacy as well as to the tools necessary to employ the historian's craft.



## **Findings of history textbook authors' responses**

At the core of every single author response was the idea of historical skills. This was the only common area of responses that all respondents identified and emphatically detailed. The history textbook author responses advocated that historical skills were required to succeed in school history and every facet of the discipline. Skills were necessary for source analysis, deciphering and interpreting sources and concepts, constructing knowledge as well as achieving success in the discipline so as to empower learners. Historical skills were foregrounded as being the vehicle to function within, in terms of historical literacy.

Historical content knowledge provided a skewed response in that some respondents attested to its integral role within historical literacy whilst others had mixed feelings. A few of the respondents felt it was more important to understand why something happened in conjunction with historical skills and historical concepts than to know exactly what happened and other pertinent facts. On the other hand, some respondents felt that without a content framework, learners had no basis to clarify and verify information. Overall, there were sufficient responses to acknowledge the importance of knowing and understanding the past. Thus the case for historical literacy is that knowing and understanding historical content knowledge is important for historical literacy.

The use of historical concepts to make and infer meaning about the past was the final common and affirmed case for historical literacy. Knowledge and the understanding of concepts such as causation, effect, significance, chronology/time, the past and present are essential views of the history textbook authors which makes historical concepts key for historical literacy.

Historical concepts allow learners to build a conceptual framework to make and deduce accumulated historical meaning.

Upon analysing common trends among the author responses, an insightful and noteworthy comment was made by Respondent G. Respondent G cautioned authors to be constantly alert of author bias, background, views, beliefs and personal assumptions which play a critical role in history textbook production. Respondent G acknowledged that history textbook authors have to be cognisant of their own values and prejudices when writing a chapter for a history textbook. When writing a chapter, this awareness of potential manipulation should always be foregrounded. This concession was vital for the study as only one author admitted to being conscious of the fact that he/she had to constantly remind himself/herself to be mindful of his/her subjectivity and attempt to remain neutral. In reviewing the purpose of school history, the probability of history textbook authors perpetuating their one-sided perspectives and the potential to foster and purport the aims of the government is possible. Similarly, a peripheral purpose of school history/historical literacy identified by Respondents D and F affirmed that the overall purpose of school history is to politically indoctrinate learners regarding government ideals and goals. This directly informed the nature of historical literacy, as the type of historical literacy is dependent on the particular author or sanctioning body, in this case the DoE. Therefore the case for historical literacy implied that history textbook authors are not always aware of the potential bias yielded by them when writing chapters. In addition, the implied historical literacy is overtly government-prescribed, which means history textbooks are entitled to subscribe to it.

The final realm of historical literacy dealt with the term “historical consciousness”, as exposed by Respondent G, who specifically used the phrase. This respondent championed the importance of historical consciousness for historical literacy. This author was adamant that the

ultimate aim for history learners is to attain historical consciousness so as to function effectively, in society. Historical consciousness provided a conceptual framework within which to draw on past content, skills and concepts to use in a learner's everyday life. This notion of using history in everyday life is synonymous with personal empowerment. That is imploring the historian's craft of using the tools, concepts, content and skills for learners to use to solve problems regularly as well as account for the past. The study of history should allow learners to become informed citizens wherein they understand the world from a local and international perspective as well as account for and create a personal identity (Respondent F and G).

In categorising what type of historical literacy was envisioned by the history textbook authors, I determined that skills are critical for the case of historical literacy as espoused by the history textbook authors. Subsequently, historical content knowledge is the next requirement for historical literacy. Closely following suit of content knowledge is the understanding and use of historical concepts. The perpetuation of government-sanctioned goals and the implementation of author bias in history textbooks is another facet of historical literacy in that the purpose of school history to some degree elicits a particular agenda. The final idea for the case of historical literacy is the development of historical consciousness, by being "junior" historians, to effectively empower learners to become functional members of society. Subsequently, all of these factors for historical literacy encompassed the goal of a history learner to embrace and employ the historian's craft.

In terms of the context of the NCS - history and the history textbook authors, it was vital to identify common trends in an attempt to view policy compliance or a varying form of historical literacy to better understand the next chapter on Grade 10 history textbooks. The following historical literacy factors featured in both versions of historical literacy: the role of the historian in terms of advocating historical skills and using multiple sources and historical concepts

and developing a sense of personal empowerment. The debate concerning knowledge was foregrounded again. The NCS - history promotes knowledge construction from sources, through the use of historical skills and historical concepts, to understand a historical event. This perspective was partly supported by some of the respondents, whilst others advocated learning content to increase a knowledge framework so as to know and understand the past. In addition, a minority of history textbook authors realised the political nature of the role they played as interpreters of the curriculum which illustrated the potential danger the DoE wields in terms of purporting its form of historical literacy.

### **5.3 Use of the Toolkit for Historical Literacy to analyse the history textbook authors' views of historical literacy**

This first level of interrogation to expose the type of historical literacy was the application of open coding to expose common trends and themes concerning the envisioned kind of historical literacy from the various respondents pertaining to historical literacy. However, to come to a deeper level of understanding of what the history textbook authors viewed as the purpose of school history, i.e. what historical literacy is, their responses were compared with the generally accepted ideas of what historical literacy entails as embodied in the Toolkit for Historical Literacy. The use of the Toolkit for Historical Literacy aimed to identify a deeper conceptual and theoretical understanding of the history textbook authors' views of historical literacy so as to lay the foundation for the chapter on the manifestation of historical literacy in Grade 10 history textbooks (Chapter 6).

The process of using the Toolkit for Historical Literacy followed four patterns. Firstly, common factors of historical literacy between the history textbook authors and the Toolkit for Historical Literacy were identified. Thereafter,

categories of historical literacy which were only dealt with by the history textbook authors, and not the Toolkit for Historical Literacy, were discussed.

Historical literacy criteria	Sub-category	History textbook authors
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Thirdly, categories from the Toolkit for Historical Literacy, which did not feature in the responses from the history textbook authors, were isolated and explored. Finally, the above-mentioned three processes were used to come to a conclusion of the historical literacy envisioned by history textbook authors.

The Toolkit for Historical Literacy's findings in conjunction with the history textbook authors are displayed in the following table:

**Table 5.1: Positioning the Toolkit for Historical Literacy with the history textbook authors' views of historical literacy.**

Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• Knowing and understanding content is vital</li> <li>• Content is paramount to understanding a learner's position, locally and internationally.</li> <li>• To introduce learners to the fact that all information is biased.</li> <li>• To understand why something happened instead of what happened – less emphasis on content</li> <li>• History education is about content/narrative knowledge.</li> <li>• Content should facilitate an understanding of key concepts</li> <li>• Content is important. However, the emphasis should be on skills.</li> <li>• Question the production of historical knowledge</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• History education is about content/narrative knowledge.</li> <li>• To question the past and realise that single-narrative histories are dangerous.</li> <li>• Introduce learners to historiography and different versions of the past.</li> <li>• Question the production of historical knowledge</li> <li>• Foster the importance of historical interpretation and of accepting the differing perspectives in the past.</li> <li>• Awareness of artificial nature of knowledge construction.</li> <li>• Evidence from sources to verify knowledge construction.</li> <li>• The exposure to sources is essential to understanding the complex role of the historian.</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• Select relevant sources/evidence</li> <li>• Evidence from sources to verify knowledge construction</li> <li>• Exposure to sources (primary, secondary, visual and textual) in order to critically analyse the content and the creator of the sources.</li> <li>• Ascertain the difference between reliable and unreliable sources.</li> <li>• Variety of sources to construct an argument</li> <li>• Corroborate and contextualise - learners must engage with authentic sources to understand a historical period; therefore teachers and textbooks are paramount to finding the balance of opportunities.</li> <li>• Source analysis should cover gender, class, official accounts, personal accounts and diverse opinions.</li> <li>• The careful studying of sources is essential to</li> </ul>

		<p>exposing contradictory and/or multi-perspectives.</p> <ul style="list-style-type: none"> <li>• Synthesise information into a balanced, well-structured argument to a historical problem.</li> <li>• Back up views with evidence from sources</li> </ul>
Historical concepts	<p>Cause and effect</p> <p>Time</p> <p>Understanding change and continuity over time</p>	<ul style="list-style-type: none"> <li>• Understand the world today, i.e. the present</li> <li>• To understand that the present is shaped by the past.</li> <li>• Relevance, cause and effect</li> <li>• Discussed first order concepts which were not catered for in the Toolkit for Historical Literacy</li> <li>• To understand the relationship between the past and the present.</li> <li>• Link events of the past to the present</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Historical consciousness	<p>Linking the present/past/future</p> <p>Making connections with the past</p>	<ul style="list-style-type: none"> <li>• To understand the world today.</li> <li>• Conscious of changes over time and how views are a product of the time.</li> <li>• Develop a sense of historical consciousness</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Moral judgements in history	<p>Empathy</p> <p>Developing a moral and ethical framework of the past.</p>	<ul style="list-style-type: none"> <li>• Empathy – understanding human emotions/relations, care for humanity, awareness of ethics.</li> <li>• To develop a moral and ethical framework – compassion.</li> <li>• Accountability, integrity, compassion, generosity are important concepts to understand human action.</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>

The first historical literacy criterion concerning the events of the past was comprehensively dealt with by the history textbook authors. Overall, the combined response of the history textbook authors was that knowing what happened in the past was just as important as understanding the causes

thereof. Although there was a division concerning whether knowing or understanding was more important, in general, the history textbook authors agreed that an element of both was necessary. Furthermore, knowing about the past should be constructed from historical skills and historical concepts. Knowing historical content allows learners to understand their position locally and globally. Most importantly, the history textbook authors satisfied the requirements of this category of the Toolkit for Historical Literacy because they advocated that learners need to be introduced to the fact that all information and knowledge construction is biased in its nature and should therefore not be accepted at face value. Rather, content knowledge should be questioned, as advocated by the history textbook authors. Therefore in terms of knowing and understanding that events of the past are constructed from subjective facts, the Toolkit for Historical Literacy and the history textbook authors were similar in their intention.

The concept of history being constructed from multiple narratives is a vital component of the conceptual view of historical literacy as it accommodated the necessity for learners to realise that knowledge is constructed from multi-perspectives. The history textbook authors, in general, were adamant that learners should be cautioned to merely believe single narratives. This was important, as the history textbook authors described history education as being dependent on content and/or narrative knowledge. Moreover, learners should comprehend the danger of sole narratives and interrogate or question that notion. A potential resolution, proposed by the respondents for single narratives, was to introduce learners to historiography and the subsequent different versions of the past. In another response, a respondent proffered the importance of interrogating differing perspectives so as to counter single interpretations of a source. The Toolkit for Historical Literacy's sub-categorisation of numerous narratives was synonymous with the history textbook authors' view.



The historian's craft, in terms of source-work, is instrumental to the theoretical conceptualisation of historical literacy as well as the historical literacy advocated by the history textbook authors. The process of sourcing, according to the history textbook authors, is critical for historical literacy as learners have to be exposed to a wide variety of sources (primary, secondary, visual and textual). A large selection of sources is vital to verify knowledge construction (Respondents). The process of corroboration was detailed by history textbook authors illustrating the use of multiple and relevant sources to justify given accounts to ascertain the difference between reliable and unreliable sources as well as to critically analyse the creators of sources. The process of sourcing should cover evidence portraying gender, class, official accounts, personal accounts and diverse opinions. Once sourcing and corroboration is completed, only then can learners contextualise information to construct an argument. Learners have to therefore employ the role of the historian to construct knowledge. The reliance and importance placed on skills and source-work is reminiscent of the goals of the SHP to make history accessible and functional (Hayden *et al.*, 2001). Ultimately, learners have to employ the historian's craft to engage with authentic sources to understand a historical period. In terms of the historian's craft and the Toolkit for Historical Literacy sub-category of sourcing, contextualisation and corroboration, both forms of historical literacy matched.

Historical concepts were a criterion of historical literacy that was common to both the history textbook authors and the Toolkit for Historical Literacy. Understanding concepts of time, change and continuity are vital historical concepts for the attainment of historical literacy, as advocated by the sub-category in the Toolkit for Historical Literacy. History textbook authors argued that grappling with the historical concepts of time led to awareness and an acknowledgement, on the part of the learners, that the present is shaped by the past. This holistic comprehension of the historical concepts is dependent on learners interrogating the concepts of causation and effect and subsequently accounting for change or continuity. The history textbook

authors did not specifically separate first order concepts from second order concepts. First order concepts were discussed, by the history textbook authors, to better understand content, whilst the second order concepts reiterated the emphasis of concepts such as time, cause and effect. These second order concepts were used by the history textbook authors to illustrate the importance of learners linking the past and the present, and moreover, to understand how the present and modern day world is shaped by the past. Historical concepts facilitated the requirements of the Toolkit for Historical Literacy and the history textbook authors by reviewing the categories of time, causation and effect.

One of the respondents was emphatic about the term “historical consciousness”. However, he/she did not develop his/her understanding of the term. It was a given that he/she used the term to inform their writing of history chapters. The Toolkit for Historical Literacy explored historical consciousness as linking the past with the present and the future and learners thereafter making meaning with the past. History textbook authors stated that there is an inherent benefit of learners understanding the world they live in. This understanding is a culmination of being conscious of changes over time and how learners are a product of their time. However, this awareness was not labelled by any authors as historical consciousness. A sense of historical consciousness allows learners to effectively view the local and global situation they find themselves in, which subsequently leads to a sense of personal empowerment (Respondent G). Historical consciousness, as argued by Respondent G, fosters an identity for learners which ultimately develops a sense of personal empowerment for a learner. However, in terms of the Toolkit for Historical Literacy, the perpetuation of historical consciousness did not match nor was it used in the sub-category’s context of making a connection with the past.

Some of the respondents detailed historical literacy as an opportunity for learners to develop a moral and ethical framework. The history textbook authors satisfied this area of moral judgements in history as advocated by the Toolkit for Historical Literacy. This was achieved through the development of the concept of empathy which was mentioned and inculcated into numerous responses. Empathy was a key and common concept analysed by the respondents to develop a moral and ethical framework. The history textbook authors emphasised the importance of learners developing a sense of compassion for people and their actions from the past. This ability to morally judge the past was made possible through the historical concept of empathy (Respondents). In addition to empathy, a respondent argued that accountability, integrity and compassion are also needed to develop a moral and ethical framework of the past. A keen understanding of human emotions and/or relations, an awareness of ethics and a genuine care of humanity fosters development towards a moral and ethical framework, which is a core component of historical literacy, as advocated by the Toolkit for Historical Literacy, was also depicted by the history textbook authors. Therefore moral judgements in history is a common factor for historical literacy.

There was a definite area wherein the Toolkit for Historical Literacy differed from the respondents. The only dimension of the history textbook authors' realm of historical literacy which did not "fit" into the Toolkit for Historical Literacy was political indoctrination and author bias. The history textbook authors asserted that author bias and the incorrect use of history for political gain is an essential part of historical literacy. The application of history as a political tool and potential use of bias did not comply with the Toolkit for Historical Literacy. Furthermore, it is the history textbook authors who admitted that they willingly subscribed or not to the ideals of the NCS - history which dictate the pertinent ideals of democracy, nation-building and tolerance to further societal demands as part of the South Africa political landscape. Profoundly, some of the history textbook authors realised that they were working on a political document, namely a history textbook. However, the

emergent voice for historical literacy stated that the discipline is bound by politics and it is up to authors to subscribe or not.

Just as the Toolkit for Historical Literacy did not accommodate the area of political intentions from the part of the history textbook authors, so too did several of the criteria from the Toolkit for Historical Literacy not feature in the history textbook authors' responses. An anomaly occurred when discussing ICT-understandings. The history textbook authors made no mention of ICT-understandings in any capacity. History textbook authors hinted at learners using a wide variety of research skills and sources, but no prescriptive comment was forged for learners to make use of ICT to gather and verify sources or to construct knowledge. Therefore the area of ICT-understandings was not viewed by history textbook authors as a component of historical literacy.

Another discrepancy between the history textbook authors' responses and the Toolkit was the concept of contention and contestability. The historical literacy view purported by the history textbook authors did not consider this at all. A possible reason could be that history textbook authors aimed their chapters at learners comprehending the necessary demands of the discipline rather than bombarding them with higher order thinking relating to history.

The idea of representational expression was likewise not identified by the history textbook authors as it was with ICT-understandings. One respondent mentioned the use of graphics for diverse sources. However, on the whole the use of sources, collectively, summed up the idea of visual sources without being descriptive or elaborative. As with contention and contestability, history textbook authors may not have encountered the term "representational expression" or interrogated it. Furthermore, their view of historical literacy and the purpose of school history may be narrowed and reliant on the context

wherein they function and as purported by the NCS - history. As history textbook authors, they felt learners could find all of the historical literacy needed in their compiled history textbook instead of having to look for more modern dimensions of historical literacy. Due to contention and contestability as well as representational expression being relatively vague in its nature and the fact that media and art are never mentioned per se, this aspect of historical literacy therefore must be classified as a silence in terms of its non-compliance with the Toolkit for Historical Literacy.

The final category of the Toolkit for Historical Literacy which was not evident in the history textbook authors' responses was the notion of applied science in history. None of the history textbook authors detailed any importance to the use of applied science such as carbon dating, palaeontology, archaeology, DNA studies or genetic studies in history. As with contention and contestability, I feel this may be ignored by history textbook authors as it may be deemed superfluous or unnecessary, by them, for the learners to know and it may not be included in history textbooks. Another reason could be that they are unsure or ignorant of the existence of applied science in the realm of historical literacy. Either way, the use of applied science is a difference between the history textbook authors and the Toolkit for Historical Literacy. In addition, ICT-understandings, applied science, representational expression and contention and contestability are modern criteria for historical literacy, which history textbook authors, in South Africa, may be unaware of, or ignorant of.

In terms of the historical literacy espoused by the Toolkit for Historical Literacy and the history textbook authors, a number of common criteria were evident. The craft of the historian was foregrounded to reveal a preoccupation with the use of sources and its appropriate skills to successfully function as a historian. In addition, both views of historical literacy advocated knowing and understanding events of the past in terms of manufactured facts as important

for the case of historical literacy. When reviewing the past, historical literacy, on the part of the Toolkit for Historical Literacy and the history textbook authors, it became clear that learners have to be exposed to the nature of multiple narratives to foster historical literacy. The fourth common historical literacy criterion was the fact that historical concepts are important to being considered holistically historically literate. The use of the term “historical consciousness” was dubious in the sense that its use by history textbook authors was different to its conventional use according to the conceptual theorisation thereof. The final similar historical literacy criterion which both the Toolkit for Historical Literacy and the history textbook authors agreed upon was the ability of school history to engender a moral and ethical framework through the use of empathy. The issue of school history being dominated by political government ideals and the implementation of author biases in history textbooks did not feature in the Toolkit for Historical Literacy’s version of historical literacy, but it did feature in the historical literacy of the history textbook authors. Finally, there were a number of contrasting factors of historical literacy highlighted by the Toolkit for Historical Literacy which were not evident in the history textbook authors’ responses. The historical literacy criteria of ICT-understandings, contention and contestability, representational expression and applied science were absent from the respondents’ responses. This illustrated the fact that a more modern version of historical literacy escaped the history textbook authors or they were largely unaware or ignorant of the possibilities of a more representative form of historical literacy.

#### **5.4 Conclusion**

The DoE sanctions every history textbook that is used in South African classrooms. This entails that every history textbook author has to adhere in some measure to the requirements as stipulated by the government.

Moreover, the history textbook authors should, in theory, mirror and satisfy the DoE requirements from the NCS - history.

The history textbook authors offered a number of divergent and similar ideas purporting historical literacy, which was a metaphor for the purpose of school history. A common and defining characteristic of historical literacy for the history textbook authors was the idea of historical skills and the use of sources. Historical skills and sources were paramount in the sense that none of the subsequent actions within the discipline could happen if learners were not appropriately advanced in terms of these two components of historical literacy. This fixation on skills and sources is indicative of the remnants of the SHP. Secondly, differing opinions were offered regarding knowledge and the learning and understanding of past events. Some of the respondents advocated the importance of learning facts to increase a learner's conceptual knowledge, whilst others preferred a combination of knowing and understanding past events so as to facilitate historical literacy. Historical concepts was a third feature of the historical literacy advocated by the history textbook authors. History textbook authors argued that, without historical concepts, learners would not be able to develop a moral and ethical framework or understand subject-specific concepts. The role of the historian was another essential factor for the case of historical literacy as identified by the history textbook authors. In order for learners to be considered historically literate, they had to employ the skills and concepts of a historian to construct knowledge. Historical consciousness was briefly mentioned to infer the importance of historical consciousness in the process of historical literacy, but without any real understanding. Finally, the history textbook authors isolated the issue of historical literacy as being a crucial component of their view of historical literacy in that the role of the author and the government are inextricably bound to deliver proposed or government-sanctioned content. History textbook authors seemed to acknowledge that part of the purpose of school history is to be confronted with bias and indoctrination, but they seem unsure of how to deal with this facet being part of historical literacy.

The theories of historical literacy as encapsulated by the toolkit advocated a multi-dimensional approach to the fostering of historical literacy. Representational expression, ICT-understandings, applied science as well as contention and contestability are recent ideas to enhance multiple intelligences and extend history learners. Moreover, the rationale of these modern categories of historical literacy was to allow for a deeper understanding of history as the evidence used by historians evolves. None of the history textbook authors allocated any form of recognition to these factors of historical literacy, which confirms either their ignorance thereof or the fact that they are bound by their context which does not necessitate the need to investigate a holistic form of historical literacy.

Even though the authors got to respond in a free, unstructured manner, I felt that they were still bound by the system they functioned in. The history textbook authors had to abide by the assertions and requirements from the NCS - history. Therefore history textbook authors are inhibited by the political intentions of the NCS - history. Since no modern criteria were evident in my brief interrogation of the NCS - history, it followed that the history textbook authors would not feel compelled to explore “unnecessary” factors that were not deemed essential. Furthermore, the stated differences which emerged from the history textbook authors exacerbated this unawareness of modern criteria, as highlighted by the Toolkit for Historical Literacy, of historical literacy or ignorance thereof.

History textbook authors were afforded the opportunity to personally and honestly divulge their opinions on the purpose of school history and so too their knowledge of historical literacy. Their knowledge and sincerity in some cases revealed an acknowledgement of certain historical literacy criteria, but not necessarily an understanding thereof. In addition, a possible reason for



potential respondents from Grade 10 history textbooks who did not participate could be the fact that they did not feel empowered to acknowledge and discuss the purpose of school history. This reiterated a silence regarding that possibly few teachers or authors are aware of historical literacy. Knowingly or unknowingly history textbook authors were subscribing to the ideals of the NCS - history and the DoE who sanction their history textbooks. Thus the categories of historical literacy for representational expression, ICT-understandings, applied science as well as contention and contestability are not being developed; thus historical literacy, according to international theorists, was not being facilitated.

Ultimately, in response to my second research question concerning the type of historical literacy espoused by Grade 10 history textbooks, it is NCS – history compliant in that it features historical literacy common to both authors and the NCS - history. However, it does feature a broader spectrum of historical literacy than the NCS - history, yet the proof of whether history textbook authors are solely policy-compliant will be measured in the subsequent chapter. The historian's craft, historical concepts, moral judgements, narratives of the past and content endorsed the historical literacy from the NCS - history and the history textbook authors. The history textbook authors acknowledged the political landscape wherein they functioned. However, I am unsure of the broader spectrum of responses, in terms of affirming this suspicion, as only a minority commented on the subjective nature of history textbook writing and political interference from the government. The historical literacy from the history textbook authors is traditional in its approach as it does not feature any modern elements of historical literacy.

## **CHAPTER SIX**

### **THE MANIFESTATION OF HISTORICAL LITERACY IN GRADE 10 HISTORY TEXTBOOKS**

#### **6.1 Introduction**

This chapter is paramount to the study as it is the chapter that directly informed my final research question, namely identifying the type of historical literacy in Grade 10 history textbooks. This chapter aims at investigating the type of historical literacy manifested in selected Grade 10 history textbooks currently available for use by teachers and learners in South African classrooms. This chapter is an essential part of the progression of the study as it is the culmination of all of the research questions to effectively view the kind of historical literacy in Grade 10 history textbooks.

The version of historical literacy as explored by the NCS - history was initially and briefly explored in terms of finding the spirit of what the curriculum purported as historical literacy. This brief exploration informed the context wherein the history textbook authors functioned. The NCS - history was the starting point for history textbooks, whilst the history textbook authors were the interpreters of the curriculum and the generators of the Grade 10 history textbooks. Overall these two stages of analysis were imperative to provide the background of the environment for Grade 10 history textbooks.

Data for this chapter existed; therefore needed to be analysed. The three history textbooks that were used were Grade 10 history textbooks:

1. Dugmore, C., Lekgoathi, P., Pape, J., Weldon, G. & van Dyk, P. (2007). *Making History Grade 10 Learner's Book*. Sandton: Heinemann Publishers (PTY) Ltd.
2. Dyer, C., Nisbet, J., Friedman, M., Johannesson, B., Jacobs, M., Roberts, B. & Seleti, Y. (2008). *Looking into the Past*. Cape Town: Maskew Millar Longman.

3. Govender, S., Mnyaka, M. & Pillay, G. (2008). *New Generation History 10 – Learner’s Book*. Musgrave: New Generation Publishers.

As explored on page 90 of Chapter 4, the three Grade 10 history textbooks were selected based on the fact that they are the three history textbooks I am least familiar with. This ruled out the possibility of personal bias clouding my judgement. Furthermore, all three history textbooks are sanctioned by the DoE History Textbook Panel. The sections to be analysed for each of the textbooks, as described and explained in Chapter 4 (pp. 94 - 96), were the preface, the jacket cover (back cover) and three purposively selected activities from each history textbook (in total, nine history textbook activities were analysed). Since the data already existed, it merely required analysis in the form of open coding and discourse analysis (Fairclough’s analytic instrument for the preface and the jacket cover). The reason why I chose to analyse these three aspects of the selected history textbooks was to isolate and negate the possibility of one of the greatest weaknesses of this part of the study, namely that the emphasis could slip to a content study, which was not the aim of the study. Therefore by keeping the focus on historical literacy, I was able to minimise this potential weakness. Once the selected textbooks were analysed to determine their version of historical literacy, the data that was analysed was compared with the Toolkit for Historical Literacy to gain a deeper understanding of how their version compared with the accepted theorisation of the notion so as to answer my final research question, namely what kind of historic literacy is espoused by the Grade 10 history text books?

## **6.2 An interrogation of the nature of historical literacy as manifested in selected Grade 10 history textbooks**

Open coding was used to expose the common threads, patterns and themes from the preface, the jacket cover and selected activities. This was essential to find common trends between each history textbook so as to compile common criteria. In addition, Fairclough's (2003) analytic instrument reviewed each history textbook, with regard to the preface and the jacket cover, once the coding process was completed so as to better understand the context wherein the history textbooks functioned. Moreover, this instrument was used to identify the Grade 10 history textbooks' inherent discourse. In order to establish a deeper conceptual understanding of historical literacy as found in the selected textbooks, the Toolkit for Historical Literacy was used to compare and contrast the findings from open coding and discourse analysis concerning each history textbook (preface, jacket cover and selected activity). The stages for the analysis of the findings from the Toolkit for Historical Literacy was four-fold. Firstly, common factors of historical literacy between the various areas from the history textbooks and the Toolkit for Historical Literacy were identified. Thereafter categories of historical literacy which were only dealt with by the history textbooks and not the Toolkit for Historical Literacy were discussed. Thirdly, categories from the Toolkit for Historical Literacy which did not feature in the information from the prefaces were isolated and explored. Finally, the above-mentioned three processes were used to come to a conclusion of the historical literacy envisioned by Grade 10 history textbooks as established from the history textbooks.

### **6.2.1 Analysis of the Jacket Cover**

The jacket cover was chosen as it is in essence an advertisement of the type of historical literacy envisioned by the history textbook authors for the public to peruse. Fundamentally, the jacket cover is the first part of the textbook people look at in order to see what the history textbook comprises. The purpose of this section was not to solely compare the jacket covers, but to understand the inherent view of historical literacy among the jacket covers to eventually

understand the type of historical literacy found in Grade 10 history textbooks in its entirety. Each of the jacket covers was dealt with independently in terms of open coding as well as discourse analysis. Thereafter, a deeper conceptual understanding was implored through the use of the Toolkit for Historical Literacy so as to understand the nature of historical literacy within the jacket cover to eventually compare it with the other history textbooks. Once an understanding of the type of historical literacy from the jacket covers was established, it was used to create a greater understanding of the type of historical literacy in Grade 10 history textbooks.

Subsequently the content of the jacket covers of the three selected textbooks are discussed.

#### **6.2.1.1      *Making History Grade 10 Learner's Book***

The jacket cover's analysis provided an insightful probe into the historical literacy within the history textbook, *Making History Grade 10 Learner's Book*. After the application of open coding, a number of crucial themes became apparent with regard to historical literacy. In addition, the discourse of *Making History Grade 10 Learner's Book* was investigated to review the context within which this history textbook functioned. This was an essential process as it provided the platform to be used when seeking a deeper theoretical understanding of the Toolkit for Historical Literacy.

The jacket cover produced by *Making History Grade 10 Learner's Book* started advertising the book's intentions by reassuring learners that use of this history textbook would guarantee success during their schooling career. This success was heightened by the fact that the NCS - history was a most definite contributing factor in terms of its content and requirements. *Making History*

*Grade 10 Learner's Book* assured learners and teachers that all relevant NCS - history content was included. Activities were promised for every section

Historical literacy criteria	Sub-category	Jacket cover <i>Making History Grade 10 Learner's Book</i>
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to ensure learners understood the key questions posed to them from the NCS - history as well as employ and practise the necessary skills. This jacket cover promoted the idea that these activities were full of sources to make and negotiate historical meaning. Moreover, the history textbook authors guaranteed its potential readers that *Making History Grade 10 Learner's Book* was comprehensive in terms of its sources, as no additional sources were required to be found if their history textbook was chosen.

From discourse analysis the incumbent context that seemed to evolve from *Making History Grade 10 Learner's Book* was an explicit subservience and support of the NCS - history in terms of its key questions and its guidelines for contents and sources.

In terms of an insight into the historical literacy found in the jacket cover, open coding and discourse analysis revealed an emphasis on proposed skills and a source-based methodology that was revealed in the promised activities. This ensured that learners would be able to theoretically employ the craft of the historian. In addition, the discourse pertaining to the jacket cover was a political reminder of this history textbook's reliance and subservience to the NCS - history.

Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• No mention of content whatsoever</li> <li>• Just mentions all content purported by DoE facilitated within</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• Provides all necessary sources, no additional source material needed: paintings, maps, photographs, quotes from newspapers and diary entries</li> <li>• Activities</li> </ul>
Historical concepts	Cause and effect  Time  Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Historical consciousness	Linking the present/past/future  Making connections with the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Moral judgements in history	Empathy  Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>

**Table 6.1: The Toolkit for Historical Literacy and the jacket cover from *Making History Grade 10 Learner's Book***

**The Toolkit for Historical Literacy and the jacket cover of *Making History Grade 10 Learner's Book***



The Toolkit for Historical Literacy was used to engender a deeper understanding of the historical literacy as promoted by the jacket cover of *Making History Grade 10 Learner's Book*. Common areas of historical literacy on one hand partly dealt with events of the past and fully correlated with the historian's craft. Whilst, on the other hand, the jacket cover's political endorsement of the NCS - history featured beyond the boundaries of the Toolkit for Historical Literacy. Furthermore, a number of vital historical literacy criteria were noticeably absent from *Making History Grade 10 Learner's Book*, namely narratives of the past, historical consciousness, historical concepts, ICT-understandings, contention and contestability, representational expression and moral judgements in history.

After careful analysis of the trends from open coding, the discourse as well as use of the Toolkit for Historical Literacy, a conclusion was able to be drawn with regard to the incumbent historical literacy in this jacket cover. In terms of knowing and understanding events from the past, *Making History Grade 10 Learner's Book's* jacket cover only mentioned that all content was covered in the authors' history textbook as required by the NCS - history. The remainder of the jacket cover focused on skills, sources and assessment rather than knowing and understanding events of the past. The inferred meaning with regard to historical literacy is the fact that sources and skills are purported above content.

The jacket cover for *Making History Grade 10 Learner's Book* documented information pertaining to the historian's craft in terms of skills and sources. The learner's book was advertised as a textbook that advocated the benefits of sources and skills. *Making History Grade 10 Learner's Book* assured potential buyers of this history textbook that all required source material was incorporated within the authors' textbook. Sources included paintings, maps, photographs, quotes from newspapers and diary entries. These sources were promised to in turn facilitate and inform activities. Furthermore, an entire

chapter was advertised which was devoted to study skills and other learning techniques. The envisioned historical literacy could be described in a practical and functional manner wherein skills and sources grounded the craft of the historian.

An external factor of historical literacy from the jacket cover that did not feature in the jacket cover from *Making History Grade 10 Learner's Book* was the NCS - history-advocated influence on the history textbook. This history textbook ensured that it publicly stated and advertised that it was an NCS - history-endorsed history textbooks.

A number of categories for historical literacy were noticeably absent in the cases of the history textbook *Making History Grade 10 Learner's Book*, namely narratives of the past, ICT-understandings, historical consciousness, moral judgements, historical concepts contention and contestability, representational expression and applied science in history.

The jacket cover from *Making History Grade 10 Learner's Book* is a public advertisement as to the proposed and promised aims of the history textbook in terms of its historical literacy. In addition, this history textbook promised its version of historical literacy which was based on a source-based methodology. Its proposal was functional, political and lacked in the modern criteria for historical literacy.

#### **6.2.1.2      *Looking into the Past - Grade 10***

The jacket cover of *Looking into the Past - Grade 10* promised its audience a source-based history textbook that was underpinned by empathy and skills. The open coding used to analyse *Looking into the Past - Grade 10*, revealed a number of crucial themes which came to the fore pertaining to historical literacy. In addition, the discourse of *Looking into the Past - Grade 10* was investigated to better understand the nature of the context within which this history textbook functioned. This was an essential process, since it provided the platform to be used in the analytical instrument, the Toolkit for Historical Literacy.

The jacket cover's text began by focusing on reassuring potential readers that *Looking into the Past - Grade 10* subscribed to the ideals as necessitated by the NCS - history. Furthermore, a clear instruction was issued to comfort teachers and learners that *Looking into the Past - Grade 10* provided comprehensive coverage of the latest NCS - history subject assessment guidelines. In terms of the contents of the history textbook, *Looking into the Past - Grade 10*, stated that it followed a source-based methodology which used a source-based approach to its course work. The contained sources promised to be substantial in terms of profiles, maps and cartoons. In addition, these activities and their required skills would be facilitated in the activities. *Looking into the Past - Grade 10* guaranteed that learners would develop critical thinking as well as have a sense of empathy instilled within them to better understand people and change. Therefore the proposed historical literacy, as advertised on the jacket cover, isolated the adherence to a source-based methodology which was underpinned by the historical concept of empathy to judge the past and to a lesser degree a fleeting interaction with the historical concept of change.

The inherent discourse surrounding *Looking into the Past - Grade 10* was a context which was largely reflective of the NCS - history. This was reiterated

by the constant links in the jacket cover to the assessment requirements as endorsed by the NCS - history.

In terms of historical literacy as found in *Looking into the Past - Grade 10*, this history textbook subscribed to the ideals of the NCS - history in terms of espousing a source-based methodology with a hint of the historical concepts of empathy and change.

**Table 6.2    The Toolkit for Historical Literacy and the jacket cover from *Looking into the Past - Grade 10*.**

**The Toolkit for Historical Literacy and the jacket cover from *Looking into the Past - Grade 10*.**

<b>Historical literacy criteria</b>	<b>Sub-category</b>	<b>Jacket cover – <i>Looking into the Past - Grade 10</i></b>
Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• Advocated it is a source-based history textbook – provides learners with a complete resource for studying history</li> <li>• Follows source-based methodology which encourages critical thinking</li> <li>• Packed with profiles, photos, maps and cartoons</li> <li>• Builds skills such as writing, source analysis and detecting bias.</li> </ul>
Historical concepts	Cause and effect Time Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• Understanding of how perspectives of history change</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Historical consciousness	Linking the present/past/future Making connections with the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Moral judgements in history	Empathy Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• Instils empathy by creating understanding how perspectives change in history</li> <li>• Very narrow one-dimensional view</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>

When comparing the common features of historical literacy, the role the historian plays in terms of source-based work was identified by both the jacket cover and the Toolkit for Historical Literacy. In addition, the historical concept of change and empathy was fleetingly exposed by the jacket cover to better understand the past. The third and final similar historical literacy criterion was the issue of moral judgements in history. With regard to what the jacket cover stated, that did not feature in the Toolkit for Historical Literacy, the influence of the NCS - history in the history textbook, was isolated. Furthermore, a number of conceptual factors for historical literacy did not mark the jacket cover. These historical literacy criteria included events and narratives of the past, ICT-understandings, historical consciousness, contention and contestability, representational expression and finally applied science in history.

*Looking into the past* did not use the terms “knowing”, “understanding” or “content” on its jacket cover. Instead of advocating the learning of history, the jacket cover promoted assessment that was endorsed by the NCS - history. With regard to the Toolkit for Historical Literacy, knowing and understanding events of the past did not feature. Thus the measure of historical literacy did not facilitate content, which portrayed the mindset that historical literacy was not important.

Similarly, the history book *Looking into the Past - Grade 10* was portrayed to the public as being a source-based history textbook which provided learners with a complete resource for studying history. Moreover, this history textbook, followed a source-based methodology, and use of the authors’ history textbook was necessary to complete the source-based course. As identified above, no mention of learning and understanding history in terms of content was perpetuated. The goal of *Looking into the Past - Grade 10* history textbook was to build skills of writing, source analysis and detecting bias from

profiles, photographs, maps and cartoons. The category of the historian's craft, as explored by the Toolkit for Historical Literacy, used the idea of heuristics to source information, corroborate and thereafter contextualise the information. The jacket cover directly discussed the reliance on sources and the appropriate skills to successfully use this history textbook. Thus the role of a historian was potentially explored within the history textbook as promised by the jacket cover which correlated with the Toolkit for Historical Literacy.

The category of moral judgements in history as well as to a lesser degree, historical concepts, were briefly dealt with by *Looking into the Past - Grade 10*. This history textbook encouraged the instilling of empathy by understanding how perspectives of history changed over time. Moreover, the facilitation of empathy would facilitate the understanding of the historical concept of change and subsequent human action. This seemed to be a one-dimensional view of moral judgments and historical concepts as it was used briefly in the same sentence. The true understanding of this concept would be measured when analysing the activities.

A category which did not fit into the Toolkit for Historical Literacy was the continuous assurance to the public, and possibly the endorsing power of the DoE that each history textbook fully subscribed to the ideals of the NCS - history in terms of assessment and lesson planning. This assurance is political in nature and did not facilitate any categories of historical literacy from the Toolkit for Historical Literacy.

A number of categories for historical literacy were noticeably absent in the cases of the history textbooks *Looking into the Past - Grade 10* and *Making History Grade 10 Learner's Book*, namely narratives of the past, ICT-understandings, historical consciousness, contention and contestability, representational expression and applied science in history.

The discourse pertaining to the jacket cover from *Looking into the Past - Grade 10* illustrated the fact that the cover wholly reiterated the aims and purposes of the NCS - history and its ideological aims of redress and source-based work.

The advocated historical literacy purported on the back of the history textbook cover was dominated by skills in the form of the effective use of a variety of sources. Content in terms of knowing and understanding past events was largely ignored, save for one history textbook acknowledging that they fully subscribed to the content as endorsed by the NCS - history. Furthermore, the historical concept of change and the concept of empathy were briefly mentioned. However, on the whole, the version of historical literacy presented by the history textbooks was dominated by the historian's craft. This was evident in the history textbook titled *Looking into the Past - Grade 10* in which the authors presented their textbook as a source-based methodology. Therefore the historical literacy was potentially one-dimensional.

### **6.2.1.3      *New Generation History - Grade 10 Learner's Book***

The history textbook, *New Generation History 10 – Learner's Book*, did not have a historical explanation on the jacket cover, merely contact and distribution details. With regard to historical literacy, this history textbook, as a commercial product, obviously did not feel the need to promote its historical literacy outside its textbook. Moreover, perhaps the inherent subtext is displaying that this history textbook attributed little value to advertising its historical literacy or the fact that it did not have an individual sense of historical literacy. Rather, it potentially remained policy compliant which would have to be measured in the preface and activities.



#### **6.2.1.4 Comparison of both jacket covers to reveal the envisioned historical literacy**

As the jacket cover is an advertisement for the type of historical literacy endorsed by the history textbooks, it was in essence the first opportunity for viewing the envisioned historical literacy. The promises advocated by the history textbooks, in each of their respective jacket covers, would be reviewed in terms of its application in the prefaces and the activities to review whether this type of historical literacy was delivered. Furthermore, these promises could also be analysed in terms of their depth of understanding of the historical literacy criteria.

The advocated historical literacy purported on the back of the history textbook covers was dominated by skills in the form of the effective use of a variety of sources. Content in terms of knowing and understanding past events was largely ignored, save for one history textbook acknowledging that the authors fully subscribed to the content as endorsed by the NCS - history. However, the impetus of knowledge was placed on understanding and not on learning or knowing facts. Furthermore, the historical concept of change and the concept of empathy were briefly mentioned. However, on the whole, the version of historical literacy presented by the history textbooks was dominated by the historian's craft. This was evident in the history textbooks by presenting them as an endorsement of their source-based methodology. The historical literacy, as found in the jacket cover was one-dimensional in a sense that it was proposed as a functionality of the discipline. Moreover, it is one-dimensional in that no modern criteria were facilitated.

#### **6.2.2 Analysis of the Preface**

The preface of each chapter was chosen as it was the second insight from the history textbook authors that readers or learners received. The preface is a personal look into the inherent ideas in the history textbook as well as what the history textbooks authors foreground as being important in their history textbooks. Moreover, it was an opportunity for the history textbook authors to potentially ground and instil their form of historical literacy and elaborate on the promises introduced by the jacket cover. The purpose of this section was not to do a comparative study, but to partially compare and/or contrast history textbooks so as to arrive at a common understanding of Grade 10 history textbooks to then gain a deeper conceptual view of historical literacy as embodied in the selected textbooks' prefaces.

#### **6.2.2.1      *Making History Grade 10 Learner's Book***

The history textbook *Making History Grade 10 Learner's Book* written by Dugmore (2007) did not have a preface to examine; it started immediately with the bibliographic details and then the contents. The inference in terms of historical literacy was that the jacket cover provided an insight into the type of historical literacy and they would then endorse it in their chapters and activities. The fact that it was NCS - history policy-compliant implied that it did not need a personal insight from the history textbook authors or publishers as it already complied with the NCS - history's version of historical literacy.

#### **6.2.2.2      *Looking into the Past - Grade 10***

The preface offered by Dyer *et al* (2008) in *Looking into the Past - Grade 10* revealed an insight, from the history textbook's point of view, concerning what the textbook valued in terms of historical literacy as well to what degree the historical literacy mimicked the NCS - history.

This preface began by grounding itself in the requirements of the NCS - history (2003) and stated that all facets of the remainder of the textbook were in accordance with the requirements of the DoE. The preface used exact excerpts from the NCS - history to fully illustrate the subscription it afforded the curriculum document. At the beginning of the preface, it declared “A new approach to history” wherein the history textbook advocated that the benefits of studying this history textbook would empower learners to make informed decisions in order to function effectively in society and to advance society (Dyer *et al.*, 2008, p. vi). Thereafter, the NCS - history’s version of the benefits of studying history were implemented. *Looking into the Past - Grade 10* examined and reiterated the NCS - history’s statements concerning the process of historical enquiry, how history supported democracy and how history was a vehicle for human rights. This preface, through the NCS - history, argued that history afforded learners opportunities to interrogate evidence from differing points of view, whilst providing a critical understanding of socio-economic systems. In addition, learners would be exposed to versions of history that were often contradictory and conflicting. In terms of supporting the curriculum, the authors of *Looking into the Past - Grade 10* believed their history textbook fostered the democratic values from the Constitution, encouraged civic responsibility, championed peace, human rights and democracy whilst preparing learners for “local and global citizenship” (Dyer, *et al.*, 2008, p. vi). The inferred historical literacy implied a definite hint of policy compliance with the side of the NCS - history.

A guideline was offered wherein the preface explained how learners should use the history textbook. Within this instruction, the application of open coding revealed a significant pattern which detailed the methodological paradigm that *Looking into the Past - Grade 10* envisaged. *Looking into the Past - Grade 10*’s preface advocated a source-based approach to history which was underpinned by activities wherein an opportunity was afforded to present the

<b>Historical literacy criteria</b>	<b>Sub-category</b>	<b>Preface – <i>Looking into the Past - Grade 10</i></b>
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acquired skills, knowledge and values in the form of activities. Moreover, the use of the word “skills” was repeated throughout the guideline to illustrate its importance within the history textbook. The culmination of the instruction on how to use the learner’s book ended with a greeting from the authors. However, the proposed historical literacy was source-based and dominated by historical skills.

In continuation, despite the technical ending of the preface after the authors had greeted the learners illustrating the end of the insight from the publishers and history textbook authors, I felt it was vital to describe the remainder of the pages until the history textbook actually began. The heading, titled “How this book covers the curriculum requirements”, afforded the history textbook the opportunity to insert all of the LOs and the ASs dictated by the NCS - history (Dyer *et al.*, 2008, p. vii). This ensured a public statement that this history textbook openly subscribed to the influence of the NCS - history; a necessary requirement for the DoE panel selecting the book. .

The first page of the preface from *Looking into the Past - Grade 10* was NCS - history-dependent and offered no real insight into what the history textbook authors championed as the benefit of buying or using their history textbook. However, the preface was to reiterate the NCS - history-required skills. This was evident in the remaining three pages which reinforced and depicted each LO and AS as determined by the NCS - history. Therefore, historical literacy was mostly determined by what the NCS - history prescribed and dictated. No new insights of historical literacy were afforded.

Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• Contradictory versions of the same history (vi)</li> <li>• Activities demonstrate skills and constructed knowledge</li> <li>• Just understanding not knowing.</li> <li>• LO 3 - understands, plans and constructs argument - content negated in favour of skills-based approach</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• Supports the view that historical truth consists of multiple expressions of varying and often contradictory versions of the same history (vi)</li> <li>• Different interpretation of historical events, peoples' actions and change</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• Encourages careful debate through careful evaluation of a broad range of evidence and diverse points of view</li> <li>• "This course emphasises a source-based approach to history" vi</li> <li>• LO 1 - formulates questions, select sources, extract &amp; organise information logically and engage with sources for information. vii</li> </ul>
Historical concepts	Cause and effect  Time  Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• LO 2 as explored on page viii - mere repetition of the NCS - history.</li> <li>• No use of time etc only empire, liberty, democracy, socio-economic and power relations</li> <li>• Different interpretation of history events, peoples' actions and change</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Historical consciousness	Linking the present/past/future  Making connections with the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Moral judgements in history	Empathy  Developing a moral and ethical	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>

	framework of the past.	
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>

After the application of discourse analysis, it became increasingly clear that the environment and dominating context wherein this history textbook functioned was largely policy compliant. *Looking into the Past - Grade 10* promised to engender democratic values whilst delivering content, skills and historical concepts as required by the NCS - history.

### **6.3 The Toolkit for Historical Literacy and the preface from *Looking into the Past - Grade 10*.**

#### **The Toolkit for Historical Literacy and the preface from *Looking into the Past - Grade 10*.**

*Looking into the Past - Grade 10* preface's open coding application revealed a number of common themes pertaining to historical literacy with the Toolkit for Historical Literacy. Events of the past, multiple narratives, the historian's craft, moral judgements in history and historical concepts were similar patterns of historical literacy compared with the Toolkit for Historical Literacy. In addition, the reliance on the NCS - history and its political motivations were not facilitated by the Toolkit for Historical Literacy. Furthermore, aspects from the preface were noticeably absent from the Toolkit for Historical Literacy, namely ICT-understandings, contention and contestability, representational expression as well as applied science in history. In terms of the proposed historical literacy, this preface seemed to advocate the history textbook's intention of moulding the learners into an NCS - history-prototype.

In terms of identifying the first category of the Toolkit for Historical Literacy, events of the past, *Looking into the Past - Grade 10* proposed that understanding the past was more crucial than knowing and learning facts. The preface denoted that all activities would incorporate skills to construct knowledge. This was reinforced by the fact that the history textbook authors emphasised their textbook as promoting a source and skills-based methodology. In addition, *Looking into the Past - Grade 10* detailed LO 3 – Knowledge Construction and Communication – in terms of how learners had to use the activities and sources to understand a past event to plan and construct an argument, as required by the NCS - history. Furthermore, this history textbook acknowledged that learners would be exposed to contradictory viewpoints, within sources, of the same account with which to interrogate to construct an argument. Therefore the type of historical literacy found in this preface is functional in that it proposed sources and skills; not knowledge.

This history textbook alerted learners to the fact that they would be exposed to conflicting accounts for the same historical period. Furthermore, LO 3 – Knowledge Construction and Communication – was presented, verbatim from the NCS - history, to describe how learners would use the history textbook in conjunction with the NCS - history requirements. This entailed that multiple sources would be interrogated to facilitate an understanding of the past. The Toolkit for Historical Literacy revealed that knowledge was constructed from sources and understood, rather than implied, learners should know events of the past. In addition, history was constructed as a result of a multiplicity of voices. In its preface the authors of *Looking into the Past - Grade 10* discussed the fact that there were different interpretations of historical events which constituted the multiple expressions and varying depictions of the past. Moreover, the opportunity for conflicting voices would be presented in the use of multiple sources in the activities. Understanding the past and interrogating it through many sources was a crucial promise of historical literacy from this preface.

The craft of the historian, as espoused in the Toolkit for Historical Literacy, uses the theory of heuristics to source information, corroborate said information and then contextualise it. The role of the historian was pivotal to the prefaces of both the history textbooks. There was a large emphasis placed on the use of sources in the history textbook, *Looking into the Past*, “This course emphasises a source-based approach to history” (Dyer *et al.*, 2008, p. vi). In addition, learners had to act like historians in the sense that they had to formulate questions, select sources, extract and then organise information logically and engage with sources for information while always being mindful of diverse points of view (Dyer *et al.*, 2008). Therefore historical literacy was constituted through the historian’s craft.

On the other hand, *Looking into the Past - Grade 10* explored the NCS - history’s version of first order historical concepts for Grade 10, namely empire, liberty, democracy, socio-economic and power relations. The term “time” was not mentioned whilst the term “change” was used in the context of interpreting people’s actions. The second order historical concepts of change, causation and effect were not foregrounded in the preface, thus their possible application would have to be reviewed in the activities.

Thereafter, history was fully discussed in the context of its role in South Africa to bring about healing, explore issues of the past, racism, xenophobia, gender, class and genocide (Dyer *et al.*, 2005; Govender *et al.*, 2008). The idea of democracy was foregrounded to reveal that the discipline of history supported democracy as a vehicle for human rights. Furthermore, the LO of heritage was promoted to satisfy the understanding of South Africa’s past and indigenous knowledge as well as to satisfy the political role of history: “[History] enables us to focus on the role of memory in society by emphasising oral history and an understanding of indigenous knowledge systems” (Dyer *et*



al., 2005, p. vi). Therefore, in addition to the categories of historical literacy as exposed by the Toolkit for Historical Literacy, the historical literacy found within the prefaces of Grade 10 history textbooks revealed a reliance on ideology to influence the manner in which history is dealt with in the textbooks.

There were a number of categories from the Toolkit for Historical Literacy that were noticeably absent as no mention was made of any of them. ICT-understandings did not feature in any of the history textbooks' prefaces. In addition, the area of public/professional debate under the heading of contention and contestability was not discussed. Furthermore, representational expression, moral judgements in history and applied science were absent too. This could be based on the fact that the NCS - history did not subscribe to these factors of historical literacy or the history textbook authors did not know of them or were ignorant to them.

Historical literacy could be described as having the historian's craft at the fore. This outcome was determined by the fact that every subsequent facet of historical literacy was elicited or informed by the role of the historian. The preface also attributed the factor of making connections with the past to being central for a learner's historical growth. In addition, the idea of multiple narratives was discussed as a given that the rest of the history textbooks would adhere to fostering. The envisioned historical literacy in the preface purported the use of historical concepts to make historical meaning. Finally, knowing and understanding past events was mentioned. However, it was mentioned in terms of the NCS - history requirements.

### **6.2.2.3      *New Generation History - Grade 10 Learner's Book***

This history textbook began with a dedication to the learners of a democratic South Africa. The ideals of democracy, tolerance, national unity and respect were wished upon the learners. Thereafter, the history textbook authors and/or publishers provided a note to the modern-day learners on how to proceed with their history textbook and the expectations thereof. The preface from *New Generation History - Grade 10 Learner's Book* promised a history textbook that provided a “new approach” to school history and the use of many sources which were user-friendly and would be used in conjunction with historical skills to ultimately construct knowledge (Govender *et al.*, 2008, p. ii). *A New Generation History - Grade 10 Learner's Book* promised learners that, “(i)f used well, this text will help you to understand the enquiry approach to History adopted in the NCS and you are bound to appreciate history for the interesting, critical and challenging discipline that it is” (Govender *et al.*, 2008, p. ii). The history textbook authors concluded their section directed at the learners by stating that their history textbook would allow learners to effectively function in the 21st century. The inferred historical literacy was a means to position the history textbook politically so learners understand the NCS - history requirements from the outset.

Half a page of the NCS - history was dedicated to aligning the history textbook with the NCS - history. As with the previous history textbook, *Looking into the Past - Grade 10*, chunks of discourse were taken from the NCS - history to inform readers of the NCS - history's idea of history, its purpose and its benefits as well as how it supported democracy. The view taken from the NCS - history promised learners that history was a study of “change and development over time and space”, which focused on palaeontology, archaeology and genetics (Govender *et al.*, 2008, p. ii). In addition, the purpose of the discipline assured learners that history fostered democracy and allowed for effective decision-making. Furthermore, history afforded learners the opportunity, as exposed by open coding, to personally empower themselves to better understand human actions. As with the previous history textbook, the authors used the NCS - history requirements for historical

<b>Historical literacy criteria</b>	<b>Sub-category</b>	<b>Preface – <i>New Generation History - Grade 10 Learner's Book</i></b>
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enquiry. Learners would gain historical insight from using multiple sources and interrogating multiple narratives. Moreover, the study of history, according to the preface and as stated in the NCS - history, fostered democracy, human rights and peace.

The remainder of the preface was dedicated to grounding history in a South African context. This section was engorged with values from the NCS - history, the Constitution and values that support a democratic country. An example of this would be how the preface aligned the history textbook with the Constitution (Govender *et al.*, 2008, p. iii),

History, in all of its aspects, should contribute to the realisation of the vision for South Africa which is clearly stated in the Constitution, as follows:

‘A prosperous, truly united, democratic and internationally competitive country with literate, creative and critical citizens leading productive, self-fulfilled lives in a country free of violence, discrimination and prejudice.’

In addition, the preface stated that *New Generation History - Grade 10 Learner's Book* subscribed to the NCS - history’s conceptual framework wherein skills, concepts and constructed knowledge were presented in accordance with the LOs. The LOs and ASs concluded the preface by detailing what the NCS - history detailed for Grade 10 history learners. Historical literacy, as per the NCS - history, seemed to be rooted in historical skills and historical concepts to construct knowledge.

Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• Use sources to construct knowledge</li> <li>• Multiplicity of voices expressing varying contradictory versions of same history ii</li> <li>• LO 3</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• History supports view that historical truth consists of multiplicity of voices expressing varying contradictory versions of same history</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• Note to learners ii - history textbook offers new approaches, fresh perspectives and covers important historical skills</li> <li>• Wide variety of sources - stories, cartoons, maps, illustrations, statistical tables, quotes</li> <li>• Working with sources, extract, analyse, interpret, organise and synthesise info to construct knowledge</li> <li>• iii - Learners who study history should use the insights and skills of a historian – analyse sources and events, study different opinions and divergent interpretations and voices to build historical imagination</li> </ul>
Historical concepts	Cause and effect  Time  Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• Evaluate change</li> <li>• LO 2 same as above</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Historical consciousness	Linking the present/past/future  Making connections with the past	<ul style="list-style-type: none"> <li>• Evaluate how past human action impacts on the present and influences the future</li> <li>• History as a vehicle of personal empowerment</li> <li>• Historical imagination</li> </ul>
Contention/cont estability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Representation al expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No related comments</li> </ul>
Moral judgements in history	Empathy  Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• History as a vehicle of personal empowerment engenders an understanding of human agency and humans have choices to change world for better place ii</li> </ul>

Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• Study of archaeology, palaeontology and oral history – no genetics – not developed</li> </ul>

The discourse surrounding the NCS - history, as revealed by Fairclough's analytic instrument in the *New Generation History - Grade 10 Learner's Book* revealed a political subservience to the NCS - history. This history textbook constantly reiterated that it subscribed to the ideals of the NCS - history and the preface was structured in a way that it told learners that they would be capable young historians who fostered and engendered democracy whilst upholding the Constitution. The discourse which permeated this history textbook was political in nature from the point of view of the NCS - history. There seemed to be no other room for additional political, economic or educational beliefs.

The incumbent version of historical literacy was a source-based methodology which was underpinned by the NCS - history's version of historical literacy. This preface was especially politically motivated in its intentions for historical literacy.

**Table 6.4    The Toolkit for Historical Literacy and the preface from *New Generation History - Grade 10 Learner's Book* .**

**The Toolkit for Historical Literacy and the preface from *New Generation History - Grade 10 Learner's Book* .**

In terms of the core areas of historical literacy as revealed by the Toolkit for Historical Literacy, the *New Generation History - Grade 10 Learner's Book's*

preface revealed common areas in terms of the historian's craft, multiple narratives, events of the past, historical consciousness, historical concepts, applied science in history and moral judgements in history. The Toolkit for Historical Literacy did not facilitate the political discourse inherent in the history textbook, whilst the preface did not accommodate the areas of ICT-understandings, representational expression and contention and contestability.

The *New Generation History 10 – Learner's Book's* preface argued that knowledge construction was possible through the use of sources and the endorsement of sources. Moreover, the case for historical literacy was that the source of knowledge was through interrogation of evidence. Learners had to deconstruct the texts to better understand the inherent information to construct an argument. Therefore the argument for historical literacy partly correlated with the Toolkit for Historical Literacy. Understanding the past was favoured to actually knowing it. Furthermore, the use of subjective facts to construct knowledge was ignored.

In terms of learners understanding that the past is constructed from multiple narratives, this preface promoted that history was constructed as a result of a multiplicity of voices. It was this multiplicity of voices that was needed to understand the process of construction of the past. Therefore the Toolkit for Historical Literacy's discussion of multiple narratives was evident in the preface.

The authors of the *New Generation History - Grade 10 Learner's Book* began their preface by grounding their belief that their history textbook would encourage the historian's craft by working with a wide variety of sources – stories, cartoons, maps, illustrations, statistical tables and quotes. Furthermore, they adopted the purpose of school history as engendered by

the NCS - history, "Learners who study history should use the insights and skills of a historian," (Govender *et al.*, 2008, p. ii). This entailed that learners worked with sources to extract, analyse, interpret, organise and synthesise information so as to construct an argument and to foster historical imagination. This preface offered the view that the historian's craft was foregrounded in terms of historical literacy. Additionally, this textbook used LO 1 (Enquiry skills) to explore the use of historical skills and sources to satisfy the goal of acting in the likeness of a historian, as required by the Toolkit for Historical Literacy.

The *New Generation History - Grade 10 Learner's Book's* preface merely reiterated the use of LO 2 for the authors' depiction of historical literacy and no mention of time or the evaluation thereof was developed. Historical concepts, in terms of the Toolkit for Historical Literacy were not fully developed uniquely in the history textbooks, as it fell under the NCS - history's LOs. Moreover, second order concepts of change, cause and effect, from the Toolkit for Historical Literacy were noticeably absent in the prefaces.

The notion of personal empowerment is also dealt with by *New Generation History - Grade 10 Learner's Book* when the history textbook authors proposed that history was a vehicle for personal empowerment. Furthermore, the author of the *New Generation History - Grade 10 Learner's Book* argued that after studying the discipline of history, a sense of historical imagination could be fostered. In the context of this phrase, historical imagination seemed to be synonymous with historical consciousness in that learners could make responsible decisions based on their conceptual framework and their acquired historical skills. In terms of the international conceptual understanding of historical consciousness, a correlation of making connections with the past may be evident, but I do not feel the true essence of the concept is facilitated through the prefaces.

The *New Generation History - Grade 10 Learner's Book's* preface isolated an important benefit of historical literacy in that it engendered an understanding of human agency and that humans had choices to change the world for the better. This aspect of historical literacy was synonymous with the Toolkit for Historical Literacy's category of moral judgements in history, with regard to empathy. The fact that the use of moral judgements correlated with the Toolkit for Historical Literacy would be fully informed by the activities as I am not sure that the full comprehension of this term was fully conceptually grounded.

The final category that was evident from the Toolkit for Historical Literacy, as found in the *New Generation History - Grade 10 Learner's Book* was the issue of applied science in history. However, the issue of science was not specifically referred to, rather it was implied. *New Generation History - Grade 10 Learner's Book* spoke of the discipline of history exploring archaeology, palaeontology and genetics. However, the proof and evidence of this promise of historical literacy could only be tested in the activities.

The second part of the analysis from the Toolkit for Historical Literacy detailed that some factors for historical literacy, from the preface, were not facilitated by the Toolkit for Historical Literacy, which warranted discussion. The factor which did not feature in the Toolkit for Historical Literacy was the political paradigms purported by both history textbooks. Constant mention was made in both history textbooks that they subscribed wholly to the requirements of the NCS - history. Tables were included which reiterated the subscription of the history textbook to the DoE's LOs as well as the ASs. In addition, both history textbooks explored the scope and purpose of history as found in the NCS - history, but focused mainly on the political aspirations of the DoE. The authors of the *New Generation History - Grade 10 Learner's Book* (2008, p. i) dedicated their history textbook to "... an emerging nation and the children of



South Africa. May the spirit of democracy, tolerance, mutual respect and national unity prevail in the teaching, learning and assessment of history.” The proposed form of historical literacy hinged on the policy-compliance to the NCS - history.

The *New Generation History - Grade 10 Learner's Book's* version of historical literacy could be described as having the historian's craft at the fore. This outcome was determined by the fact that every subsequent facet of historical literacy was elicited or informed by the role of the historian. The preface also attributed the factor of making connections with the past to being central for a learner's historical growth. In addition, the idea of multiple narratives was discussed as a given consideration that the rest of the history textbooks would adhere to fostering. The envisioned historical literacy in the preface purported the use of historical concepts to make historical meaning. In addition, the use of applied science for historical literacy was elicited. However, this needed to be inferred from the activities to verify. Finally, knowing and understanding past events were mentioned. However, it was mentioned in terms of the NCS - history requirements.

#### **6.2.2.4 Comparison of the two prefaces to reveal the envisioned historical literacy**

Historical literacy could be described as having the historian's craft at the fore. This outcome was determined by the fact that every subsequent facet of historical literacy was elicited or informed by the role of the historian. The preface also attributed the factor of making connections with the past to being central for a learner's historical growth. In addition, the idea of multiple narratives was discussed as a given that the rest of the history textbooks would adhere to fostering. The envisioned historical literacy in the preface purported the use of historical concepts to make historical meaning. Finally,

knowing and understanding past events was mentioned. However, it was mentioned in terms of the NCS - history requirements.

In the light of the two history textbooks which had a detailed preface, knowing historical content was superseded in favour of understanding said content, as was the category for the Toolkit for Historical Literacy. Instead of learning and knowing historical knowledge, learners had to construct their argument from available evidence in an attempt to understand the event. Evidence was proffered in the form of multiple sources. Interrogation of sources together with skills and historical concepts was reminiscent of the SHP. The paradigm of historical literacy seemed to be saturated by sources and historical skills.

Conflicting narratives and the use of many sources to expose this conflict was promised in the prefaces. In addition, I was unsure of a number of terms and historical concepts used fleetingly as to their degree of depth in understanding. The use of the concepts of empathy, change, cause and effect were mentioned and alluded to, but it was in the context of NCS - history ideals, so I needed to interrogate the activities to review the depth of understanding.

Overtly, the historical literacy from the prefaces was undeniably policy-compliant with the NCS - history. In both of the prefaces, the majority of the preface was dominated by exact excerpts from the NCS - history with little unique or new perspectives from the history textbooks. *Making History Grade 10 Learner's Book* did not even have a preface, which illustrated that no additional or independent insights were offered for learners from the history textbook. This silence possibly reiterated the adoption of the NCS - history's version of historical literacy, unquestioningly.

Historical literacy, as envisioned by the history textbooks' prefaces, revealed a functional assertion that provided learners with skills to decode multiple sources with which to construct knowledge as grounded by the historian's craft. In addition, the categories of moral judgements, historical concepts and applied science were mentioned one-dimensionally. These factors of historical literacy needed to be tested in the activities to measure the degree of conceptual understanding. The historical literacy was constantly enshrouded by the NCS - history. Modern factors of historical literacy were lacking. Overall, the historical literacy, in the prefaces, was NCS - history-inspired in its functionality and hints of the remnants of the SHP.

### **6.2.3 Analysis of the selected activities to reveal the envisioned type of historical literacy**

The main reason why I chose to use activities for my analysis was the fact that activities were the culmination of what kind of historical literacy was actually measurable in the history textbooks. Furthermore, the analysis of the activities provided an opportunity to assess to what extent the preface and the jacket cover adhered to their advocated promises. In terms of historical literacy, and the context of the topic, this part of the analysis engendered an insight into the type of historical literacy being tested in the activities. The activities, which were purposively selected, were an opportunity to see what historical literacy tools were required of the learners to be able to answer the relevant questions.

The choice of activities was by purposive selection in order to ensure that I did not leave out any significant activity. Three activities per history textbook were chosen to yield rich data. These activities can be found in Appendices B-D. Each of the activities was dealt with independently in terms of open coding.

Thereafter, a deeper conceptual understanding was implored through the use of the Toolkit for Historical Literacy.

Overall, the purpose of this section was not to solely compare and/or contrast the activities, but to understand the inherent view of historical literacy between the activities to eventually understand the type of historical literacy found in Grade 10 history textbooks in their entirety. Furthermore, the activities were a means of “testing” the previous findings as they were the application of historical literacy from the prefaces and the jacket covers.

### **6.2.3.1      *Making History Grade 10 Learner's Book***

This history textbook was the first to be analysed in terms of its activities to identify the type of contained historical literacy. Purposively selected activities dealt with a range of content and were chosen at different times. Open coding was used to reveal the common patterns and themes.

A1 was an activity based on two sources concerning the trade of chieftains, namely Dingiswayo, which was found on page 210. In terms of this activity, some of the sources had to be explicitly referred to in the four questions, whilst one required background content knowledge.

The first question required that learners had to explain why trade was important to chiefs. Moreover, it stated that learners had to read the sources to isolate the answer. This question was purely source-based and necessitated careful source analysis. Similarly, the second question asked which sources illustrated the type of goods being traded. Learners had to merely interrogate the sources so as to underline the correct answer. In the

same vein, the final question advocated that learners had to review the source to account, in their answer, why warfare occurred because of trade goods. This answer was based on the source; learners had to infer the source to describe it. The only question which entailed that learners had to use background knowledge was the third one. This question asked learners to discuss how external trade may have led to conflict. In terms of this activity, background content knowledge was required for one of the four questions, whilst the remaining three could be answered from the sources. The emphasis of the historical literacy of this activity was source-based.

In addition to the role of sources and skills for this activity, an implied version of historical concepts was presented in the form of learners having to use the source as a stimulus to answer the question in terms of its cause and effect.

The second activity, A2, comprised four questions which dealt with varying perspectives of the *Mfecane*, found on pages 207-208. This activity was largely source-based and required that learners identify sources to account for the pertinent answer. Three of the four questions advocated that learners should identify the sources that suggested that the Griqua raided other communities, how the Griquas won battles as well as which sources dissented the role of the Griqua in warfare.

The remaining question alerted learners to a picture of a Griqua person and asked them to decide whether the person in the painting would still look the same. I do not feel that this question warranted much historical merit in that learners could answer it, based on age, rather than imploring historical tools.

This activity did not permit any knowing or understanding of past knowledge. All of the answers were solely dependent on the sources and all of the

information was contained therein. No background knowledge or historical insight was required, just effective skills to interrogate the sources. In addition, historical concepts were indirectly used to facilitate an understanding of what happened and its eventual effect. Therefore the applied historical literacy was source and skills-dependent with a hint of historical concepts.

The final activity, A3 (pages 175-178), dealt with the factory system of the Industrial Revolution, in terms of workers' rights and exploitation of workers. This activity also consisted of four questions.

The first question required that learners should account for reasons why factory workers were easily exploited. In addition, this question called for learners to use their own knowledge to provide possible reasons for the exploitation. Similarly, the last question of the activity detailed pair work to analyse source D. This question necessitated learners to use the source as a stimulus to process their decisions and to construct knowledge as to whether the division of time was adequately allocated. The other two questions, on the other hand, required learners to identify and account for information in the sources. These two questions were purely source-based and required skills to infer the answer.

In terms of the overall envisioned form of historical literacy, as depicted by open coding, this history textbook activity was a blend between constructing knowledge from sources and using background content knowledge to acquire and discuss the answer. This activity was reliant on the role of the historian to facilitate the answers.

**Table 6.5    The Toolkit for Historical Literacy and the activities from *Making History Grade 10 Learner's Book*.**

Historical literacy criteria	Sub-category	Activities: A1 – A3 - <i>Making History Grade 10 Learner's Book</i>
Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• A1 - Historical understanding, why was trade so important to chiefs/kings - find in sources - not own understanding/knowledge, historical construction</li> <li>• A1 - No 3 is vague - own knowledge or sources?</li> <li>• A2 - no background knowledge needed - just understanding the sources.</li> <li>• A3 - balanced in terms of its argument -knowing and understanding how and what were needed. Learners use their own knowledge too.</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• A1 - Understanding constructed from different sources</li> <li>• A2 - multiple source to construct an argument.</li> <li>• A3 - multiple sources to analyse the answers</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• A1 - Use sources to identify the answer (1, 2, 4)</li> <li>• A2 - ALL of the sources were solely needed to find the answer</li> <li>• A3 - Source work for all of the questions.</li> </ul>
Historical concepts	Cause and effect  Time  Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• A1 (4) - cause and effect to a degree but otherwise no concepts - what do you see in picture that explains why trade led to warfare and organised military states - no knowledge needed, infer from source.</li> <li>• A2 - no use of concepts, just source-identification</li> <li>• A3 - no use of direct or explicit historical concepts</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No common response</li> </ul>
Historical consciousness	Linking the present/past/future  Making connections with the past	<ul style="list-style-type: none"> <li>• No common response</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No common response</li> </ul>

Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No common response</li> </ul>
Moral judgements in history	Empathy  Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• No common response</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No common response</li> </ul>

**The Toolkit for Historical Literacy and the activities from *Making History Grade 10 Learner's Book*.**

The common areas of response from the Toolkit for Historical Literacy and the activities centred on events of the past, narratives of the past, the historian's craft and historical concepts (which were visible in a minority of responses). Nothing was absent from the Toolkit for Historical Literacy that was in the activities. In addition, ICT-understandings, historical consciousness, contention/contestability, representational expression, moral judgements in history and applied science were left out.

In terms of knowing and understanding some of the questions were vague in terms of whether learners should use their own knowledge or whether the answer would be inferred from the range of previous sources. Two of the questions implied that learners should use background knowledge to answer the questions, but the remainder were mere understanding and interpretation was required. Ultimately, learners would have been able to answer the questions from the sources and understanding the event was favoured above knowing the event. Knowing and understanding events of the past was constructed after reviewing multiple narratives of sources. There was also no evaluation of sources in terms of subjective facts. The case for historical



literacy was that understanding of knowledge was favoured to knowing content knowledge.

The historian's craft was the one common element amongst all of the activities when compared to the Toolkit for Historical Literacy. The idea of sourcing was evident in all of the activities when learners had to sift through the various sources to ascertain the correct answer. In addition, learners had to use other sources to corroborate the existing information or to elaborate using different sources. Finally, the answer for each question was based on contextualisation of the source to ascertain the answer. The role of the historian was an integral and necessary component for the case of historical literacy, in this history textbook.

The use of historical concepts was not explicitly dealt with. Rather the historical concepts of cause, effect and change were inferred and implied, in one of the activities. The final question required that learners used the source to explain why trade led to warfare and organised military states. No background knowledge was needed, merely a thorough analysis of the source to account for the change in states. In addition, the use of concepts in A2 and A3 did not warrant an interrogation of the use of historical concepts, as answers could be gleaned from the sources. In the case of A3, learners had to decide for themselves the merits and practice of leisure time, but there was in essence no specification of time, cause and effect. However, alerting learners to these concepts, as promised in the preface and the jacket cover, may have been beneficial.

The historical literacy advocated by this activity was bound by learners being *au fait* with source-based questions and the role of multiple narratives. Together with the historian's craft, the use of multiple narratives was foregrounded for the case of historical literacy. Many sources concerning the

same historical event had to be reviewed in order to extract the relevant information. Historical concepts and knowing and understanding events of the past were additional factors of historical literacy, but to a lesser degree of importance.

The remaining classifications from the Toolkit for Historical Literacy were not touched on at all. The categories included historical consciousness, ICT-understandings, contention and contestability, representational expression, applied science in history and moral judgements in history.

This type of historical literacy was one-dimensional in the sense that it did not extend to any modern versions of historical literacy. The historical literacy was source-based (through the use of many sources) and skills-based with a slight indirect hint of historical concepts.

#### **6.2.3.2      *Looking into the Past - Grade 10***

The second set of activities was analysed from the history textbook, *Looking into the Past*, by Dyer *et al* (2008). The three sets of activities (B 1 – B3) covered a range of content. B1 was taken from the theme “The Quest for Liberty” and it explored the American Declaration of Independence. This activity was on page 131 and it was the fourth activity. There were three questions comprising this activity. B2 was an activity from the South Africa heritage chapter that detailed two questions concerning South Africa’s slave heritage. This activity was the seventh one on page 83. The final activity, B3 was a general historical skills-based activity that guided learners, through questions, regarding how to analyse a cartoon.

The activity, B1, required that learners had to read the excerpts from the Declaration of Independence, during the American Revolution, from a specific source and to then answer the particular questions. In terms of classifying the events of the past, B1 did not warrant that content was viewed in terms of subjective facts. It focused on understanding the event based on the provided sources. The first question required learners to infer meaning from the source to account for certain definitions. Thereafter, the second question involved a description of the new theory of government which originated from the first question. This entailed that learners had to understand the first source to answer the second question. Understanding the event was paramount to knowing about the event, as background knowledge was not required.

The first question required learners to explain four concepts pertaining to ideas from the Declaration of Independence. In order to successfully answer this question, learners had to thoroughly interrogate the source to unpack its possible meaning, so as to construct an argument. In this case, learners had to infer meaning from the source in terms of its context relating to the Declaration of Independence.

The second question asked learners to predict and describe the new theory of government put forward by the Declaration of Independence. In order to achieve success in this question, learners had to fully comprehend the gist of the source to envisage the proposed type of government after the Revolution.

Only a single narrative/source was used for this activity. The first two questions required that learners used the sources to infer meaning. The third also called for learners to review the source. However, it further called for an explanation of the effect of the information within the source.

The final question pertained to a painting of the fall of the King George statue. The question necessitated that learners had to view the source to provide possible reasons as to the meaning behind the fall of the statue. This question called for a careful analysis of the painting to identify the answers as well as background knowledge, even though this was not specified.

In essence, every question from the activity was source-based wherein knowledge had to be constructed from the source to answer the question. Despite the fact that knowing events of the past or knowing background content knowledge, I felt that a content framework of previous knowledge may have been beneficial for learners. However, answers could be gleaned from the text. The danger of such activities is that historical literacy may fall into the trap of reading studies instead of analysis of evidence. The historical literacy from this activity hinted at the historical concept of effect but was vague, whilst the historian's craft in terms of source and skills work was integral.

The second activity, B2, satisfied the final LO, namely LO4, Heritage. This activity was pair work. Learners had to discuss why slave heritage was largely ignored in South Africa. Two sources were provided as a stimulus to elicit a response. The second question required that learners had to account for ways to publicise slave heritage.

This activity had a definite political bias to satisfy the requirements of the NCS - history. Knowledge and a historical argument needed to be developed with a friend to understand and attribute the lack of effective heritage. In terms of historical literacy, this activity is politically geared to remain policy compliant. Sources were not stipulated for use. Rather they could assist learners if need be. Furthermore, no content knowledge was required.

The final activity, B3, was an activity to show learners how to effectively read and analyse a cartoon through guiding questions. This activity, like the previous one, had to be conducted in pairs. The promise of teaching learners

<b>Historical literacy criteria</b>	<b>Sub-category</b>	<b>Activities B1 - B3</b> <i>Looking into the Past - Grade 10</i>
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to read a cartoon was largely misrepresented. Learners had to analyse the source to decide who the character was and why he had grown so fat. If learners had no background knowledge, this would not have been possible. In addition, learners had to implore the use of historical concepts to potentially decipher reasons for the cartoon figure putting on weight. Furthermore, questions did not adequately guide the learners as to how to analyse the activity. In addition, the final question called for learners to decide the reasons engendering the European actions during the initial stages of colonisation. Again, this kind of question was not solely skills-based as promised but partly source-based and required a background knowledge.

The inferred form of historical literacy was source and skills-based, which required background knowledge for substantiation as well as an understanding of the historical concepts of cause and effect. However, this background knowledge was not warranted as the instruction called for learners to review the source to obtain the answer.

Events of the past	Knowing and understanding that the past is constructed of subjective facts	B1 - in conjunction with source, work out definition <ul style="list-style-type: none"> <li>• B1 - Use the sources to infer the theory of govt</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• B1 - Variety of sources to construct meaning</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• B1 - Use sources to answer the question (1, 3)</li> <li>• B2 - partly to review the historical intention of heritage</li> <li>• B3 - analysis of a cartoon</li> </ul>
Historical concepts	Cause and effect Time Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• B 3 - Change in government</li> <li>• B3 - colonial power getting fatter</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Historical consciousness	Linking the present/past/future Making connections with the past	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Moral judgements in history	Empathy Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>

**Table 6.6 The Toolkit for Historical Literacy and the activities from *Looking into the Past - Grade 10.***

## **The Toolkit for Historical Literacy and the activities from *Looking into the Past - Grade 10*.**

The type of historical literacy envisioned by the activity which correlated with the Toolkit for Historical Literacy concerned events of the past, the historian's craft and narratives of the past as well as historical concepts. B2 revealed an NCS - history-sanctioned activity which directly related to the LO 4, heritage, On the other hand, however, numerous historical literacy criteria were left out of the Toolkit for Historical Literacy. ICT-understandings, historical consciousness, contention/contestability, representational expression, moral judgements in history and applied science were left out. These findings were finalised after the interrogation of the other activities.

The learners were provided with two sources to infer meaning regarding the Declaration of Independence (B1) as well as B2, the slave heritage. This implied that learners would acknowledge that there were multiple narratives of the past to construct history. However, no direct mention was made to make learners aware of the multiple uses of sources, or the subjective nature of content construction.

B1 and B3 relied on the role of the historian in terms of source work to answer the questions. Learners had to construct the knowledge from the given sources so as to answer the question. Terms had to be defined – terms based on their usage in the Declaration. Furthermore, every single question could be answered from the sources, even though the second question from B1 did not specifically label whether the source must be used. This was apparent for B2 as well. The final activity required an essence of content knowledge to answer the cartoon, but which was not vital. Thus the inferred historical literacy relied heavily on source-based work to construct knowledge, rather than learning facts.

The final implied usage of the Toolkit for Historical Literacy was determined by historical concepts. Learners were not confronted with the specific terms of cause and effect nor with change. However; learners had to read sources based on the Declaration and the cartoon activity to foster possible arguments and account for the inherent change caused by those sources' events.

The activity from B2 was politically motivated to comply with the ideals of the NCS - history. This activity explored the fourth outcome of heritage to evaluate and rationalise the lack of slave history or heritage.

Finally, categories from the Toolkit for Historical Literacy which were ignored were historical consciousness ICT-understandings, contention and contestability, representational expression, applied science in history and moral judgements in history.

The view of historical literacy proposed by this activity was dominated by the historian's craft as well as the use of multiple narratives. To a lesser degree historical concepts was favoured. Despite the fact that learners could answer based on the sources, a measure of background knowledge would have been helpful.

### **6.2.3.3        *New Generation History - Grade 10 Learner's Book***

The final activities were taken from the *New Generation History 10 – Learner's Book* by Govender *et al* (2008) from Activity 5 (C1), page 168 from the theme of the Industrial Revolution detailing the Poor Law. C2 was an activity exploring the idea of the Divine Right of Kings on page 96, whilst the



final activity, C3, detailed the dispossession of the Khoi land in the Cape. These activities provided the final characterisation of historical literacy as per the three history textbooks' activities.

C1's activity was based on the New Poor Law which was characterised by the period of the Industrial Revolution. A table was provided which comprised dates, statistics and percentages. All of the information correlated with the New Poor Law. In addition, there were four questions that needed to be answered. Previous content or background knowledge was elicited from the third question as learners had to explain why the amount of money spent on poor relief decreased between 1833 and 1837. Due to the nature of the source being statistical, information had to be inferred and constructed from previous knowledge. Similarly, the final question required learners to write a paragraph wherein they decided whether or not the poor benefited from the system. This entailed that learners had to use what they had inferred from the source and to then marry that with existing knowledge to answer the question.

The idea of change, cause and effect played a role in the final question as learners had to decide whether or not people benefited from the Poor Law. Similarly, learners had to account for reasons why the amount spent on the poor decreased. Largely, answers could be partly inferred from the text, but a measure of constructing an argument through the interrogation of sources was needed.

Overall, this activity had varying levels of difficulty from calculating two questions which could be answered from the source, to the latter two questions being more challenging. These questions implied that learners had to have some kind of existing knowledge to answer the question. In addition, the source acted as a stimulus for the last two questions to bridge and infer meaning, which was partly reliant on knowing the section of history. Therefore

the implied historical literacy focused on the historian's craft and historical concepts.

The second activity, C2, included one source pertaining to the concept of the Divine Right of Kings. The rationale behind the activity was to explain the concept of the Divine Right of Kings with regard to France. Three questions were included which explored the concept further.

The first question was reliant on the learner's interpretation of the source so as to detail what was meant by the concept of Divine Right of Kings. This answer could be found in the source and required no knowledge of the concept, just skills to decode the meaning.

The second question required learners to develop a historical argument, beyond the meaning of the source, which implied understanding of the event from the past. The historical concept of cause and effect was implored in this question too, as learners had to account for reasons why the concept of the Divine Right of Kings had the potential of being undemocratic. Similarly, the final question was another extension of the first and second question wherein learners had to explain how rulers abused the concept. To a certain degree, this question was vague as it did not specify whether one had to get the response from the source or from background knowledge. Either way, the concepts of cause and effect would need to be used indirectly to answer the question. Knowing and understanding the concept of the Divine Right of Kings would have been useful for learners.

The type of envisioned historical literacy dealt with the craft of the historian in dealing with the source. However, the fact that it was one source did not provide another interpretation of the Divine Right of Kings. Moreover, the

activity was vague in terms of whether background knowledge was required or whether meaning had to be inferred from the source. Infiltrating the questions were the historical concepts of change, cause and effect to make and negotiate meaning. However, this too was vague and not specifically mentioned.

The final activity (C3) reviewed the dispossession of Khoi land after the arrival of the Dutch. Five questions were used and the instruction of the activity alerted learners to the fact that they must use the source to answer all of the questions.

The first question was a mere recall question instructing learners to name the indigenous people living in the Cape. Thereafter learners had to, in the second question, explain why van Riebeeck's arrival had adversely affected the Khoisan. This largely was detailed by the map or source illustration and partly from the learner's background knowledge (which was not asked).

The third question explored the concept of landownership from the Khoisan's perspective as well as from that of a Dutch settler. Despite the fact that this activity promised that all of the information was within this source, this question detailed that learners had to have some prior knowledge of the Khoisan and the Dutch to be able to answer this question.

The remaining two questions could be answered by scrutinising the source. The answers were on the map and could be inferred therein in order to construct a historical argument. The facilitation of the historical concepts of change, cause and effect were necessary for this question to truly understand the impact of the Dutch on the Khoisan's land.

The implied historical literacy from this activity is somewhat balanced in terms of knowing and understanding the event to effectively answer the question, despite the instruction that the source contained the necessary information. Moreover, this activity indirectly made use of the historical concepts of change, cause and effect. Overall, the historian's craft permeated the entire source-based activity.

**Table 6.7 The Toolkit for Historical Literacy and the activities from *New Generation History - Grade 10 Learner's Book* .**

Historical literacy criteria	Sub-category	Activities – C1 – C3 <i>New Generation History - Grade 10 Learner's Book</i>
Events of the past	Knowing and understanding that the past is constructed of subjective facts	<ul style="list-style-type: none"> <li>• C1 - Why do you think ... historical understanding from what has been in the sources (c)</li> <li>• C1 - Construct written piece based on the accumulated meaning from the source (d)</li> <li>• C2 - understanding a concept to explain it (background knowledge needed)</li> <li>• Recall of information</li> <li>• C3 - background knowledge of Khoisan and Dutch impact</li> <li>• No mention of subjective facts</li> </ul>
Narratives of the past	Understanding history is constructed from multiple narratives	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
The historian's craft	Heuristics (sourcing, corroboration and contextualisation)	<ul style="list-style-type: none"> <li>• C1 - A and B - use sources to infer meaning</li> <li>• All - Only one source used</li> <li>• Single sources used for all of the activities</li> </ul>
Historical concepts	Cause and effect  Time  Understanding change and continuity over time	<ul style="list-style-type: none"> <li>• C1 - Cause and effect to an extent (cause – New Poor Law) effect decrease in paupers (d)</li> <li>• C2 - change, cause and effect of Divine Right of Kings</li> <li>• C3 - change, cause and effect of Dutch impact</li> </ul>
ICT - understandings	Using and understanding ICT-based resources	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Historical consciousness	Linking the present/past/future  Making connections with the past	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Contention/contestability	Public and professional historical debate	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>

Representational expression	Understanding history through art and media of the past	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Moral judgements in history	Empathy  Developing a moral and ethical framework of the past.	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>
Applied science in history	Use of science to analyse history	<ul style="list-style-type: none"> <li>• No common responses</li> </ul>

**The Toolkit for Historical Literacy and the activities from *New Generation History - Grade 10 Learner's Book* .**

The Toolkit for Historical Literacy revealed a number of key and defining points for the case of historical literacy concerning the history textbook activity from *New Generation History - Grade 10 Learner's Book*. The Toolkit for Historical Literacy exposed a number of criteria that were missing from the activity. The factors of ICT-understandings, narratives of the past, historical consciousness, contention/contestability, representational expression, moral judgements in history and applied science were left out.

In terms of events of the past, learners were required to review each of the single sources and to account for possible reasons why there was subsequent change, its cause and the effect thereafter. In addition, learners had to construct a written argument, based on their accumulated meaning from the sources. C2 and C3 specified the use of the source to answer the relative questions. However, I felt that the use of sources, solely to construct knowledge, would not have been ideal, since a background framework of content knowledge of the activity would have been more suitable. The final question necessitated that learners had to construct a historical argument in the form of an extended writing piece to decide whether they agreed or

disagreed with the question. Therefore knowing and understanding was vital for this history textbook in terms of understanding its historical literacy. However, the degree to which element (understanding or knowing) was vague. I think the history textbook's intention was for learners to understand the context and content, based on the source. However, this would have been difficult and somewhat problematic to decipher.

This history textbook's activities also suited the category of historical concepts, and learners had to constantly review the source and then account for the inherent changes. Learners were supplied with the origin of the cause and then had to decipher the effect. It must be made clear that none of these historical concepts were specifically called for or warranted. However, without knowledge of these secondary concepts, these questions would have been inaccessible. The questions from *New Generation History - Grade 10 Learner's Book* could be answered from the sources. However, knowing and understanding the context of the source was helpful, but the questions to a certain degree required learners to know that context. Overall, knowledge of historical concepts and the context surrounding the sources were valuable tools of historical literacy for this activity.

There was a number of noticeably missing historical literacy criteria from the Toolkit for Historical Literacy that were not evident in the activities. Historical consciousness, ICT-understandings, multiple narratives contention and contestability, representational expression, applied science in history and moral judgements in history did not feature in any of the activities from the three history textbooks.

#### **6.2.3.4 Comparison of the activities by the Toolkit for Historical Literacy to reveal the envisioned historical literacy**

Historical literacy, as revealed by the nine activities, from the history textbooks could largely be characterised by knowing and understanding the past, which was informed by historical concepts and underpinned by the historian's craft.

In all of the activities, the role of the historian in terms of sources and historical skills was central to every activity. In some cases only one source was used, whilst in others a number of skills were used. The majority of the activities solely relied on the answers from the text, similar to that of a comprehension in English or a reading text, which negated the historical value. In terms of constructing historical arguments, background knowledge would have assisted learners. However, the majority of instructions told learners to solely use the source. Three of the activities instructed learners to identify specific sources to ascertain and isolate certain information which was the basis of the question. Therefore the case for historical literacy is an undeniable reliance on sources to make historical meaning, through the craft of the historian.

The use of historical concepts was never directly mentioned in any of the activities, but they were implied in the questions learners had to answer. Furthermore, being Grade 10, the first year of the FET band, learners should have been exposed to historical concepts and historical concepts should have been explicitly foregrounded for learners to interpret. In addition, in only one case more than one source was used, which isolated learners from viewing the past from multi-perspectives. In terms of historical literacy, historical concepts were an indirectly implied factor for historical literacy.

One of the activities from *Looking into the Past - Grade 10* dealt with heritage of the slave labourers in Cape Town. This activity reiterated the preface and



the jacket cover's intention of being NCS - history-compliant in terms of satisfying the LO of heritage.

Overall the historical literacy portrayed by the activities detailed a heavy reliance on the historian's craft in terms of source-based questions. In the majority of the activities, content knowledge was negated in favour of understanding the event rather than knowing it. No attention was drawn to the subjective nature of facts either. Although the issue of historical concepts was not directly dealt with, all of the activities to some extent dealt with the issue of cause and effect as well as change. Finally, only one activity consisted of a single source, whilst the others use multiple narratives depicting the same event. Historical consciousness, ICT-understandings, contention and contestability, representational expression, applied science in history and moral judgements in history were not dealt with at all.

### **6.3 A conclusion to the type of historical literacy espoused by Grade 10 history textbooks**

The investigation of the Grade 10 history textbooks was of paramount importance for this study as it informed the entire study. The background for this study was provided by the previous chapter (Chapter 5) wherein the brief context of the NCS - history was provided as well as a thorough analysis of the history textbook authors' views of historical literacy. The Grade 10 history textbooks are the final journey of the history textbooks from the origin of the NCS - history to the interpreters of the curriculum.

The historical literacy from the history textbook analysis of the jacket cover, preface and the activities revealed a number of common areas as well as a

few discrepancies concerning what was promised in the prefaces and jacket cover but did not materialise in the activities.

An initial area of compliance between the three areas of the history textbooks was the role of the historian. All of the history textbooks advocated a clear source-based philosophy to empower the learners. The history textbooks relied on sources in all of the activities to ensure historical meaning was made and a historical argument was subsequently constructed. This view of a source-based methodology was instilled in every area of the history textbooks. The view of historical literacy dictated that learners became apprentice historians.

The reviewing of the discourse of the Grade 10 history textbooks as well as the common theme of political reliance on the NCS - history reiterated that all criteria for historical literacy of the history textbooks were wholly policy-compliant. The jacket covers and prefaces were openly subservient to the NCS - history in quoting and endorsing the requirements from the DoE. Furthermore, this was evident in one of the activities which incorporated the LO of heritage to remind South Africans about slavery. Overall, a common thread which was woven throughout each of the history textbooks was political compliance with the NCS - history.

In keeping with the notion of a source-based and skills-based methodology, the idea of understanding versus knowing provided a fascinating debate. The prefaces and the jacket covers clearly promoted that understanding a historical event was more important than actually knowing or learning it. All of the history textbooks argued a source/skills-based methodology to succeed in their history textbooks instead of a content framework. In addition, all of the activities instructed learners to obtain their answers from the relevant sources. However, a minority of questions relied to some degree on learners to have a

sense of background knowledge or some kind of content framework to answer the questions. Despite advertising historical literacy as merely understanding past events, the activities required a measure of content knowledge. The case for historical literacy illustrated that learners cannot merely be aware of the past; in some cases, it is necessary to have a background or contextual framework.

In terms of the jacket covers and the prefaces, the public, learners and teachers were promised the use of multiple sources to interrogate the construction of history or an event. However, there were only two activities which facilitated the use of more than one source. Nevertheless, none of the questions inspired a critical look at possibly varying interpretations. Therefore the promise of multiple narratives was not sustained.

The areas of historical literacy concerning historical concepts, moral judgements in history and applied science were initially mentioned in the prefaces and jacket covers. However, they were not sustained throughout. Historical concepts are mentioned throughout the jacket covers and prefaces as being a critical component of historical literacy. However, the secondary historical concepts of change, cause and effect are not directed in any of the questions. There was a clear disparity in terms of the preface, jacket cover and the activities as to what is important for learners to know in terms of historical concepts. Ironically, the prefaces and one jacket cover endorsed the importance of empathy as being a critical goal of the particular history textbooks in terms of historical literacy. However, none of the activities featured any exploration of empathy or the moral judgements of history. Unlike historical concepts, which were inferred, no mention of empathy progressed in the history textbooks. Furthermore, applied science was endorsed by a history textbook in its preface to endorse history as a study of palaeontology, archaeology and genetics, as espoused by the NCS - history. However, this did not materialise in the activities. The lack of effective

historical literacy from historical concepts, moral judgements and applied science was indicative of history textbooks paying lip service to the NCS - history. However, the momentum of this lip service halted by the time it got to the activities which did not explore any of these factors for historical literacy.

Finally, the historical literacy advocated by the Grade 10 history textbooks is a far cry from the international version of historical literacy. No modern features of historical literacy (ICT-understandings, representational expression, applied science, contention and contestability and historical consciousness) are represented. Moreover, more traditional features of historical concepts of change, cause and effect as well as a means of morally judging the past through empathy are missing or not appropriately dealt with. Historical literacy in Grade 10 history textbooks is functional in terms of sourcing, contextualising and corroborating information so as to understand an event rather than know it. Historical skills are needed to complete this process. Ultimately, the type of historical literacy found in Grade 10 history textbooks is reminiscent of the SHP. Historical literacy in South African Grade 10 history textbooks is not evolving or dynamic and it does not meet the requirements of the international version of historical literacy. However, it does partially satisfy the NCS - history requirements for historical literacy.

## **FINDINGS, RECOMMENDATIONS AND CONCLUSIONS**

### **7.1 Introduction**

In the conclusion of this thesis a number of key factors were discussed to fully comprehend the conceptual importance of the study as well to understand the implications of the study. Thereafter, the findings and discussions were interrogated and presented in order to come to a deeper conceptual understanding. This process of writing the final chapter was crucial to tie up my thesis in terms of theorising and discussing the findings, identifying the weaknesses or limitations and suggesting recommendations for this body of research. In addition, the implications of the possibility of further study were reviewed (Mouton, 2001). Finally, concluding remarks of the value of the study in terms of the type of historical literacy found in Grade 10 history textbooks were presented and conceptualised (Mouton, 2001).

### **7.2 Findings**

My methodology was qualitative in nature and informed by an interpretivist paradigm. The qualitative research approach was chosen as I had a smaller sample group to engender rich data. In addition, the use of a qualitative research approach allowed me to best analyse and retrieve contextually strong data (Mouton, 2001). An interpretivist approach allowed me to, within the qualitative realm, analyse the data. Thereafter I was able to better understand the world I function in, both as an academic and a teacher. My data sources were the NCS - history, the history textbook authors' responses and three purposively selected Grade 10 history textbooks.

#### **First research question**

The initial research question was a means of establishing the kind of historical literacy espoused by the NCS - history. This research question was: "What kind of historical literacy is envisioned by the NCS - history?" The intention with this research question was not to thoroughly explore the NCS - history in terms of the entire document, but rather to review to identify the spirit of the historical literacy featured in the NCS - history. Data needed to be analysed for this data source. Open coding was applied to the NCS - history to uncover common themes, patterns and trends relating to historical literacy. In addition, discourse analysis, as per Fairclough's analytical instrument, was used to understand the context of the discourse with regard to the NCS - history.

The answer to the first research question regarding what kind of historical literacy was envisioned by the NCS - history was revealed in the analysis of Chapters 2 and 3 of the document. The gist of the NCS - history's historical literacy was depicted by historical skills, historical concepts and a source-based methodology. This historical literacy was underpinned and purported by the four LOs, namely historical enquiry skills, historical concepts, knowledge construction and communication as well as heritage. Once mastery in the first two LOs, which were functional, has been achieved, learners should then be able to construct historical knowledge.

The NCS - history's version of historical literacy is that of a functional competence to employ the craft of the historian in terms of skills, concepts and knowledge construction. The historical literacy required to function as a historian was therefore determined by historical skills and historical concepts. The NCS - history advocates skills and concepts at the core of its historical literacy with historical knowledge construction and heritage as its periphery. All subsequent historical skills and concepts are therefore necessary to ensure learners will act as historians. The NCS - history's version of historical literacy promotes understanding events rather than knowing them. This was reinforced by the use of numerous sources to construct knowledge. Another key finding was that a political dimension of the envisioned historical literacy

came to the fore in the final LO of heritage. This LO of heritage is a significant indicator concerning the political aspirations of the government, through the NCS - history with regard to history education. The analysis of this data source confirmed the political influence of the NCS - history as a curriculum document. The DoE Textbook Panel endorses all history textbooks in South Africa, on condition that these history textbooks are an interpretation of the NCS - history. As a result of this political or government sanctioning, this document needed to be interrogated to better understand the nature of its influence on the history textbook authors and thereafter the Grade 10 history textbooks.

Overall, the NCS - history's version of historical literacy, as interpreted from the first research question, was basic and fundamental in terms of skills and concepts. Lesser importance was placed on knowing the past; rather understanding the past was favoured. Historical skills and historical concepts surmount knowledge construction, proving "doing" history is more important than "knowing" history. Another dimension of historical literacy proposed by the NCS - history is that of heritage which is political in its intent. The NCS - history's historical literacy is skills and concept-driven rather than content-based. The review of the NCS - history's version of historical literacy provided a solid foundation for the rest of the study as it provided a context wherein history textbook authors as well as the production of Grade 10 history textbooks functioned. In addition, the historical literacy from the NCS - history is traditional in its approach.

## **Second research question**

The history textbook authors' view of the purpose of school history was the second research question. This research question was: "What do the history textbook authors of the Grade 10 history textbooks view the purpose of school

history to be?” The intention of this question was to better understand the thought and belief-processes of the generators of history textbooks. Data for answering this question was obtained from Grade 10 history textbook authors’ responses to the question pertaining to the purpose of school history. The use of the phrase, the purpose of school history, should be seen as a metaphor for historical literacy in the sense that it is an interpretation of the purpose of school history. This research question was imperative to the study as it provided the bridge between the NCS - history and the Grade 10 history textbooks, as the authors were the interpreters of the curriculum and the subsequent generators of history textbooks. Open coding was used to establish the emergent trends and patterns regarding the historical literacy engendered from the responses. Thereafter, the history textbook authors’ responses were categorized according to their understanding of historical literacy. In order to gain a conceptually deeper insight into the type of historical literacy, the findings of the various parts of historical literacy were run against the Toolkit for Historical Literacy to theorise and better understand the findings.

The second research question elicited the responses to the purpose of school history which could indirectly be interpreted as historical literacy. The findings regarding this question were that history textbook authors were largely policy compliant and generally mirrored the essence of the NCS - history. However, there were a few additional factors of historical literacy which did not feature in the NCS - history. The version of historical literacy from the history textbook authors was bound by the historian’s craft, historical concepts, moral judgements, narratives of the past and knowing and understanding the past. The kind of historical literacy identified by the second research question not only adhered to the necessary LOs and ASs, it was also more diverse.

A defining characteristic of historical literacy from the authors was the category of historical skills and the use of sources. Historical skills and



sources were paramount for historical literacy in the sense that all subsequent actions within the discipline could not occur if learners were not *au fait* with these two components of historical literacy. Another dimension of historical literacy was the notion of content knowledge. Despite the fact that a debate exists concerning the issue of historical content, it was an important factor for the case of historical literacy. Some of the respondents advocated the importance of learning facts to increase a learner's conceptual knowledge, whilst others preferred a combination of knowing and understanding past events so as to facilitate historical literacy. Thirdly, historical concepts were another feature of the historical literacy advocated by the history textbook authors. Without historical concepts, learners would not be able to develop a moral and ethical framework or understand disciplinary concepts. The role of the historian was another crucial factor of historical literacy. In order for learners to be considered historically literate, they had to employ the skills and concepts of a historian to construct knowledge. A minority of history textbook authors isolated the issue of politics as being a crucial component of their view of historical literacy in that the role of the author and the government were inextricably bound to deliver proposed or government-sanctioned content. History textbook authors seemed to acknowledge that part of the purpose of school history is to be confronted with bias and indoctrination, but they seem unsure of how to deal with this facet being a part of historical literacy.

The overall depiction of history textbook authors' version of historical literacy was more traditional in its nature and, like the NCS - history, did not feature on current international versions of historical literacy. Historical literacy is traditional in the sense that it focuses on historical skills, historical concepts and historical knowledge, which seems to be a remnant of the SHP view from the 1970s and 1980s, whilst contemporary criteria from The Toolkit for Historical Literacy, together with the literature review, identified core areas of historical literacy which facilitated the more traditional ideas of historical literacy, but also illustrated a number or more contemporary or current trends

regarding historical literacy. Examples of current factors of historical literacy include ICT-understandings, applied science, representational expression and contention and contestability. These contemporary criteria did not feature in the responses from the history textbook authors, which strengthens the argument for historical literacy being more traditional in its nature. A term of historical literacy, as used in the Toolkit for Historical Literacy, was mentioned by a respondent. However, his/her use of the term seemed to clash with its contemporary use. This term was historical consciousness. The term was used as goal of attainment for learners instead of the more traditional and internationally used context of the concept. However, I suspect their depth of conceptual understanding was lacking. In addition, the use of the term “historical consciousness”, was a kind of “lip service” or verbal allegiance in reply to the ideal historical literacy and the responses. The true understanding of this kind of concept could only be determined by the analysis of Grade 10 history textbooks.

This data source analysis from the second research question was essential to the study as it allowed me to understand the history textbook authors’ comprehension of historical literacy. Historical skills, historical concepts, understanding and knowing the past, moral judgements in history and a source-based methodology, was the encompassing form of historical literacy from the Grade 10 history textbook authors.

### **Third Research Question**

The third and final research question was: “What kind of historical literacy is espoused by the Grade 10 history textbooks?” The progression of this question, in terms of the study, was vital. Once the NCS - history’s version of historical literacy and the history textbook authors’ envisioned view was ascertained, I could analyse the type of historical literacy in Grade 10 history

textbooks. Thereafter, the final resolution of the study could be formalised after interrogating the Grade 10 history textbooks to discover the inherent type of historical literacy. Open coding was applied to the entire data source to uncover common themes, patterns and trends relating to historical literacy. In addition, discourse analysis, as per Fairclough's analytical instrument, was used to understand the context of the discourse with regard to the NCS - history and the prefaces and jacket covers of the history textbooks. In order to prevent the possibility of doing a content study, I chose the jacket covers, the preface and three activities per history textbook to interrogate the inherent type of historical literacy. The analysis of the activities provided an ideal opportunity to test or measure the form of historical literacy as proposed in the jacket covers, the prefaces and the responses from the history textbook authors. Thereafter, in order to gain a conceptually deeper insight into the type of historical literacy, the findings of the various parts of historical literacy were run against the conceptual Toolkit for Historical Literacy to theorise and better understand the findings.

The final findings of historical literacy from the Grade 10 history textbooks were narrowed to the craft of the historian in terms of source-based work and historical skills. In addition, permeating throughout the Grade 10 history textbooks was a constant reminder of their subservience to the NCS - history. The jacket covers' inherent form of historical literacy was skills-dominant. Content in terms of knowing and understanding past events was largely ignored, except for the public endorsement of history textbooks adhering to NCS - history content. However, the impetus of knowledge was placed on understanding and not on learning or knowing facts. Furthermore, the historical concepts were implied, but not directly stated. On the whole, the version of historical literacy presented by the history textbooks' jacket covers was dominated by the historian's craft. This was evident in the history textbooks by presenting their textbooks as an endorsement of their source-based methodology. The historical literacy, as found in the jacket cover, was one-dimensional in a sense that it was proposed as a functionality of the

discipline. Moreover, it is one-dimensional in that no contemporary criteria were facilitated.

As with the jacket covers, the historical literacy, as envisioned by the history textbooks' prefaces, revealed a functional assertion that provided learners with skills to decode multiple sources to construct knowledge as grounded by the historian's craft. In addition, the categories of moral judgements, historical concepts and applied science, were mentioned fleetingly, but they were not developed. These factors of historical literacy needed to be tested in the activities to measure the degree of conceptual understanding and application. There was a definite political subservience to the NCS - history. Contemporary factors of historical literacy were lacking. Overall, the historical literacy, in the prefaces, was NCS - history-inspired in its functionality and hints of the remnants of the SHP.

The historical literacy portrayed by the activities detailed a heavy reliance on the historian's craft in terms of source-based questions. Despite advertising historical content as merely understanding past events, the activities required a measure of content knowledge. The case for historical literacy illustrated that learners cannot merely be aware of the past; in some cases it is necessary to have a background or contextual framework. No attention was drawn to the subjective nature of facts either. Although the issue of historical concepts was not directly dealt with or elicited in any of activities, all of the activities to some degree dealt with the issue of cause and effect as well as change. Multiple narratives were largely used to depict the same event for learners to construct an argument. As with the previous two categories of history textbooks, current criteria for historical literacy were not evident.

Overall, Chapter 6 provided a basis for my findings and discussions as it revealed discrepancies and similarities between the NCS - history, the history

textbook authors and the Grade 10 history textbooks. An initial area of compliance between the three areas of the history textbooks was the role of the historian. All of the history textbooks advocated a clear source-based philosophy to empower the learners. Ultimately, the type of historical literacy found in Grade 10 history textbooks is reminiscent of the SHP as this was how many of these history textbook authors were trained in the 1970s and 1980s. Historical literacy in South African Grade 10 history textbooks is not evolving or dynamic and it does not meet the requirements of the international version of historical literacy. However, it does partially satisfy the NCS - history requirements for historical literacy. More traditional features of historical concepts of change, cause and effect as well as a means of morally judging the past through empathy are missing or not appropriately dealt with. Historical literacy in Grade 10 history textbooks is functional in terms of sourcing, contextualising and corroborating information so as to understand an event rather than to know it. Historical skills are needed to complete this process.

As stated above, a number of discrepancies were identified between the jacket cover, the preface and the activities. Firstly, the development of historical concepts and a moral and ethical framework was proposed in the jacket covers and the prefaces. However, it fell short of credibility in the activities. This shortfall was a result of the fact that the notion of empathy was not dealt with at all in any of the activities. Furthermore, historical concepts were indirectly implied. However, learners would never have been aware of them. Another discrepancy was apparent in terms of knowing and understanding the past. The prefaces and the jacket covers espoused a source-based methodology to construct knowledge. In addition, even the activities instructed learners only to use the sources. However, some of the questions clearly required a content framework with which to refer. In promoting a source-based methodology solely to understand instead of knowing too, learners would be experiencing a disservice of true historical literacy and historical understanding. The final obvious discrepancy was the fact that the prefaces and the jacket covers promised multiple narratives,

sources and evidence to supply a platform for learners to interrogate the construction of the past. However, a minority of activities used more than one source and even then, no questions required learners to corroborate information with other sources. Therefore multiple narratives, although promised, did not feature in the activities.

The historical literacy espoused by the Grade 10 history textbooks was traditional in the sense that it was based on SHP-type methodology of sources, skills and concepts. No current criteria, as embodied in the Toolkit for Historical Literacy, were apparent, such as representational expression or applied science. At the core of the historical literacy manifested in Grade 10 history textbooks is a one-dimensional approach to skills, concepts and content.

### **7.3 Discussion**

The three research questions provided a structured and systematic means to eventually answer the study's overall question concerning the manifestation of historical literacy in Grade 10 history textbooks. The type of historical literacy found in Grade 10 history textbooks is distanced from the international version of historical literacy. Few current features of historical literacy are represented, as found by the Toolkit for Historical Literacy. Moreover, more traditional features of historical concepts of change, cause and effect, as well as empathy, are missing or not appropriately dealt with. Historical literacy in Grade 10 history textbooks is functional in terms of sourcing, contextualising and corroborating information so as to understand an event rather than know it. Ultimately, the type of historical literacy found in Grade 10 history textbooks is reminiscent of the SHP as it is skills-based. Historical literacy in South African Grade 10 history textbooks is not evolving or dynamic and it does not

meet the requirements of the international version of historical literacy. However, it does satisfy the NCS - history requirements for historical literacy.

All history textbooks need to meet the baseline criteria of the DoE Textbook Panel so as to satisfy the NCS - history criteria. As explored in Chapter 2 of this study, history textbooks had the potential of being a vehicle for the delivery of government ideals. In terms of the espoused historical literacy, Grade 10 history textbooks had a definite political bias towards the aspirations of the NCS - history. The prefaces and the jacket covers were overtly prescriptive of the fact that their history textbook was sanctioned by the NCS - history and that they fully subscribed to NCS - history requirements. The prefaces of all of the history textbooks included vast excerpts from the NCS - history chapters. These extracts detailed the aims of democracy, tolerance, aims from the Constitution and unity. The political current was evident in an activity too, wherein learners had to explore LO 4 in the section of heritage of Cape slaves. The history textbook authors are the interpreters of the curriculum (NCS - history) and the generators of the chapters in the history textbooks; therefore, their insight was valuable for this thesis. The overall responses from the history textbook authors concerning their historical literacy were comprehensive and it detailed many of the criteria in the Toolkit for Historical Literacy. One would assume that the respondents' extensive case for historical literacy would be translated to the history textbooks. However, and as acknowledged by some respondents, history textbook authors are bound by a political confine; that of the NCS - history. A minority of authors acknowledged the political role history textbooks played and the author's role therein. However, this awareness was not shared, nor would it make any difference, if the history textbook authors were bound by the confines of the NCS - history. Internationally, political criteria did not feature for the case of historical literacy. Ultimately, a definite factor for historical literacy was the political aspirations of the NCS - history.

The ultimate role of a history learner is to imple the craft of the historian (Taylor, 2003; Lee, 2004). This notion of historical literacy was depicted in all three data sources. The Toolkit for Historical Literacy used Wineburg's (1991) theory of heuristics to deal with sources. This was apparent in Grade 10 history textbooks as learners had to choose pertinent sources, corroborate findings with the question (not other sources) and contextualize the information in the form of an answer. Instilled in this process of heuristics were many historical skills identified by the NCS - history and history textbook authors. The importance of historical skills was transferred to the history textbooks as well. The criterion of historical literacy concerning the craft of the historian, which was underpinned by historical skills, was laudably promoted and applied in the Grade 10 history textbooks.

The Grade 10 history textbooks revealed a concerning factor for the case of historical literacy. The conceptual Toolkit for Historical Literacy used the concept of knowing and understanding the past to explain the balance of historical literacy, which entailed having and developing a content framework, whilst using sources or evidence to understand the said framework (Taylor, 2003). The Grade 10 history textbooks overtly and publicly, in their jacket covers, endorsed a source-based methodology. This attitude of relying on sources to construct knowledge was reiterated in the prefaces and the instructions of the activities. Although using sources to construct knowledge is part of historical literacy (historian's craft), it needed to be balanced by knowing facts or information regarding the event too (Taylor, 2003; Lee, 2004). The danger of not advocating the importance of learning about events as well, is that learners will not benefit from the holistic advantage of being able to know and understand to construct a relevant argument. In terms of this historical literacy found in the Grade 10 history textbooks, it was in accordance with the NCS - history's LO 3 which did not advocate learning of content knowledge. The NCS - history's approach to content was revealed in the LO 3, Knowledge Construction and Communication. This LO and the ASs did not reveal any learning of content, only inferred meaning from sources.



This reliance on sources and skills to construct knowledge was exactly the paradigm Ravitch (1989) objected to in America. Her vehement argument was in response to the influence of the SHP, which was source and skills-based. Ravitch (1989) accorded the lack of a content framework to being the fault of the SHP. Ironically, the situation with regard to history textbooks, in South Africa, seemed to be experiencing a similar obstacle as the envisioned historical literacy was source-based and not balanced in terms of content. Historical literacy in Grade 10 history textbooks seemed to be littered with the same remnants of the SHP. Rabb (2004) cautioned the danger of not knowing content in terms of history by labeling such learners as being historically illiterate.

The final dimension of historical literacy in Grade 10 history textbooks is the fact that it is traditional and one-dimensional in its approach to history. These findings can be perused in Tables 6.1-6.7. The traditional view of historical literacy is the idea of skills, concepts and content, whilst more contemporary features are represented in the Toolkit for Historical Literacy. Core factors of historical literacy from the NCS - history, to the history textbook authors and the Grade 10 history textbooks are the craft of the historian, knowing and understanding as well as historical concepts. In addition, as stated above, the pendulum of emphasis swings to the side of sources, skills and understanding knowledge, which is representative of the SHP. This form of historical literacy is one-dimensional as it left out aspects of historical consciousness, moral judgements and multiple narratives. Current and international historical literacy research advocated the use of contemporary criteria for historical literacy. The use of applied science to understand history, contention and contestability, representational expression and ICT-understandings are global features of historical literacy (Taylor, 2003). However, none of these factors featured in the history textbooks. Granted applied science was remotely mentioned in terms of the purpose of the discipline with regard to genetics, paleontology and archaeology. Yet, it was never endorsed again. The

historical literacy found in Grade 10 history textbooks is traditional and one-dimensional.

The overall findings of the study were comprehensive. The craft of the historian and its necessary historical skills were a core component of Grade 10 history textbooks. This view of a source-based approach informed by skills is synonymous with Wineburg's (1991) argument of heuristics. In every facet of historical literacy found in the data sources and especially the Grade 10 history textbooks, the competence of historical skills, as an apprentice historian was foregrounded. In addition, understanding rather than knowing a past event was crucial for historical literacy, which entails that understanding content is better than learning it. Furthermore, the use of historical concepts, although not fully developed in Grade 10 history textbooks, warranted inclusion for the kind of historical literacy. Taylor (2003) and Lee (2004) also advocate the craft of the historian. However for these two historical literacy theorists, this is only one component of historical literacy. The role of the historian needs to be supplemented by other factors of historical literacy to be considered historical literate. These criteria, amongst others, are content knowledge, historical concepts, moral judgements and multiple narratives. The concept of personal empowerment as a core factor of historical literacy was established by Taylor (2003) and Lee (2004) as a crucial goal for a historically literate learner. Despite the fact that the prefaces and the jacket covers promoted the use of empathy and personal growth, the activities did not deliver on these promises. Furthermore, the current notions of historical literacy, as fully comprehended by Taylor (2003) in his historical literacy index, were lacking. These current features, namely contention and contestability, applied science, representational expression and ICT-understandings, did not feature in any measure in Grade 10 history textbooks. Historical literacy in Grade 10 history textbooks is traditional and functional, but not multi-faceted in terms of Taylor's historical literacy index. Lastly, the NCS - history's political influence on the landscape is the final component of historical literacy for

Grade 10 history textbooks which does not feature in any of the arguments purported by the historical literacy theorists.

#### **7.4 Limitations**

In the light of the summarised findings and the discussion, a few limitations were encountered and addressed in the methodology section of this thesis. A limitation of this study was the fact that I had a small sample group. Due to the fact that I only used Grade 10 history textbook authors it produced a narrowed sample group. I purposely chose to use Grade 10 history textbooks, as opposed to the remaining FET grades, as Grade 10 is the first year of history after their Grade 9 year of Human and Social Sciences. In addition, by virtue of the choice to investigate Grade 10 history textbooks, the views of only Grade 10 history textbook authors were necessary and again limiting. The views, opinions and perceptions of the purpose of school history (historical literacy) were those from willing respondents. By dint of the above, this study has presented a diminutive sample of the perspectives of the history textbook authors and their interpretation of historical literacy; therefore the study may be limited. However, it was necessary to establish the historical literacy of Grade 10 history textbooks.

Another potential limitation was that I was unable to generalise about some aspects of historical literacy in Grade 10 history textbooks. Due to the fact that the study is qualitative, I was mindful of the fact that generalisations were discouraged. However, the fact that my sample was limited and I was comparing and contrasting three Grade 10 history textbooks, generalisations were in some cases accepted. Moreover, every history textbook that I have used subscribed to the ideals of the NCS - history and therefore, theoretically, all the endorsed history textbooks would potentially yield similar information. Therefore, despite the fact, that generalisations in the remainder of the study

were discouraged, I was able to suppose information from the Grade 10 history textbooks as the Grade 10 history textbooks were confined by the NCS - history's requirements.

This thesis' intention was not to dwell on a content study, whilst some may have argued that it was necessary. The methodological implications of doing a content study would have sacrificed the ideals of the factors for historical literacy, as the conceptual findings would have been limited. Therefore, a potential limitation was the fact that no content was interrogated.

## **7.5 Recommendations**

In light of the findings of this study, the following recommendations can be made regarding the kind of historical literacy in South African Grade 10 history textbooks:

- Historical literacy, in Grade 10 history textbooks, should not solely be source and skills-based, it should also have a balance between knowing and understanding events of the past.
- Historical literacy, in Grade 10 history textbooks, should be indicative of historical concepts, moral judgements in history and historical consciousness.
- History textbook production should subscribe to international perceptions of the concept of historical literacy.

- Historical literacy in South African Grade 10 history textbooks should be more current or contemporary in the sense that international criteria of representational expression, ICT-understandings, applied science in history and contention and contestability should for example be included in Grade 10 history textbooks.
- History textbook authors should be trained with regard to historical literacy.
- Future Grade 10 history textbook production should involve teachers and not solely rely on the NCS - history to instil its form of historical literacy.
- History textbooks should be scrutinised by teachers and not solely the DoE.
- Granted, there should be a body to sanction history textbooks in terms of standards. However, this need not be the DoE - it could be an autonomous body. This would minimise the political emphasis that is evident in the Grade 10 history textbooks.

## **7.6 Implications for future research**

Historical literacy is a complex and evolving concept which still has many dimensions to examine. I would like to use this thesis as a grounding for a PhD in three possible areas:

- PhD in the benefit of a holistic form of historical literacy for learners.

- PhD in understanding the political nature or role of historical literacy in history textbooks.
- PhD in reviewing the role of assessment in measuring historical literacy.

## **7.7 Conclusion**

In light of the findings, limitations and recommendations, the research questions and the data analysis, a final summary of the discussion which informed the thesis' topic of how historical literacy is manifested in Grade 10 history textbooks, the following can be offered:

1. Historical literacy is manifested in the form of the historian's craft which is dominated by a source-based methodology and historical skills to interpret, question and construct historical arguments.
2. Historical literacy, in Grade 10 history textbooks, details understanding historical events from evidence rather than knowing or learning.
3. Historical literacy, in Grade 10 history textbooks, is politically-motivated to satisfy NCS - history requirements.
4. Historical literacy, in Grade 10 history textbooks, is traditional and one-dimensional in that it only focuses on core factors for historical literacy, while sacrificing others. No contemporary international versions of historical literacy are represented in Grade 10 history textbooks.

It is my contention that the findings of this study are groundbreaking in the sense that historical literacy is a new and evolving concept. No other study has been undertaken, locally or internationally, wherein historical literacy is investigated in terms of a South African context. Moreover, no study has analysed historical literacy in any format, especially regarding Grade 10 history textbooks. This study is valuable to the DoE to understand the importance of holistic, functional and multi-dimensional view of historical literacy. Furthermore, this thesis creates awareness for educational managers and teachers so as to enlighten them as to the importance of historical literacy. In addition, this thesis could assist history textbook authors to be responsive to other forms of historical literacy, not just government-prescribed historical literacy.

The overall merit of this thesis is that it exposed the traditional, one-dimensional view of the historical literacy in Grade 10 history textbooks. Furthermore, this study uncovered the role of the NCS - history in that by prescribing specific criteria for historical literacy, it actually hampers and diminishes the internationally accepted version.

In my estimation, the single biggest strength of this thesis was to identify and explore the plight of Grade 10 history textbooks in South Africa in terms of their degree of historical literacies. This thesis introduced South Africa to the concept of historical literacy and uncovered silences which can be solved with regard to historical literacy. Moreover, historical literacy was explored in its entirety and an analytical tool, the Toolkit for Historical Literacy, was developed which can be used to measure historical literacy in any history textbooks in South Africa. This study was functional, multi-disciplinary and educational in terms of historical literacy.

Historical literacy provides a wealth of historical tools to better know and understand the past, make connections with the past and thereafter to interpret the past, justly. The concept of historical literacy is an imperative concept for learners to master so as to experience successes in the discipline. Not only is it beneficial for a learner's role in the classroom; historical literacy is personally empowering and extends beyond the classroom.



## Appendix A



RESEARCH OFFICE (GOVAN MBEKI CENTRE)  
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30 SEPTEMBER 2009

**MRS. BJ WALLER (201506081)**  
**SOCIAL SCIENCES EDUCATION**

Dear Mrs. Waller

**ETHICAL CLEARANCE APPROVAL NUMBER: HSS/0660/09M**

I wish to inform you that your application for ethical clearance has been granted full approval for the following project:

**"How does historical literacy manifest itself in South African Grade 10 History Textbooks?"**

**PLEASE NOTE: Research data should be securely stored in the school/department for a period of 5 years**

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

.....  
**PROFESSOR STEVEN COLLINGS (CHAIR)**  
**HUMANITIES & SOCIAL SCIENCES ETHICS COMMITTEE**

cc. Supervisor (Dr. J Wassermann)  
cc. Ms. Govender

## Appendix B



HISTORY EDUCATION, SCHOOL OF SOCIAL SCIENCE EDUCATION  
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Sabie

1260

To Whom It May Concern

I am a History teacher who is currently completing her Masters in Education. I am doing a full thesis concerning historical literacy and their manifestation in history textbooks and I require insight from you as a history textbook editors and/or authors of Grade 10 history textbooks.

My title for my research is, "*The manifestation of historical literacy in Grade 10 history textbooks.*" This idea of historical literacy has been "brewing" for a few years. It began during my Honours at the University of KwaZulu-Natal (Edgewood Campus). I was introduced to the notion of historical literacy. This furthered my quest to understand this complex and vague concept both on a theoretical level as well as a practical level. Not only would it boast vital to my classroom practice but also by personal enquiry to ascertain what historical skills are necessary in order to be considered historically literate. Moreover, I am interested whether the concept of historical literacy is easily identifiable or even existent within South Africa's history classes through the use of

textbooks and more importantly what kind of historical literacy is evident. Historical literacy has various associated meanings, locally and internationally, however, my specific focus is determined by how it is manifested in South African textbooks.

In order to facilitate my research, I will be analysing the Department of Education's relevant documents pertaining to school history, especially the subject's National Curriculum Statement. Moreover, I have theorised the popular ideas of historical literacy. However, in order to understand more of the correlation between historical literacy and textbooks, I need "expert" help from the editors and authors concerning their ideas and insight into the purpose of school history.

I would like to implore you, as an author and/or editor, to assist me in understanding your ideas concerning the purpose of school history. Your opinions would be vital in reviewing how historical literacy manifests itself in Grade 10 history textbooks. Your participation is completely voluntary and anyone wishing not to participate is thanked in advance for any trouble taken. Furthermore, all response is highly confidential and pseudonyms will be employed to ensure absolute anonymity. Similarly, once my research has been completed all correspondence shall be shredded and/or deleted. As participation is voluntary, if at any stage participants would like to withdraw from the study, they should feel free to do so.

Your ideas, should you wish to participate, can be electronically communicated to me. Any queries and concerns can be addressed to me or my supervising, lecturer, Doctor Johan Wassermann (all contact details below). Participation should be no longer than one month.

Brenda Waller (Masters Student)

Email: [@gmail.com](#)  
Cell: 084 811 4889  
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Doctor Johan Wassermann (Supervising Lecturer)

Email: [@ukzn.ac.za](#)  
Land Line: 031 – 260 3484

Kind Regards



Brenda Waller

**Declaration**

I ..... (full names of participants) hereby confirm that I understand the contents of this document and the nature of the research project, and I consent to participating in the research problem.

I understand that I am at liberty to withdraw from the project at any time, should I so desire.

.....

Signature of Participant

.....

Date





## Appendix C

### A1

It seems increasingly probable that these changes occurred in response to the development of external trade at Delagoa Bay. Look at the map on page 209 and see where the chiefdoms were situated in relation to the trade route to Delagoa Bay. Conflict developed between chiefdoms trying to gain control of the valuable ivory trade. Chiefs with a strong military system were able to control the production of and trade in ivory over a wide area. They were also able to use their armies to extend their power over smaller communities.

A trading alliance with the Maputo, who lived in the region of Delagoa Bay, supplied Dingiswayo with a small force of Maputo men armed with guns. This enabled him to open a direct trade link with Delagoa Bay.

There was intense rivalry between the Mthethwa and the Ndwandwe and, by 1810, this rivalry dominated the region. At this time, Shaka kaSenzangakhona was chief of the small Zulu clan which paid tribute to Dingiswayo. He had spent some years in one of the Mthethwa regiments and, with Dingiswayo's support, he had been able to take over as chief after his father died.

A major clash between the Ndwandwe and the Mthethwa in 1817 resulted in Dingiswayo's death. The defeat and breakup of the Mthethwa chiefdom left the way open for Shaka to extend his power in the region. Shaka has been the central figure of most histories of this period.

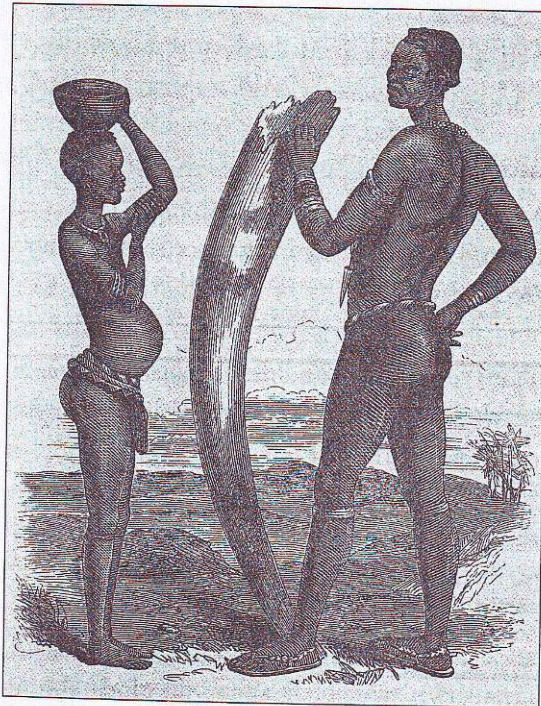
#### SOURCE C

'Dingiswayo now collected several Delagonians who were in the habit of bringing small quantities of beads to barter [trade] among his and neighbouring tribes. Such bartering he now claimed as a personal privilege. He rewarded them well for their beads and sent chiefs with presents of oxen and ivory to the Portuguese . . . In the first year of his chieftainship he opened a trade with Delagoa Bay, by sending 100 oxen and a quantity of elephants' tusks to exchange for beads and blankets.'

(Henry Francis Fynn, trader and explorer, early 1800s)

J. Stuart & D. Malcolm (eds),  
1950. *The Diary of Henry Francis Fynn*, Shuter & Shooter

#### SOURCE D



*The ivory carriers*

#### ACTIVITY

1. Why was trade so important to chiefs/kings? Which sources explain this?
2. What trade goods were being exchanged? Name the sources that identify them.
3. How would participation in external trade have led to conflict?
4. Look at Source D. What do you see in the picture that helps to explain why trade led to warfare and organised military states?



**SOURCE F**

*The Tlhaping village of Dithakong as it appeared to a European painter in 1801*

**SOURCE G**

Cobbing...forces us to look in a new light at the historical significance of European settler demand for African labour in the Eastern Cape. But in arguing that missionaries like Robert Moffat...were involved in conspiracies to raid slaves he is straining the evidence...

J. Wright, 'Beyond the concept of the 'Zulu Explosion', in C. Hamilton (ed), *Mfecane Aftermath*, p. 110

**SOURCE H**

The imagery of the Griqua before 1823 as slave and cattle raiders whose attacks [according to Cobbing] 'had been going on for years' is difficult to validate. The majority of Griqua were restrained from illegal trading and raiding by the leading families.

G. Hartley, 'The Battle of Dithakong and "Mfecane" Theory' in C. Hamilton (ed), *Mfecane Aftermath*, p. 411

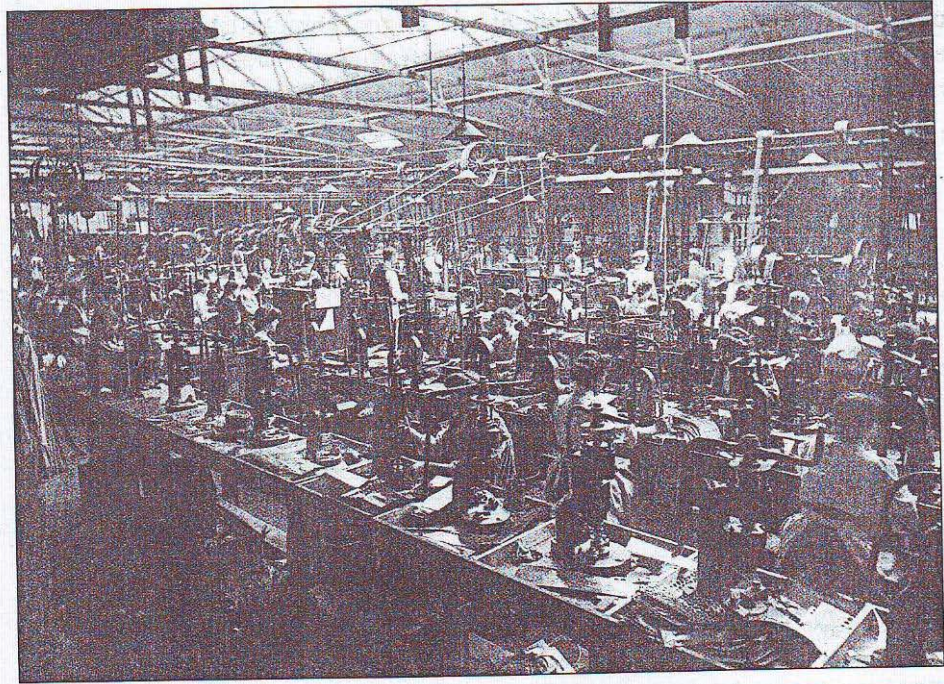
**ACTIVITY**

1. Identify the sources that suggest that the Griqua and other similar groups raided African communities in the interior, causing widespread violence, disruption and migration.
2. Look carefully at the picture of Dithakong painted in 1801. Could this town be defended easily or not? Dithakong was attacked in 1823, twenty-one years after this picture was painted. Do you think that it is likely that it would still look like this? Support your answer.
3. Which two sources help to explain how 100 Griqua managed to defeat a powerful attacking army at the battle of Dithakong and kill 500 Sotho without losing a single man?
4. Which two sources oppose the idea that the Griqua and similar groups were responsible, with or without the help of missionaries, for widespread violence in the interior in order to obtain slaves for the farmers of the Eastern Cape?

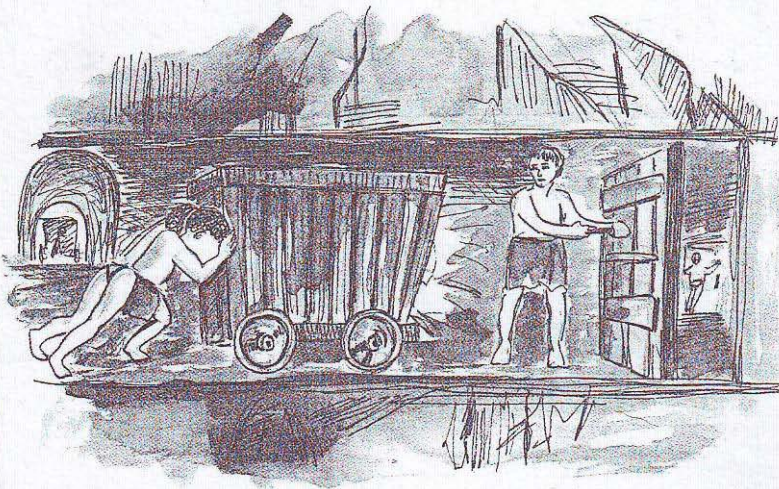


**SOURCE B**

*A later photograph of a button factory*



**SOURCE C**



*A child working in a mine*



In the early factory system, workers had few rights and many rules. There were no labour organisations or government laws to regulate employers. Factory owners were free to do what they wanted in order to increase their profits. Many factories employed children, who often worked long hours doing dangerous tasks.

But the factories were not the only site of labour in the Industrial Revolution. Coal mines also expanded greatly. In earlier years coal was mined at the surface but, as the demand grew and technology developed, mine owners began to dig deep mines. Mineworkers, many of them children, became underground labourers, working the entire day without seeing daylight. Underground mining also had its own set of dangers – explosions and cave-ins were common.

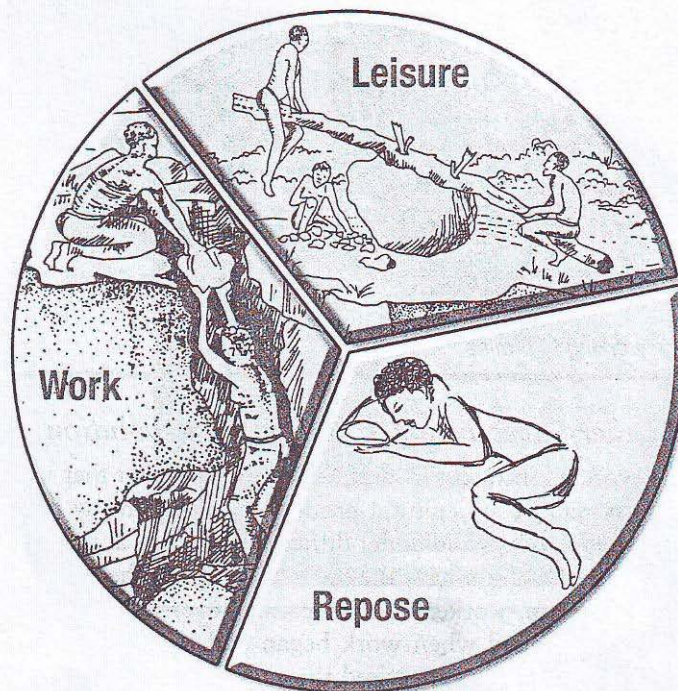
So, while the factories and mines were efficient, they were often not pleasant places for those who worked in them. But while workers suffered certain hardships, large factories and mines offered them some advantages. Since so many workers were gathered in a single workplace there were opportunities for them to come together in order to fight for better working and living conditions. In this chapter we will look at how the Industrial Revolution changed the lives of ordinary people – workers, women, rural and urban dwellers. We will also look at how these people responded to the changes which took place in their lives.

### ACTIVITY

1. Explain why workers in the early factory system were easily exploited.
2. Look at Source C. What horror of industrialisation does this source reveal. Explain.
3. Which of the four sources conveys best the horrors of the factory system?
4. Form pairs and discuss Source D. Do you agree with this division of time? Should more time be devoted to sleep or to leisure or to work?

### SOURCE D

*The worker's day was divided into three equal phases of 'work', 'leisure' and 'repose' (sleep)*





## Appendix D

### B1

#### ▼ Source A

On 4 July 1776, the Congress of the 13 American states issued the Declaration of Independence. There were three parts to the Declaration, which was written by Thomas Jefferson: a new theory of government, reasons for separation from Britain, and a declaration of independence. The Declaration did more than explain the past, it set the mood for the future.

*We hold these truths to be self-evident: that all men are created equal and that they are endowed by their Creator with certain inalienable rights; that among these are life, liberty and the pursuit of happiness; that to secure these rights, governments are instituted among men, deriving their just powers from the consent of the governed; that, whenever any form of government becomes destructive of these ends, it is the right of the people to alter or to abolish it, and to institute new government, laying its foundation on such principles, and organising its powers in such form as to them shall seem most likely to effect their safety and happiness.*

*We therefore ... declare ... that these United Colonies are and of right ought to be Free and independent States.*

#### **Activity 4 What is independence?** .....

LO1 AS3; LO2 AS1

1. Read the excerpts from the Declaration of Independence in Source A. What do the following mean:
  - all men are created equal
  - inalienable rights
  - governments ... deriving their just powers from the consent of the governed
  - the right of the people to alter or abolish it.
2. Describe the new theory of government put forward by the Declaration.
3. Explain the meaning behind the fall of the statue of George III (see Source B).

#### ▼ Source B



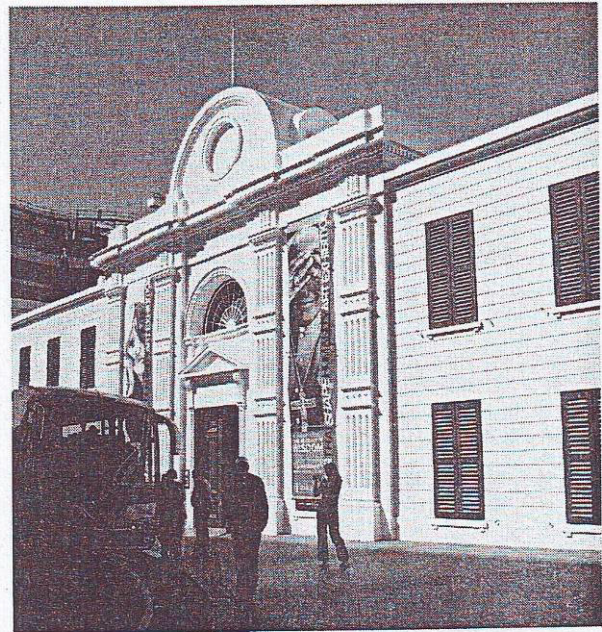
◀ The statue of King George III is toppled, New York, 1776.



▼ **Source A**

*With none of its inhabitants able to see out and with no one able to see in, it could, in a sense, be ignored, even though it was based on Cape Town's busiest thoroughfare, in the centre of town, a shameless fortress of human misery.*

R Shell, *Children of Bondage*



▲ **The Slave Lodge today**

**Activity 7 Thinking about our slave heritage .....**

**LO4 AS1.3**

1. In groups, discuss why you think that our slave heritage has not been well recognised.
2. Discuss ways in which our slave heritage could be made more visible to the public.

**Activity 1 Reading a cartoon .....**

LO2 AS1

With a partner, have a detailed discussion about what you see in the cartoon (Source A).

1. Who does the man represent?
2. Why has he grown so fat?
3. Does this cartoonist think that European countries colonised large parts of the world for economic, political or humanitarian reasons?



◀ *Source A*



**Activity 5.9: Individual**

LO1/AS3; LO3/AS1,3,4

**What impact did the New Poor law have on the lives of the poor?**

Study the table below and answer the questions set.

**Source 5J: Table showing effects of the New Poor Law**

1834	1 260 000 paupers (8% of population)
1850	1 000 000 paupers (5.7% of population)
1833	± 7 million pounds spent on poor relief

- What percentage of the population in Britain, were regarded as paupers (a person who is extremely poor and cannot support himself financially) in 1834?
- What happened to the number of paupers in Britain between 1834 and 1850? (Give answer as a percentage)
- Why do you think the amount spent on poor relief decreased between 1833 and 1837?
- Do you think the poor actually benefitted from this system? Explain your answer in a paragraph of about 5 - 10 lines (50 to 100 words).

**Source 4A:** This extract from *The French Revolution*, explains the concept of Divine Right of Kings.

Divine Right of Kings, ancient doctrine that sovereigns are representatives of God and derive their right to rule directly from God. The concept was first formulated in ancient theocracies such as Egypt under the pharaohs and Shang Dynasty in China. Before the Reformation, the monarch was considered God's representative in all secular matters. Following the Reformation, in some Protestant countries, such as England, the ruler filled this function in religious matters also. According to the doctrine, a ruler's power is not subject to secular limitation; the ruler is responsible only to God. In the 17th century the doctrine was supported by the English Royalists against the Parliamentarians.

**Activity 4.1: Individual**



LO1/AS3; LO2/AS1,3

**What is understood by the concept Divine Right of Kings?**

Refer to Source 4A and answer the following questions:

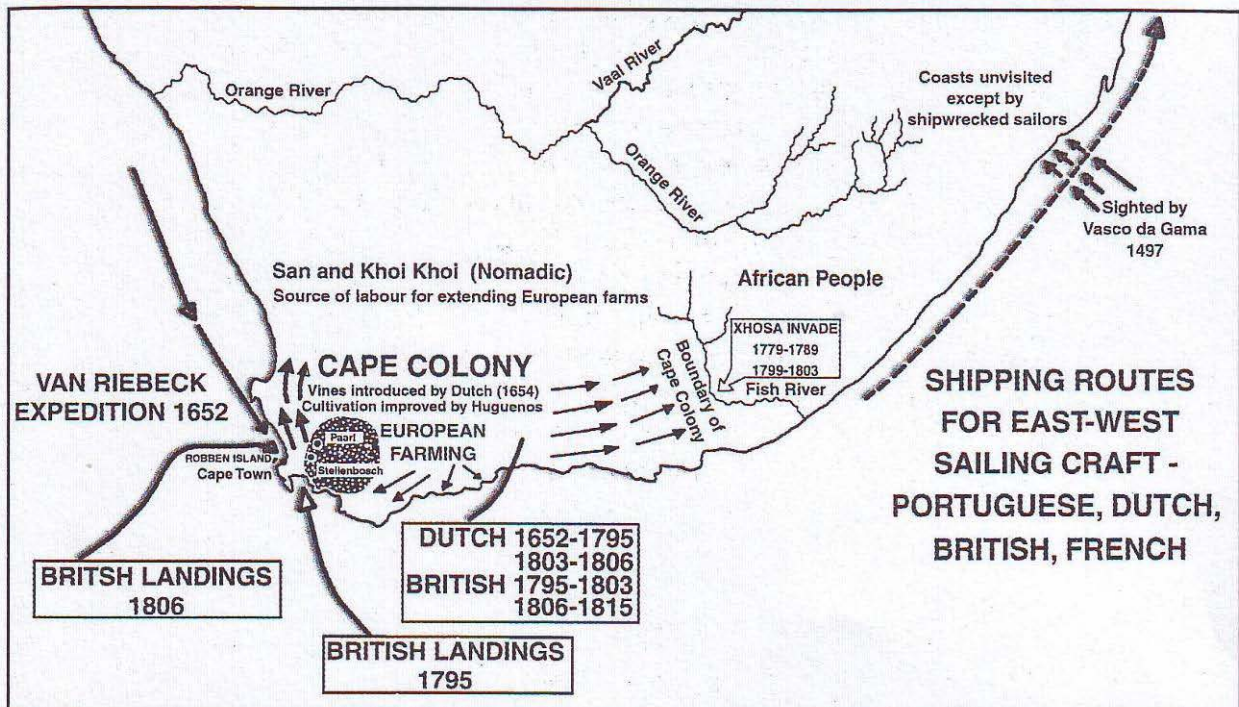
- (a) What do you understand by the concept, Divine Rights of Kings?
- (b) Explain why you think the concept is undemocratic?
- (c) Explain whether the concept of Divine Rights was abused by some rulers?



2. **KEY QUESTION: How did the arrival of the Europeans affect the Khoisan in the Cape?**  
**[LO1/AS3,4; LO2/AS1,2,3; LO3/AS1,2,3]**

Examine the source below and answer the questions that follow.

**SOURCE D: A map showing the dispossession (takeover) of Khoi land in the Cape. Adapted from *The Map Approach to African History*.**



- 2.1 Name the indigenous people that inhabited the Cape before the arrival of the Europeans.
- 2.2 Jan van Riebeeck's arrival marked the beginning of a permanent white settlement. How did this adversely affect the indigenous population?
- 2.3 Explain the concept of land ownership as perceived by the Khoisan and Europeans.
- 2.4 The European penetration into the interior resulted in conflict. Give reasons for this conflict.
- 2.5 Explain how the local people were assimilated into the Cape economy?

**Certificate to prove a professional editor checked my thesis**



22 March 2010

I, Ms Cecilia van der Walt, hereby confirm that I took care of the editing of the Magister dissertation of Ms Brenda Waller titled *The Manifestation of Historical Literacy in Grade 10 History Textbooks*.

**MS CECILIA VAN DER WALT**

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