Unravelling Second-Order Concepts in South African History Textbooks

DOI: http://dx.doi.org/10.17159/2223-0386/2024/n31a2

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DOI: http://dx.doi.org/10.17159/2223-0386/2024/n31a2

Abstract

This paper explores the progression of second-order concepts in seven purposively sampled South African CAPS-compliant history textbooks. History knowledge encompasses both the substantive and procedural knowledge types, with second-order concepts forming an integral component of the latter. Textbook writers and educators use this knowledge in their domains without a predetermined trajectory. These concepts are not mere skills but fundamental notions guiding historical practice. Their meaningful integration into learning materials forms a necessary toolkit for historical inquiry. Drawing from a broader PhD study,[1] a Bernsteinian (1990) framework and the 'big six' concepts articulated by Seixas and Peck (2004) are used to analyse the content of seven chapters, one per book, telling the story of the history of South Africa across grades three to nine in the foundation, intermediate, and senior phases of the South African school curriculum. A continuum was populated, articulating the strengths of the second-order concepts ranging from a powerful presence to those weakly incorporated. The findings indicate a sporadic presence of the six concepts—historical significance, continuity and change, cause and consequence, historical perspectives, and the moral dimension across the textbooks. There is a more inclusive focus in the senior grades and less so in lower grades. The concepts also lack continuous and cumulative development. If these 'structural' historical concepts provide the basis for historical thinking, it is unclear how they advance through the grades with increasing levels of complexity. The methodology of history is thus not a universal or one-

1 Findings extracted from the researcher's broader study, P. Bharath, "An investigation of progression in historical thinking in South African history textbooks" (PhD., UKZN, 2015).

size-fits-all endeavour but an iterative process inculcating concepts that are nuanced and inherently abstract.

Keywords: Content analysis; Textbooks; Procedural knowledge; Substantive knowledge, Second-order concepts; Progression

Introduction

History knowledge is composed of both first-order or substantive (know-that) knowledge and second-order or procedural (know-how) knowledge (Lee 1983). These two strands function in unison, complement each other, and give history its distinctive structure. The substantive dimension makes up the knowledge of the past: people, events, ideas, cultures, societies, and organisations (Fordham 2017, cited in Oppong, Adjepong and Boadu 2022: 144). Counsell (2018a) refers to the curricular definition of substantive knowledge as the content teachers teach as fact. Procedural knowledge refers to the skills and methods historians use to carry out their tasks. These methods involve interpreting evidence, analysing sources, and presenting historical information as narratives. They are the 'ideas that provide our understanding of history as a discipline or form of knowledge' (Lee and Ashby 2000: 199) and characterise history as an active construction of knowledge (Vygotsky 1978 cited in Oppong, Adjepong and Boadu 2022: 145). Procedural knowledge or knowledge-in-use includes concepts like cause and effect, change, continuity, evidence, and historical significance. Historical knowledge's content and process dimensions provide a conceptual frame for this study.

There are always questions on the construction and expansion of historical knowledge. 'Progression' in historical knowledge is not a movement on a linear scale of reasoning from content to process knowledge, but a simultaneous advancement *within each* domain of knowledge (Lévesque 2008). The procedural concepts are not overtly observable in use and are not overt in historians' investigations or the teaching of history at schools (Lévesque 2008). They are also highly nuanced and detailed. The second-order concepts are multi-faceted and complex and may involve subjective interpretations. Therefore, how they progress in any sense may be difficult to articulate precisely. While Bharath (2023) finds a clear progression in substantive knowledge as it shifts from a rudimentary and contextualized nature to a more abstract and dense form, the present study seeks to understand its affiliated structure of knowledge. It does so by investigating how the second-order concepts are assimilated into history knowledge in textbooks. While textbooks present historical information, they do not specify pre-determined proportions of knowledge. In other words, textbooks 'encode' knowledge through various modalities, including textual, image, and map presentations. There is significant justification for analysing their contents to determine the nature of the codes.

Given that both the substantive and procedural knowledge types are encoded in textbooks, there are questions about the balance of each and about the relative significance

of each in garnering a greater grasp of historical knowledge. Perkins (1992) contends that history teaching focussed on substantive content can result in fragile history knowledge and learners' understanding of history can be rigid and limited (cited in Oppong et al. 2022). Bertram (2009: 45) asserts that while curriculum reformers have embraced the procedural dimension of studying history, there is a concern of an overemphasis on procedural knowledge over the substantive. History teaching before the 1970s had a notable emphasis on substantive knowledge and rote learning. The subject was viewed as 'fact' loaded and boring. This traditional, idealised 'objective' model transitioned in the late twentieth century to more innovative 'relativist' approaches in history where fact and 'objectivity' were challenged and attention was given to a skills-based framework. Both England and the United States adopted this notion in their history curricula. Australia, France, and Germany have developed history programmes along similar lines. In Malaysia, these skills are limited to five concepts: historical inquiry, historical information gathering, historical thinking skills (HTS), historical explanation, understanding history and empathy (Talin 2015: 43). The Malaysian education system upgraded the subject of history from an elective in 1989 to a core, compulsory subject to be passed in form five. One of the goals was to equip students with knowledge of the historical events in the country and to instil national pride. There is a growing unification around these ideas in global history.

Following world trends and a changing political landscape, South Africa has also experienced the impact of educational and curriculum changes. The shape and features of the discipline of history have altered in line with policy evolution. Post-apartheid changes brought significant curriculum revision with the removal of racial and biased content. The general aims of the South African curriculum state that 'it promotes knowledge in local contexts while being sensitive to global imperatives' (Department of Education 2011c: 4). It also foregrounds the principle of 'an active and critical approach to learning rather than rote and uncritical learning of given truths' (Department of Education 2011c: 4). Consequently, textbooks were also revised to embrace the transition to a skills-based framework (Beets and le Grange 2008: 69). The historical discipline associated with modes of investigation commenced as early as 1988 when the *'History Alive'* textbook series covering Standard 2 (grade 4) to Standard 10 (grade 12) presented opportunities for interpretation and skills development (Kallaway, 1995: 13). Kallaway (1995) argues that these textbooks were organised in an interrogative manner rather than the conventional direct narrative, presenting an explanatory approach with opportunities for interpretation and translation.

The purpose of this paper is to transcend the polarizing discourse of substantive over

procedural knowledge and focus instead on how current South African textbooks integrate second-order concepts within the content of textbooks, thus embracing the new skills-based approach articulated in the curriculum. Textbooks serve as practical representations of the curriculum, frequently employed in the absence of alternate teaching and learning materials. Considering the impact of these concepts in fostering the scholarly dimensions of historical inquiry, it is important to explore their graded integration within the South African school history curriculum.

Key research questions

My research focuses on two integral questions: 'What are the second-order concepts in history?' and 'How are these concepts incorporated in textbook content of advancing grades?' The research will view existing literature on second-order concepts to understand their role in history knowledge and then use them as a framework to examine how textbooks incorporate them into the content. To understand the present shape of knowledge and more specifically the second-order concepts in South African textbooks, it is necessary to understand the timeline of change as the country transitioned through a series of curriculum shifts after 1990.

Background and contextualisation

General educational changes in South Africa

South Africa's post-apartheid elections led to three national curriculum reforms. The first attempt was to purge the apartheid curriculum (school syllabuses) of 'racially offensive and outdated content' (Jansen 1997). In 1997 an outcomes-based education, called Curriculum 2005 (shortened to C2005), was introduced to overcome the curricular divisions of the past by foregrounding outcomes and allowing teachers to select their content. Implementation was unsuccessful and varied, prompting a curriculum review in 2000. This led to the first curriculum revision: the *Revised National Curriculum Statement Grades R–9* and then the *National Curriculum Statement Grades 10–12* (Department of Education 2002). This curriculum provided more structure and proposed content for teachers.

Ongoing implementation challenges resulted in another review in 2009 and the *National Curriculum Statement Grades 10–12* was revised to produce the CAPS (Curriculum and Assessment Policy Statement) document in 2011. Since 2012, the two

National Curriculum Statements for Grades R–9 and Grades 10–12 respectively have been combined in a single document and are simply known as the *National Curriculum Statement Grades R–12* (NCS). The *National Curriculum Statement Grades R–12* builds on the previous curriculum but also updates it and aims to provide clearer specifications of what is to be learned and taught on a term-by-term basis (Department of Basic Education 2011a:3).

The significance of textbooks in South Africa

The *National Curriculum Statement Grades R–12* represents a policy statement for all approved subjects, including social sciences. The CAPS social science document (Department of Education 2011c: 8) stipulates that 'Every learner should have a quality textbook', and that the textbooks 'should provide accurate content that is aimed at the development of the appropriate skill, concepts and values'. The general aims of the CAPS are stipulated as 'high knowledge and high skills' with the content and context of each grade showing the progression from simple to complex (DoE 2011c: 4).

In South Africa, textbooks serve as purveyors of curriculum-aligned content alongside associated assessments, homework activities, creative projects, and tasks for learners. Adherence to the prescribed standards is reinforced by the Department of Education through its catalogue of textbooks. This comprehensive catalogue lists extensive approved textbooks and publishers from which schools are authorised to make their selections. Either in digital or hard copy format, it becomes imperative to scrutinise textbook contents to determine the nature of the content, its accuracy, and its alignment with international and innovative trends in history methodology.

Concepts in History

According to the social sciences CAPS document (Department of Education 2011c: 11) for the subject of history, the concepts in history are historical sources and evidence; the multi-perspective approach; cause and effect; change and continuity; and time and chronology. The document excludes the moral dimension, even though its significance and inclusion are noted in the network of concepts described by Seixas (2006) and Martin (2012) and deemed mandatory as part of history inquiry. This study investigates how second-order concepts are integrated into textbook portrayals of time, events, individuals, and diverse contexts. By focusing on seven textbooks from grades 3 to 9 across the

foundation, intermediate, and senior phases of the school history curriculum, the research fills a gap that exists in understanding the complexity of these second-order concepts. It seeks to determine if these concepts can be described and if they can, by what constructs. If the concepts advance, how can they be measured? The study then offers a perspective on the status of these concepts in a skills-based curriculum as they are presented in the different textbooks.

Literature Review

The discipline of history

According to Counsell (2011: 202), the most systematic and far-reaching effort in history to 'implement a pedagogy based on the "structure of the discipline" (Schwab 1978) was the 1972 Schools Council History Project (SCHP) (Shemilt 1980)'. She argues that bringing an epistemic tradition to a pedagogic site so pupils can understand the grounds on which valid claims can be made is never easy because a historian's processes cannot be replicated by a learner in a classroom. While the evidence is very important in history, the second-order concepts are those intellectual categories essential to the practice of history that shape the questions historians ask of the past, being the most efficient device for defining the structure of the discipline in curricular terms (Counsell 2011: 206–207). The subject of history is designed to empower learners' thinking. Like science, history uses 'evidence' which links to 'degrees of certainty' ensuring rigor in inquiry. It is worth reflecting, therefore, on the role of such concepts in making everything else in the history curriculum work (Counsell 2011: 217). These concepts have an integrative curricular function that turns content into problems. The concept becomes an inquiry process that challenges learners. Learners will realise that 'all historical knowledge, especially that which ends up in curricula or textbooks, "is always produced by someone and … owned, controlled and subject to change"' (Edwards 2008: 45 cited in Counsell 2011: 218).

Recently, historical thinking has become an explicit outcome in history curricula emanating from a paradigm shift in the 1970s. Historical thinking is the creative process that historians go through to interpret the evidence of the past and generate the stories of history (Seixas 2006). As part of the inquiry, historians seek not to violate the norms of evidence, but to adequately argue the claims of significance and to provide causal explanations amid relevant conditions (Seixas 1993). Moving away from the regurgitating of facts, history is no longer about memorisation but rather the development of heuristic and

epistemological skills (Wineburg 2001). Opportunities should be provided for learners to 'do' history, emphasising the disciplinary nature of history. Additionally, Wineburg (2001) emphasised a document's subtext, using sourcing, corroboration, and contextualisation. As an alternative to historical thinking educationalists used the term 'historical literacy' (Taylor and Young 2003) and 'historical reasoning' (Leinhardt, Beck and Stainton 1994), giving importance to what Lee and Ashby (2000) referred to as second-order concepts. Lee and Ashby (2000: 199) argue that these ideas provide an understanding of history as a discipline or form of knowledge. Thus, historical thinking embraces the notion of 'doing history', co-existing with 'historical understanding', 'historical reasoning', and 'historical literacy' (Parkes and Donelly 2014).

The 'big six' structural benchmarks (Seixas, 2006)

Seixas (2006) developed a model for historical thinking called *Benchmarks of historical thinking: A framework for assessment in Canada*. He unpacks progression in 'historical thinking' with six structural benchmarks which are: to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take historical perspectives, and understand the moral dimension of historical interpretations. A review of literature by Nye, Hughes-Warrington, Roe, Russel, Peel, Deacon, Laugeson, Kiem (2009) on the concept of historical thinking produced insights from Wineburg's (2009) discussion on engagement with sources, Seixas' (2006) description of engagement and practice of historical study, Ashby and Lee's (2001) work on empathy, and Levstick's view (2001) that historical thinking is a social act rather than an individual one. They concluded that evidence-based inquiry is crucial for the development of historical thinking. Where sources are found, interpreted, critiqued, and contextualised and where in turn the students' empathy is developed, they learn to engage in a disciplinary conversation.

In a study by Nye et al. (2009) sixty-five percent of participating students referenced historical thinking as a process, sometimes agentic and sometimes routine and mechanical. They used terms such as analyse, evaluate, investigate, re-enact, compare and contrast, and reflect. They also used points of reference such as subjectivity, context, bias, structure, memory, and empathy. It is argued that historical thinking represents the second-order concepts that advance as a learner moves into higher grades (Bharath 2015:12). According to Seixas and Peck (2004: 109) school history should provide learners with the ability to approach historical narratives critically. Questions should be about who constructed the

account and why, what sources they use, what other accounts are there of the same event or lives, how and why they differ, and which we should believe. The purpose of history education is to work with these fragments of thinking and develop them so that learners can have a better understanding.

If these complex but mandatory ways in which learners process information in history, how would the level of engagement at grade 3 level differ from the same process at the grade 9 level? Ken Osborne notes that '… it is not clear whether or to what extent history courses at different grade levels are designed to build on each other in any cumulative way' (cited in Seixas, 2006:1). Osbourne has shown that there are debates about historical thinking and its progression in the history curriculum. The Benchmarks project, with six distinct but closely interrelated historical thinking concepts, ties 'historical thinking' to competencies in 'historical literacy'. Lee and Ashby (2000), Lévesque (2008), Seixas (2006), and Shemilt (1980) were useful in providing the key descriptions of historical concepts. The elements of historical thinking have critical questions and descriptions that historians engage with (Seixas and Peck, 2004: 111).

The questions and descriptions (presented below) will be used as a framework to analyse the content of each textbook to assess how the second-order concept manifests.

The elements of historical thinking and essential questions

1. **Historical significance: Historians establish historical significance** by asking the following question: How do we decide what is important to learn about the past?

Everything in the past cannot be taught nor can a historian write every detail. What is designated for study is what researchers have recognised as historically significant and not trivial. Those events have had the greatest impact on people and environments (World War 1; The French Revolution; the great political, economic, and military leaders; women's history; labour history). 'Knowing a lot of historical facts is useless without knowing how they fit together" (Seixas and Peck 2004: 111). It develops with systematic teaching and this is where the role of teachers and their training is important.

2. **Epistemology and evidence** (Seixas and Peck 2004: 111). **Historians use primary source evidence** to answer the question: How do we know what we know about the past?

We rely selectively on the knowledge of experts, which is why the curriculum is represented in textbooks, written by experts or historians, understanding how to express the significant facts in the desired methodology of history.

3. **Continuity and change** (Seixas and Peck 2004: 112). **Historians examine change and continuity to** answer the question: How do we make sense of the complex flows of history?

The historian will set out to explain why events happen and what their impacts are. Understanding change over time is central to historical thinking. This is influenced by age and location. What a person believes to be true and real is influenced by their own beliefs and their individual perception of the environment and events. People have different backgrounds and experiences which affect how nuanced their ideas of what has changed.

4. **Progress and decline** (Seixas and Peck 2004: 113) **Historians analyse what has progressed and continue** to answer the question: Why do events happen and what are their impacts?

Here there is an evaluative element to the issue of continuity and change. Have things changed, has it improved? Or has it gotten worse? It depends. Progress can relate to technological, economic (in terms of standards of living), political (in terms of democratic participation and representation), moral (in terms of protection of human rights), environmental, scientific, spiritual aspects, and more.

Most history textbooks (as well as the work of academic historians, until very recently) assume an underlying framework of historical progress (Seixas and Peck 2004: 112). In South Africa, we may categorise this in terms of its political progress before apartheid and after its demise. The curriculum process and evolution itself are the agents of change. It is a complex moment in historical time as people argue about what has changed, if it has changed, whether there is progress, and to whom that progress applies. The orientation to historical knowledge is complex and what do we do with our progress-based history textbooks?

5. **Empathy** (historical perspective-taking) **and moral judgement** (Seixas and Peck 2004: 113). Given a set of circumstances, why did people act in a certain way? Contextualise the lived experience of a historical figure and comment as an observer of the past.
6. **Historians take historical perspectives. Historians attempt to understand the ethical dimension** of history to answer the question: How do we better understand the people of the past?

Both concepts 5 and 6 are used to consider people in the past who experienced the world through different belief systems. People who experienced apartheid are different from the 'born-frees' who have not experienced the world and country like their fathers and grandfathers. The error of 'presentism' is a failure to realise how much they do not know

about the past. Empathy or taking a historical perspective is an effective process.

The 'big six' concepts, comprising historical thinking, are to be viewed as 'competencies' or second-order skills integrated into all aspects of teaching from formulating objectives, to selection of resources and teaching strategies, to assessment of learners' performance (Seixas and Morton 2013). These concepts provide us with a vocabulary framework to use. An academic historian undergoes specialised training to assemble history using these concepts and writes what constitutes a valid historical argument in history textbooks and other materials. This is typically what inquiry is about. Inquiry engages students in thought-provoking questions that prompt an active engagement with the past. The application of second-order concepts guides this process. Inquiry thus demands more than memorising pieces of information but rather working with evidence, weighing choices, and making interpretations.

Researchers have highlighted 'progression models' to explain the incremental growth of the second-order concepts. Lee and Shemilt (2003) argue that conceptual crudity in the form of generic and imprecise language, like 'simple', 'begin to', and 'show some independence', be avoided as a substitute for identification of important shifts in understanding. They also assert that evidence points to the fact that students' ideas are 'decoupled', that, for example, a student's ideas about 'evidence' can remain the same. In contrast, his ideas about 'accounts' change quite rapidly. They also caution about quantifying the gaps between categories and assuming that the gaps in one concept are equivalent to those in another. However, they argue that these models are hierarchical, as students work from less to more powerful ideas. The levels in the progression models, however, are not a sequence of ladder-like steps that every student must climb. The models can be said to be both hierarchical and, at the same time, not a ladder-like sequence. This apparent contradiction can be explained by the movement of ideas within each key concept at various degrees. It is almost certain that each key concept advances as learners' ideas about each one gain a stronger understanding as they mature. However, it is not guaranteed that they advance in the same amounts or degrees at the same time in the curriculum. This means that while the growth in ideas is expected, it is not a calculated, measurable quantification at any particular stage. It is, for this reason, that Lee and Shemilt (2003) recommend different models of progression for each key concept, so that the movement of students' ideas from less powerful to more powerful within each key concept, like 'evidence' and 'change', is represented separately.

The second-order concepts in such models possibly set out ideas that groups of children of certain ages can exhibit, showing patterns of development. A progression model can also

help predict the range of ideas that are likely to be encountered at a certain developmental stage. Research has shown that in history (as in science), there is a seven-year gap. For example, the ideas seven-year-olds have about 'cause' may be the same for most fourteen-year-olds, and some fourteen-year-olds will be working with the same ideas that seven-year-olds employ (Lee and Shemilt 2003). The models are based on prediction, showing us how most students of a given age are likely to think. They do not tell us what students must necessarily *do*. A model's shelf-life or its reconfiguration over time is not guaranteed. It is not comprehensive and difficult to measure powerful ideas.

While research about progression outside the United Kingdom (UK) is still scarce, it looks as if the models developed in the UK can successfully predict the range of ideas with which students operate, even if the age distribution in other cultures is different (Lee and Shemilt 2003). These models are not rigid, all-embracing models of progression, but they have built up empirical data over the years and offer ways to analyse pupil progression (Lee and Shemilt 2004). Lee and Shemilt (2004) present a research-based progression model that suggests that students' preconceptions about history, or what they initially understand, are important to how and what they will learn. Lee and Shemilt (2009: 43) later offer a six-levelled model of second-order concepts that deal with students' conceptual understandings. They argue that conceptual apparatus must be mastered at common sense or first level before a student can write explanatory narratives.

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

Blow (2011) contends that children's mastery of these second-order concepts is fundamental to their meaning-making of stories in history. Understanding these concepts helps them make sense of the past and its relationship to the present. Later work by Blow, Lee and Shemilt (2012) advanced that students experience difficulty not only in chronological

conventions but that conceptual mastery was also problematic. They argue that learning to think historically involves learning to think about concepts like time, duration, sequence, and concurrence as well as the relationships between them. This would allow learners to gain an understanding of both historical and present contexts.

A considerable body of constructivist research conducted in the UK led to the Historica Foundation and the Centre for the Study of Historical Consciousness in Canada which are collaborating with educators to help teach and assess historical thinking. Lévesque (2008: 7) cites Veronica Boix-Mansilla and Howard Gardner's definition, that 'Disciplinary thinking constitutes the most advanced way of approaching and investigating issues within various domains of knowledge'. Lévesque (2008) contends that disciplines such as history have their own modes of inquiry, networks of concepts and principles, theoretical frameworks, symbolic systems, and vocabularies, offering formidable 'ways of knowing' about the past or current issues of significance. Lévesque (2008) argues that while children seem to easily acquire theories and explanatory frameworks supplied by memory history, disciplinary thinking proves to be more challenging. People need to acquire established knowledge within their disciplines (e.g., facts and accounts), but this must be acquired through disciplinary method procedures. Cognitive psychologist Sam Wineburg (2001) asserts that achieving mature historical thinking is 'far from a natural act'. Dewey (cited in Lévesque, 2008: 27) summed it up by concluding that 'the value of knowledge is subordinate to its use in thinking'.

Ford (2014: 1) suggests a model of progression in the United Kingdom that moves away from a linear way of thinking about it and uses an approach of nonlinear conceptual mastery, again focusing on the second-order concepts of causation, continuity, and change, taking a historical perspective, cause and consequence, and developing a moral outlook. Learners gain powerful ideas which are in no precise order. Lévesque (2008) argues that the lack of clarity regarding the sequence of gaining mastery over these concepts presents a problem in history education. History educators may fail to understand where to begin with historical thinking. They may introduce learners to disciplinary concepts and procedures, thereby creating the possibility for progression in historical thinking, but it is not known at which point in the history curriculum these second-order concepts should be introduced and taught. Booth (1992) argued that *deductive and inductive* reasoning was used by scientists to develop theories and laws to explain the world, whereas historians differed, as they reached understandings through *abductive reasoning* by asking questions of the past and arriving at reasoned explanations after consulting with different facts and views. Booth's research laid the foundations for discipline-based curriculum development

and teaching, emphasising the special nature of historical thinking and reasoning, and offering sound empirical evidence on how adolescents learn to reason historically.

Theoretical framework

I adhere to the critical, realist, ontological perspective which views a phenomenon through the lens of subjective perceptions. Thus, our perspectives and experiences with structures present in a social world result in a possible explanation of that which is 'observable'. This stance rejects positivism and 'objectivity' and recognises that an interpretation is never free of presuppositions and is subject to revision (Neumann 2010: 491).

The overarching theoretical frame of this study is provided by Bernstein's field of recontextualization and rules, which describes the regulation of selection, sequence, pacing, and evaluation of knowledge within the textbooks (Bernstein 1990: 185). The field is the content of the textbook and the writers or designers of the texts are the key recontextualising agents making choices about how historical knowledge is presented. Bernstein (1975) defines the curriculum as the valid knowledge to be acquired, pedagogy as the vehicle for its transmission, and evaluation as the learner's realisation of this knowledge.

Bernstein's pedagogic device (1990: 200) constitutes the message relay or principles by which knowledge (everyday, professional, disciplinary) is 'recontextualised' into educational knowledge. Knowledge production, recontextualization, and reproduction are the three fields that make up this pedagogic device. Bernstein (1990) adds that these fields are operated by a set of rules governing what knowledge becomes privileged and what affects this knowledge, how it gets recontextualized into the curriculum, and finally, how pedagogy and assessment are transmitted. When textbook writers present history knowledge (site of production), the content is codified in textbooks, and the knowledge is recontextualized when learners use it or when it is conveyed by the teacher.

Conceptual framework

Procedural knowledge is not explicitly articulated but it rather manifests functionally within the textual framework. To understand how textbooks encode second-order concepts in their content, the study uses an analytic framework rooted in Seixas and Peck's (2004) delineation of conceptual elements. The intent is to systematically analyse the content of the textbooks to understand the integration of second-order concepts. The understanding

of these concepts is presented in the literature describing what the types of knowledge are and how each of them plays an integral role in historical knowledge.

Methodology

The study is located within the interpretive paradigm, utilising the methodology of content analysis. Cohen, Manion and Morrison (2007: 197) define content analysis as a 'multi-purpose research method developed specifically for investigating a broad spectrum of problems in which the content of communication serves as a basis of inference, from counts to categorization'. The 'big six' structural benchmarks (Seixas and Peck, 2004:111) are used as an analytic framework over the content of seven textbooks. The purpose is to locate second-order concepts on a graded continuum from their robust presence to that which may be subtle or weak. In the pursuit of methodological rigor, I devised a three-step tool, carefully described below so the research methodology can be emulated:

- *Step One:* A deep reading of each chapter is captured in a journal describing key observations and inferences of all content. The essential question for each concept (Seixas and Peck 2004: 111) is applied and results are recorded.
- *Step Two:* The strengths of the judgments are coded and tabularised as strong, weak, or absent (for each book and chapter separately). Reasons are added for why the judgments were made. I use examples from the textbooks to explain the coding.
- *Step Three:* Finally, the data from all the textbooks (gleaned from Steps One and Two), are integrated and summarised into a single consolidated table showing the results of seven textbooks.

These steps allow me to get a sense of how each textbook configures the second-order concepts across the grades. The qualitative analysis would produce nuanced descriptions of patterns and trends showing overall engagement with the broader second-order concepts. The tabularised results signal the patterns of the second-order concepts of history and allow for interpretations.

To demonstrate how coding took place for each of the textbooks, the grade 3 textbook results are presented below in Table 1.

Table 1: Procedural or Second-Order Concept Prompts for Grade 3

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

The sample

Seven CAPS-compliant textbooks covering three different phases (Foundation, Intermediate, and Senior) in the school history curriculum were purposively sampled from provincial Department of Education catalogues for Learner and Teacher Support Material. To illustrate the advancing grade continuum, Grades 3 to Grade 9 were purposively selected. The Grade 3 textbook is from the learning area called life skills, as there is no social science or history subject in the Foundation Phase. However, the key introductory ideas to history are represented in the curriculum for Grade 3 in their life skills textbooks. The Grades 4–7 textbooks were easily available, popular choices in various schools, and bought in bulk for use at the researcher's school. The remaining two textbooks for Grades 8–9 were chosen from the local and distant secondary schools where they are considered popular choices. Although publishers present both the learner's book and the teacher's guide, the analysis here concerns only the learner's book.

The fundamental idea was to capture how the knowledge and skills are directed and leveled at its basic entry point in foundational history and how it develops in the senior grades. Table 2 below shows how the seven chapters also purposively selected for analysis unfolded in the story 'About Me' and 'The History of South Africa from its early inhabitants to Democracy'. The table also indicates how the textbooks are named in the study. I refer to chapters as Grade 3, Grade 4, Grade 5, Grade 6, Grade 7, Grade 8, and Grade 9. The references for each textbook are provided in the reference section.

Table 2: Topics chosen per grade of textbook

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

Ethical considerations

The textbooks are freely available in the public domain and there are minimal ethical considerations if specific content is not criticised or used in an unfair or biased manner. The intention is not to harm the image of any publisher or writer but to bring light to the theoretical shape of history knowledge and how textbooks embrace it, specific to the sample selected for analysis. The selection of the seven texts, each one from a grade from Grades 3–9, as well as the selection of a chapter per text, constitute acts of aggregation which Weber (1990), in Cohen et al (2007), identifies as a compromise in reliability. While whole text analyses are desirable, they are time-consuming, as copious amounts of data are coded and generated. This study already engages three phases in the school curriculum, and any additional chapters would have lengthened the study and made the kind of analysis engaged with here rather complex.

The only way the choice of instruments used here can be compromised is if the classification of the text is inconsistent, either because of human error, coder variability (within coders and between coders), or ambiguity in coding rules. Words are innately ambiguous and the danger of different coders 'reading' different meanings into them can arise. The researcher's 'language of description' is made explicit in each step of analysis assisting in guarding against potential misreading. Researcher coding and placement have to be meticulous and scrupulous and the data have to be checked so that errors do not arise. A second coder in the data collection process could have enhanced inter-rater reliability.

Findings

The findings confirm a sporadic presence of all six concepts—historical significance, continuity and change, cause and consequence, historical perspectives, primary source evidence and the moral dimension across the seven textbooks. However, they are incorporated in a nonlinear manner, lacking continuous and cumulative development. This is consistent with ASCL's (2015: 4) contention that progress is neither linear nor easily explicable. It is not a process of mastering steps to success in history as learners may achieve some quite complex conceptual thought but still lack basic tenets of historical understanding, for example, chronology. There is a very specific nonlinear progression in the introduction and engagement of various concepts at different points in the graded continuum. It is also certain that they operate at different degrees throughout the texts. One cannot attain precision in the degrees at which they operate because they are represented in the depths of language which is essentially an abstract phenomenon.

Table 3 below summarises how all the textbooks in the sample dealt with procedural concepts.

Table 3: Procedural concept prompts across all seven textbooks

	Evidence in Text						
Procedural Concepts	**Gr 3**	**Gr 4**	**Gr 5**	**Gr 6**	**Gr 7**	**Gr 8**	**Gr 9**
1. Establish historical significance	✓	✓	✓	✓	✓	✓	✓
2. Use primary source evidence	✓	✓	✓	✓	✓	✓	✓
3. Identify continuity and change	✓	✓	✓	✓	✓	✓	✓
4. Analyse the cause and consequence	✓			✓	✓	✓	✓
5. Take historical perspectives					✓	✓	✓
6. Understand moral dimensions					✓	✓	✓

Establish historical significance

At the Grade 3 level, there is an immediate introduction to historical significance and appreciation for objects from the past and an inherent motivation for the preservation of objects in Grade 4 and Grade 5. There is strong evidence of historical significance in the Grade 3 chapter 'About Me' as it focuses on a learner's personal history, fostering the idea

of a timeline of experiences in childhood. In Grade 4, there is no specific event under study. Instead, learners are required to understand their local environment, with the concept of historical significance weakly coded. By Grade 5, there is strong evidence of historical significance as learners study rock paintings and other historical artifacts to understand the past. In Grade 6 where the curriculum covers various events leading to the development of African societies, historical significance is strongly present. It is also observed in Grade 7 where the arrival of settlers in South Africa and their impact on indigenous people is strongly coded. The social, economic, and political significance of the Mineral Revolution was a strongly coded topic in Grade 8. Finally, in Grade 9, several significant events like the Sharpeville massacre, the liberation struggle, and the release of Nelson Mandela provide strong evidence of the second-order concept of historical significance. In higher grades, there are specific questions that raise awareness of what is significant about the events. While there appears to be a staggered start to the implementation of the second-order concepts, there is an ongoing development and growth of these concepts in the higher-graded textbooks.

Use primary source evidence

There are weak instances of primary source analysis in Grade 3 as the history is centered around a learner's personal and family history. It helps in fostering the understanding of chronology through personal experiences. In Grade 4, there is strong evidence of primary sources which requires learners to locate objects in their local environment to construct stories. By Grade 5, there is robust evidence of how primary sources like the paintings and other artifacts of the San can be used to construct their history. In Grade 6, there is a strong presence of both generic and primary sources which allow for the construction of historical narratives. Grade 7 history also features a strong presence of generic and primary source material focusing on slavery and 17th-century history. However, the sources are not properly contextualized which obscures a clear understanding of the context and creation of the sources. In Grade 8, there is strong evidence of primary sources, reinforced in Grade 9 where numerous primary sources incorporate photos, eyewitness accounts, maps, and posters which foster debate and critical analysis.

Identify continuity and change

Grade 3 shows strong evidence of growth and changes in the learner's life albeit in his

personal history. This benchmark was indicated even though it is in a smaller space and context. Learners are nevertheless acquiring knowledge about what constitutes change and what remains the same. In Grade 4 there is also strong evidence of this second-order concept as learners tabulate changes in their school, transport over time, and the games that were played. In Grade 5, there is sufficient detail to show how hunter-gatherers lived and how their stories can be constructed from the archaeological excavations. This trend continues in Grade 6 where various maps and other primary sources show how Mapungubwe functioned, from early societies to trade across the Indian Ocean. The strong presence is sustained in Grade 7 with images of the early and later developed Cape scaffolding the development of change. Grade 8 also shows up strongly with many maps and other sources building ideas of development and expansionism. Grade 9 was strongly coded as there were large time events about the liberation struggle under study, demonstrating the idea of change.

Analyse cause and consequence

From the timeline and the information that is presented in Grade 3 history, there is strong evidence of how changes can bring about consequences in the short period of a learner's life: a new home, a crèche, how a fall broke his arm, his birthday, and his place of birth. This understanding is very much on a simpler understanding to scaffold the idea of cause and consequence for the learner in the foundation phase. It is the entry point where simple definitions and understandings are built. In Grades 4 and 5, there was no evidence of an event to code. In Grade 6 there is a strong indication of cause-and-consequence as many historical events are presented over different periods. Grade 7 shows strong evidence of coding as the content engages with the original inhabitants of the Cape and their interaction with settlers over land ownership, disputes, and migration. Likewise in Grade 8, several events covered in the history of the Mineral Revolution involved other inter-related events and experiences. Multiple causes and consequences in this grade are strongly coded. In Grade 9 learners engage with specific headings like 'short-term consequences' and 'longer-term consequences' which make a strong instance for affirmative coding.

Take a historical perspective

The Grade 3 learners are not required to take any particular perspective but rather engage with information in simple ways. In Grade 4 there is strong evidence of taking perspectives

as learners are tasked with understanding why Enoch Santonga is remembered in the construction of the National Anthem. Grade 5 and 6 learners are not required to take any perspective while the Grade 7 text shows strong coding as learners deal effects of the arrival of settlers in South Africa. In Grade 8, this second-order concept is strongly coded as learners are required to formulate their perspectives about mining companies, labour, and the living conditions of the miners. There are also more events under study and more information to consider. Grade 9 had the strongest coding as learners are frequently required to offer a perspective on the Sharpeville massacre and other events. A lot of previous history knowledge is required at this level to formulate a refined perspective.

Understand the moral dimension of historical interpretation

In Grade 3, 4, 5, and 6 textbook chapters, there is no indication of activities that require moral insight. This is probably because the age and stage of the learner do not require this higher level or second-order skill. It is also not a criterion in the CAPS depiction of second-order concepts. However, in Grade 7 there is a strong development of moral insights as learners reflect on Van Riebeeck's journal entry. In the journal, Van Riebeeck is recorded telling Khoi-Khoi leaders that they had lost their land in a war and could not get it back. Learners are questioned about the morality of this issue. Likewise in Grade 8, learners are drawn into a discussion on the lives of miners who left their families to live in a compound. The answers cannot be approached anachronistically but require learners to be thoroughly engaged with the lives of the people to comment. The Grade 9 text is also strongly coded because learners are drawn into almost every activity, to offer moral insights. In one instance, they are invited to comment on whether the ANC was justified in forming the military wing Umkhonto we Sizwe (MK) changing their former peaceful stance.

Discussion

This paper offers a tentative view of the nature of second-order concepts in history textbooks. It theorizes the role and integration of second-order concepts, arguing that they do not progress cumulatively through the ascending grades. There is a lack of clarity on the sequence and depth of each concept and on how mastery over them can occur. Textbooks may present history content chronologically but do not rank events by their order of significance. It is argued that second-order concepts blunt the epistemic import, confusing those history teachers who struggle to understand the role of concepts in

planning (Counsell 2011: 219). History educators may fail to understand where to begin and how to include them. Winch (2013) purports that 'a curriculum must enact processes of "epistemic ascent" by which concepts already understood by students are brought into new relations of abstraction and generality, giving the student yet more power to challenge, rethink, and create. The challenge for textbook authors, publishers, and teachers is to recognise theories replete with descriptions but to note their journey in the content and to fill in the gaps where the narrative runs sporadically. Counsell (2018b: 1) argues that a good narrative may have many events but its meaning-making structure is not episodic but continuous, keeping the multiple strands all spinning at once.

The findings of this study also show limited incorporation of the moral dimension within the lower grades of the sampled textbooks. Despite its global recognition and inclusion in diverse historical study models, its exclusion from the South African curriculum documents is conspicuous. The focus of history is to enhance learners' understanding of the people of the past and past events, fostering an awareness of historical contexts different from their own. Moral implications are inherent in historical narratives and therefore an early engagement with this dimension is pivotal. Early and sustained exposure to ethical considerations in historical studies leads to the cultivation of moral agency among learners. Given that South Africa's historical past is marked by apartheid and conflict, an earlier understanding of historical rivalry, resolution, and reconciliation is deemed essential for learners.

Challenges and recommendations

The progressive advancement of second-order skills is a necessary criterion for historical thinking. If textbooks do not consistently present second-order concepts, learners may not have sufficient opportunities to develop critical thinking skills. A surface-level understanding of history could hinder deep engagement and critical analysis. Varying and lesser predominance of certain concepts may indicate misalignment with curriculum goals. Learners using certain textbooks may not receive the same educational opportunities afforded by other books which encourage more nuanced views of history. This challenge may require educators to bridge the gap and seek out alternate textbooks. There is a need for a regular and comprehensive review of textbooks to ensure that they prioritise necessary tools for historical analysis and interpretation. Improved textbook content as well as the professional development of educators can promote a rigorous and inclusive approach in fostering critical thinking.

Conclusion

There is a need for research on skills in history to establish how the critical and analytic thought processes in learners at different grade levels are being developed. A basic repertoire of historical skills must be developed in the early stages so that deeper associations at a higher level can then be obtained. Learning resources, inclusive of in-depth activities in textbooks, represent scaffolding for learners to progress to the complex levels. If learning is to occur in a linear process, where knowledge is built up piece by piece, with each piece offering a meaning, then it is not that clear with the second-order concepts. The sporadic presence and lack of cumulative progression in the second-order concepts reveal a need for a more coherent approach to teaching. For South African textbooks, it means a reassessment of how the fundamental concepts are embedded in content knowledge and how improvements can foster historical inquiry, better preparing learners for historical thinking.

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