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**CURRICULUM DESIGN IN NEW ZEALAND SOCIAL STUDIES:
LEARNING FROM THE PAST**

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A thesis submitted in partial fulfillment of the requirements
For the degree of Doctor of Education,
The University of Auckland, 2005

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ABSTRACT

This thesis is sourced in a practical problem of curriculum design. As part of the current Ministry of Education *Curriculum Project*, the outcomes of New Zealand social studies are being “clarified and refined” through the development of an “essence statement” and revised curriculum structure. Given the fraught history of the social studies curriculum this work is of particular significance because it challenges those who remain committed to the subject to define and defend its relative importance in the national curriculum. Effective curriculum design, it is argued, can enhance the understanding, credibility and acceptance of the subject by expressing a clear and theoretically coherent view of its purpose and content. As such, it is both a resource for teacher learning about the subject and its requirements and a policy statement of student entitlement. It matters, therefore, what sense is made of it.

This thesis examines and develops recommendations for enhancing the design of the New Zealand social studies curriculum through a three-stage process. First, the sense-making qualities of design are examined with reference to empirical work on curriculum policy implementation by Spillane and his colleagues (2000, 2002, 2004), and with reference to the role of language in cognition and to cognitive load theory. This analysis revealed that the interactions between design, individual cognition and situated cognition are critical to sense-making about policy. A set of design criteria was generated from this analysis that emphasized the need for design to take close account of the existing schema of implementing agents and of the constraints of working memory.

In the second phase of analysis, the design criteria were applied to the text of the four official expressions of New Zealand social studies curriculum policy since 1942. Using documentary analysis a set of design patterns was identified. The patterns revealed that the main sense-making challenges for New Zealand social studies curricula have been the difficulty in signalling shifts in purpose and content, the lack of a theoretical

structure that maximises internal coherence and alignment, and the complexities associated with the desire to maximise teacher autonomy. As a result of this analysis, the original design criteria were refined and presented as a set of design propositions to guide future curriculum development in social studies.

The third stage of analysis develops and justifies a curriculum framework for social studies based on citizenship education. Citizenship education is defined, its importance within social studies is justified, and its inherent tensions are acknowledged. The suggested curriculum framework, which is aligned with the design propositions, is developed from theoretical work in the field of citizenship education and from international examples of citizenship education curriculum design.

The thesis concludes that social studies curriculum design needs to pay much greater attention to the cognitive processes of implementing agents and to the need for an internally coherent structure based on a defensible and theoretically-derived curriculum purpose.

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INTRODUCTION

Curriculum research is informed by multiple and complex discourses. In rejecting the search for a grand narrative of curriculum that distils these discourses into a single ideological approach, Pinar, Reynolds, Slattery and Taubman (1995) argue that curriculum needs to be understood as “intensely historical, political, racial, gendered, phenomenological, autobiographical, aesthetic, theological and international” (p. 847). Given the contents of their book they might also have added that it also needs to be understood as poststructuralist and postmodern text. They depict the field as thriving, “recently reconceptualised, animated, filled with a thousand voices” (p. 863) but, at the same time as “young and unstable” (p. 868) and, therefore, amenable to further novel influences. In his review of the field, Wright (2000) interprets the multiple voices somewhat more conservatively as contributing to a field that is “expansive and nebulous” (p. 4) but nonetheless, in concluding his review, identifies trends that have a strong resemblance to those identified by Pinar and his colleagues:

Curriculum theorising has been overtly politicized: It has been variously institutionalized, freed of institutional constraints, restricted to ... schooling and opened up to other pedagogical spaces, queered, raced, gendered, aestheticized, psychoanalysed, moralized, modernized and postmodernized, all to such an extent that it presently demands a high degree of flexibility and tolerance from all involved. (p. 10)

In a review of the curriculum field in New Zealand Roberts (2003) identifies a slightly different mix of preoccupations. Primary among these is the impact of neo-liberal policy reforms since 1984 on education in general and curriculum in particular. Much of this writing has been directed towards an analysis of the New Zealand curriculum framework and its constituent subject documents. It has critiqued the nature of teacher involvement, the nature of knowledge as represented in the curriculum, the emphasis on economic aspirations and entrepreneurship, and the role of lobby groups in the development of curriculum. This work has been extended recently by O’Neill, Clark and Openshaw (2004) with their edited work drawing attention to the “historical, sociological, philosophical, and policy-oriented” (p. 17) study of curriculum and its importance for teachers.

What these reviews illustrate is that curriculum theorizing – the search for patterns, issues and their meanings and implications (Marsh & Willis, 2003) - is informed by diverse perspectives. The perspectives that contribute to the curriculum theorising in this thesis are both cognitive and historical. Drawing initially on the work of Spillane (2000, 2004) it develops the argument that curriculum poses a significant cognitive challenge for those who design it, and those who implement it. It positions curriculum policy as a significant educative resource for teachers that can, through its design, enhance or inhibit teacher agency and autonomy (Davis & Krajcik, 2005). It is educative, not in a narrow instructional sense, but in the sense that it “should help to increase teacher knowledge in specific instances of instructional decision-making but also help them develop more general knowledge that they can apply flexibly in new situations” (p. 3). In other words, in the same way that effective teaching promotes student learning that is useful and transferable, effective design promotes teacher learning that is likewise. Drawing on aspects of theory and research about the way the human cognitive system works and the situations in which that system operates this thesis seeks to develop a tentative explanation of how design affects teacher learning (Mayer, 1993).

Curriculum policy is also educative in the sense that it communicates in its individual subject statements, and within the constraints of what the State is prepared to endorse, a representation of the content and purpose of each subject field. As a statement of intention and entitlement it matters, therefore, what sense teachers make of it. This is especially the case in a less mature subject such as social studies whose purposes may be poorly understood and whose status attracts a lower priority from teachers faced with the competing demands of other subjects they prefer to teach or that their school regards as more important. As Hayward, Priestly and Young (2004) have argued, external agencies have limited control over contextual factors that influence the understanding and acceptance of reform. They have to boost the strength, therefore, of the factors that are in their control.

The thesis seeks to understand the design qualities of national curriculum policy that enhance sense-making for implementing agents (primarily teachers) by examining, through a cognitive lens, four early expressions of national social studies curriculum policy. The approach adopted here to curriculum theorising, therefore, is one that searches for patterns and issues in historical data, attempts to determine their cognitive significance and uses insights from this analysis to suggest a way forward for New Zealand social studies curriculum design.

With its focus on the intersections between curriculum history, cognition and design the thesis brings a very different perspective from those discussed by Pinar et al. (1995). Those authors and Wright (2000) are notably silent on cognition and, in one instance, claim that “the era of curriculum development is past” (Pinar, et al., 1995, p. 5) and that “curriculum ... design, implementation and evaluation are no longer the major concepts of the day” (p. 6). Be that as it may, they remain preoccupations of a New Zealand school system that has recently embarked on a review of its national curriculum. This thesis, by addressing immediate and enduring problems in New Zealand social studies, aims to ground its theorising in what Sears (1992) has called “the art of the practical” (p. 216). Its cognitive contribution does not diminish the value of the complementary analyses of curriculum – it simply prioritises the historical and cognitive with a view to influencing the current process of curriculum development and design in a way that strengthens the position of social studies as a compulsory subject in the New Zealand curriculum. As Roberts (2003) argued in the conclusion to his New Zealand review, while ongoing critical work remains to be done in New Zealand curriculum studies, the preoccupations about curriculum aims and purposes that are central to this thesis are also significant in “building and sustaining a rigorous, comprehensive programme of teaching and research in curriculum studies in New Zealand” (p. 511).

This overview begins with a brief outline of the process of curriculum development in New Zealand since 1993 and the motivations for the current curriculum review. It then turns to a summary of the issues that social studies faces as a compulsory subject in the New Zealand curriculum. This leads to the discussion of the thesis aims and definitions and to an explanation of the relationship of this work to earlier research in the field. The overview concludes with a brief summary of the thesis argument.

The Context of the Study

The context for this study originates in the curriculum developments of the 1990's and their subsequent and recent review.

The Curriculum Developments of the 1990's

The release by the Ministry of Education (1993) of the *New Zealand Curriculum Framework* signalled two significant reforms in national curriculum development and design. Firstly, although New Zealand had a national curriculum prior to 1993 in the sense that all state schools were required to follow a common curriculum, each curriculum statement was developed independently of the others on a perceived needs basis by the then Department of Education. As a result, by 1993, the national curriculum comprised sets of very different subject statements; some developed within the previous decade, others more than thirty years old; some addressed the primary (ages 5-12) and junior secondary levels of schooling (ages 13-14) in separate and largely disconnected documents, others addressed middle schools (ages 11-14), and in the senior secondary school (ages 15-18) the "curriculum" was for the most part represented by stand-alone examination prescriptions. The *New Zealand Curriculum Framework* replaced this *ad hoc* collection of curriculum statements with a series of detailed statements, written in both English and Maori, for each of seven "essential learning areas" (see Appendix A, p. 260) and applicable to all age levels of state schooling.

The format of the statements for each essential learning area marked the second significant change in national curriculum policy design. In seeking to describe across eight progressive levels the learning that was central to each area, national curriculum policy shifted from statements of intended learning based on content to statements of intended learning based on outcomes. Over a period of eight years, these outcomes were defined in each essential learning area by contracted writers employed by the Ministry of Education and responsible to a policy advisory group (PAG) appointed by the Minister of Education. The PAG in each curriculum area set the general direction for the contract writers and it approved, or requested modifications to, their drafts. The composition of the contract writing teams varied by essential learning area but most comprised staff from either university schools of education or stand-alone colleges of education, and teachers from both the primary and secondary sectors. The teams had a strong practitioner element, a feature that was seldom questioned but that was problematic to some of those involved. As one of the writers of the social studies curriculum statement commented:

...[the first writing team were] all excellent classroom practitioners, but with the exception of (Convenor 1) and perhaps (Convenor 2) no-one knew about 'curriculum'. I think it's a Kiwi idea – because you know about the practical, you can do the theoretical (cited in Mutch, 2004, p. 183)

All statements were released in draft form for national comment and were subsequently modified by the writing teams for final release by the Ministry of Education¹. Once the statements were gazetted schools were accountable for demonstrating how students were progressing against the outcomes defined within each curriculum statement. This accountability primarily took the form of reviews (approximately every 3 years) carried out in each school on behalf of the government by the Education Review Office (ERO). The results of these reviews were publicly available and many of the less favourable made the headlines in the national and local media. Thus, while accountability in the form of national testing has never been a

¹ The controversies surrounding the development of the social studies curriculum statement meant that this document went through two revisions before a final statement was released by the Ministry of Education (see Mutch, 1998.1999; and Openshaw, 2000).

feature of New Zealand curriculum, accountability for “delivering” the national curriculum was strongly felt by most New Zealand schools. Another more subtle form of accountability has been evident in the reports of the National Education Monitoring Project (NEMP). These report cohort (ages 8-9 and 12-13) rather than school-related data but the assessments are derived from each of the curriculum statements and as such provide regular information² about cohort performance in relation to the curriculum intentions.

Reviewing the Curriculum Developments

At the time the final essential learning area statement (The Arts) was released in 2000 the Ministry of Education announced that it wanted to evaluate the curriculum reform experience in terms of the appropriateness of the full set of statements to the changed educational, social and economic climate, and in terms of the contribution of these statements to enhanced student outcomes. This project – the *Curriculum Stocktake* - was undertaken during 2001 and 2002. It resulted in a report to the Minister of Education which made eleven major recommendations for the future development of national curriculum (Ministry of Education, 2002).

In response to these recommendations the Ministry was asked to undertake a coordinated review to “reframe, refocus and revitalize the New Zealand curriculum” (Ministry of Education, 2004a). This review - *The New Zealand Curriculum Project* – was begun in 2003. A key goal of this review was to simplify the curriculum for each essential learning area by developing “essence” statements that “encapsulated the fundamental ideas of each learning area ... and ... that clearly articulated important learning outcomes for students” (Ministry of Education, 2004a). This goal was motivated by the *Curriculum Stocktake* finding that the New Zealand curriculum was overcrowded and that this was creating prioritisation and management problems for teachers and schools³. The curriculum, by setting out intended outcomes for students

² Each learning area is on a 4-yearly reporting cycle.

³ By the end of Year 10 students, across the seven essential learning areas of the New Zealand curriculum, were expected to have “covered” more than 500 achievement objectives. Most teachers had little disagreement with this particular Curriculum Stocktake conclusion.

in each essential learning area, had answered the *importance* question – what do students need to learn? - but it had not addressed the much more difficult question of *relative importance* - of all that students could learn that might be important what learning matters most? The development of one page “essence statements” was seen as a way of addressing this issue of relative importance by requiring each learning area to define their *unique and fundamental* contribution to the learning of young people in New Zealand and by auditing for overlap and repetition between learning areas.⁴ More significantly, from the point of view of addressing curriculum overcrowding, the essence statements are also to be used to guide a subsequent process of “achievement objective reduction” in each curriculum area.

Work on the essence statements began in late 2003. The draft statements were submitted to the Ministry in November 2004. The initial phase of achievement objective reduction began in March 2005. The Ministry of Education intends to distribute essence statements and revised achievement objectives for consultation in late 2005.

This process has significant implications for each learning area because it focuses attention on its contribution to the compulsory learning of young people in New Zealand. For subjects whose means and ends are less well understood this process is particularly challenging (Johnston, 2004). In a crowded compulsory national curriculum under pressure to omit rather than add, learning areas such as English, mathematics and science have less of a contribution battle to fight because there is a generally accepted perception of what they do and agreement that it is important. Other areas, however, are less secure. Foremost among these is social studies.

⁴ The Curriculum Stocktake, while recommending a reduction in achievement objectives, added a complication to this recommendation by proposing the addition of an eighth essential learning area – *Learning Languages*. This area was added in 2003.

Background to the Research Problem

In spite of being a core subject in the New Zealand school curriculum for more than fifty years the status of social studies has been under more or less constant challenge. Its hybrid title and consequent lack of obvious connection to established university subjects clouds its popular perception and, for some of its more vocal critics, strains its credibility. It has been variously described as a “mongrel subject” (Cumberland, 1950, p. 18); as “...something less than history or geography, [and] something very much less valuable” (Gorrie, 1963, p. 18); as “sentimental waffle about people” (Minogue, 1996, p. vii); and as both “radically diseased” (Lockstone, 1996), and a “sneaky attack on the minds of the young” (Lockstone, 2000). Criticism has not been restricted to these conservative voices seeking the replacement of the subject with traditional history and geography. The subject has been criticized by liberals for being “insidious in its affirmation of dominant class interests” (Simon, 1992, p. 269); and for being a “discursive and covert agent of socialization and assimilation” (Beals, 2002, p. 210). Even those with an affinity for, and understanding of, social studies curriculum history have been critical of its “vague and essentially non-operational aims” (Openshaw, 1996, p. 169), of its need to define content more specifically (Carrier, 1989), and of its failure to settle on a clear distinctive purpose (Smythe, 1998).

The subject has also been blamed for deficiencies in student knowledge, particularly knowledge of New Zealand history. A survey of Year 7 and 8 students showed that at the culmination of eight years of social studies their factual recall of New Zealand’s history was poor (Barr, 1988). The most recent National Education Monitoring Project report on social studies commented on the need for New Zealand students to develop a much better understanding of historical significance (Flockton & Crooks, 2002). Other authors have been concerned at the role of social studies in relegating historical knowledge to a “miscellaneous jumble” (Low-Beer, 1986); in cultivating “social amnesia”, particularly the forgetting of the history of Maori-pakeha interaction (Simon, 1992); and in undervaluing the need for an extensive information base sourced in “our own essential cultural knowledge”(McGee & McGee, 1992). Students

themselves have also been less than satisfied with the subject. The aforementioned National Education Monitoring Project reported that only 4 percent of Year 4, and 13 percent of Year 8, students rated social studies as their favourite subject. Both these percentages had fallen since the 1997 survey (Flockton & Crooks, 2002). The percentages of students reporting that they had learned “heaps” in social studies had also fallen over the same four year period from 50 to 30 percent at Year 4, and from 29 to 16 percent at Year 8. These falling percentages are particularly significant given that the current national curriculum for social studies was implemented between the 1997 and 2001 surveys. It appears that for students the new curriculum has not helped their perception of the value of social studies.

Reviews of the current national curriculum statement for social studies indicate that the subject continues to face both design and implementation difficulties. The Ministry of Education, as part of the *Curriculum Stocktake* commissioned two external reviews of the national curriculum. The report from the National Foundation for Educational Research in the United Kingdom (Le Metais, 2002) expressed concern about inconsistencies in prescription within the social studies statement, especially the high level of apparent prescription of *Essential Learning about New Zealand Society* and the lesser level for contexts beyond New Zealand (Le Metais, 2002). The Australian Council for Educational Research report (Ferguson, 2002) was more specific and critical. The report acknowledged the excellence of the curriculum aims and objectives, the strength of representation of Maori culture, history and heritage, and the quality of progression in the processes. Overall, however, the report concluded that social studies was “the most unsatisfactory of the curriculum statements examined” (p. 13). It based this conclusion on concerns about the way that the achievement objectives were written, and on the lack of implementation guidance for teachers in relation to teaching approach and assessment. Comparing achievement objectives with those from Victoria, South Australia and the United Kingdom the report was critical of a restricted range of cognitive development and lack of a critical and analytical edge in the New Zealand curriculum statement. The achievement objectives, and associated indicators, were also criticized as being too broad to assist with assessment and the

assessment section was itself regarded as “vague and largely unhelpful” (p. 13). Although it was acknowledged that the curriculum provided some guidance with the approach to teaching social studies it was concluded that the document offered insufficient advice to teachers “to implement programmes that fulfil the aims of the learning area” (p. 13)

The two international critiques provided only indirect evidence of implementation because they were based on *interpretation* of the curriculum rather than on what was happening in schools. The Education Review Office (2001), however, based their report on extensive school and classroom observation. They were highly critical of the quality of implementation. They observed that the achievement objectives and the indicators that support these objectives were poorly understood by teachers who were “unsure of the intent of the achievement objective and do not see the social studies concepts buried within them” (p. 1). This was particularly so for large numbers of teachers, especially in primary schools, who do not have a social studies background and was compounded by the complexity of requirements within the curriculum. As a result, the report damningly concluded that “students often experience ‘hit and miss’ social studies programmes that can result in shallow learning. It is rare for students to be engaged in a sequence of activities that have a purpose” (p. 3)

These criticisms place the development of an essence statement and of a revised structure based on a reduced number of achievement objectives under considerable pressure. The new national curriculum introduced in 2000 has not mitigated the historical criticisms of social studies. In some respects, they have strengthened with the recent international critiques of the curriculum design (Ferguson, 2002; Le Metais, 2002) and the classroom-based critique of implementation of the new curriculum (Education Review Office, 2001). The essence statement and achievement objective reduction processes are perhaps the final opportunity in the subject’s curriculum history for it to achieve, through effective curriculum design, greater clarity about its nature and contribution as a compulsory subject within the national curriculum.

Otherwise the twin pressures of curriculum reduction, and the demand for transparency of content and purpose, may irresistibly lead to the loss of social studies identity as a subject and its replacement by the more publicly understandable, and acceptable, history and geography.

Aims of this Thesis

This thesis aims to inform this curriculum development process by analysing the history of social studies curriculum design in New Zealand and by using this analysis to make recommendations about the current design process. Engagement with past experience has not always received close attention from curriculum researchers in New Zealand (Openshaw & Archer, 1989), nor from curriculum developers whose prime motivation is usually to develop curriculum that responds to new and anticipated future conditions (Pratt, 1980). The *Curriculum Stocktake*, for example, identified such changes as “digital literacy” and “globalisation” as two important influences on the future of curriculum (Ministry of Education, 2002, p. 5). Likewise the *Curriculum Project* seeks an “up-to-date curriculum that reflectsthe knowledge needed for the future” (Ministry of Education, 2004b, p. 1). While the future shape of society is clearly an important consideration in curriculum development, the chequered history of social studies curricula in New Zealand is such that a curriculum for the future should not be developed without a sustained attempt to learn from lessons of the past⁵. As New Zealand’s most prominent historian of social studies education has recently observed, the unresolved contradictions within the subject are such that “any future social studies curriculum document should ... be the product of a serious and sustained engagement with the subject’s political and intellectual history” (Openshaw, 2004, p. 280). Pawson (2002), commenting more generally, advances a similar argument:

Like all of the best ideas, the big idea here is a simple one – that research should pass on the collective wisdom about the successes and failures of

⁵ The current social studies curriculum statement was informed by a paper written by staff at The University of Waikato (Barr et al., 1997). This paper did draw on the history of social studies to establish the subject’s nature and purpose. It did not, however, specifically address issues of curriculum design.

previous initiatives... The prize is also a big one in that such an endeavour could provide the antidote to policy making's frequent lapses into crowd pleasing, political pandering, window dressing and god acting. (p. 160)

Because of its relevance to the current phase of national curriculum development, and because it has received little detailed attention in the research literature on New Zealand social studies, this thesis approaches this historical analysis from the perspective of curriculum design.

Defining Curriculum Design

The term "curriculum" has a broad and varied use in the literature. Marsh & Willis (2003), for example, discuss eight different definitions and propose a further definition; Oliva (2005) considers the term to be "amorphous"; and Grumet (1988, cited in Oliva) depicts the field as one of "utter confusion". While such proliferation and confusion of meaning may seem alarming, many of the differences are more apparent than real because of the contexts in which the term is being used. If, for example, the term is used to refer to the curriculum for a whole school it may well include reference to planned and unplanned (hidden) learning. If, however, it is being used at the classroom level its use may be restricted to either planned learning experiences within a particular subject (the intended curriculum), or to what is actually taught by teachers (the implemented curriculum), or to what students actually learn (the achieved curriculum).

Because this thesis is focused on curriculum at the national level within one subject, the term curriculum is used here to refer to *formal written policy statements of learning intentions mandated by central government*. In the past, terms such as "syllabus", "prescription", "curriculum document" and "curriculum statement" have been used interchangeably to refer to nationally mandated statements. They are, therefore, used synonymously throughout this thesis. Curriculum at the national level is sometimes

referred to as the *entitlement curriculum*. In other words, the curriculum that “society believes learners should expect to be exposed to as part of their learning to become effective members of that society” (Print, 1993, p. 4). It acts as a blueprint (Pratt, 1980) for subsequent actions by implementing agents (for example, teachers and resource developers) who develop learning experiences to enact the curriculum.

The entitlement curriculum for a particular subject usually comprises four main elements (Print, 1993; McNeil, 1996; Taba, 1962; Westbury, 1999). These express

- the purpose of the subject,
- the intended learning, including content selection,
- the recommended teaching and learning approaches, and
- the approach to assessment.

Curriculum design, the major focus of this thesis, refers to the way in which these elements are arranged and expressed in formal written policy statements of learning intentions mandated by central government.

Relationship to Previous Research in New Zealand Social Studies

The definition of curriculum design adopted here positions design at the national level as an outcome and distinguishes it from curriculum development - the process of creating the design. This is not to deny the importance of process in influencing design. In fact design, as defined here, is an enduring artefact of process. The research literature on New Zealand social studies, however, has already paid considerable attention to the process of curriculum development and to the influences on that process, particularly in relation to the development of the current curriculum. Lewis (1980) documented the role of the various participants in the design of the 1977 curriculum. Mutch, in her doctoral thesis (2004), and in a series of related articles (1998, 1998/1999), tracked the tortured and circuitous development path of the current curriculum as it “wound from left to right, pulled by competing ideological and

political forces (1998/1999, p. 69). Openshaw (1999, 2000) analysed the submissions on that curriculum and articulated the controversies and historically unresolved tensions that plagued its development. Hunter and Keown (2001), two of the writers of the final version of the current curriculum, published an “insider’s perspective” on the development process describing the two dominant “voice groups” – the educationally conservative and the neo-liberal - that attempted to influence the design and the ways in which the writers responded to these forces.

What this thesis offers that is different is a focus on curriculum design *as an influence on subsequent sense-making by teachers and other implementing agents*. The prime focus here, therefore, is not on the already well-documented nature of the “contestation and struggle” (Openshaw, 2004a, p. 12) that has characterised New Zealand social studies curriculum history but on the impacts of this history on the *detail of design* and the implications of this for teacher learning about social studies and about the State’s intentions for student learning in social studies. Curriculum design at the national level is viewed here as a blueprint that aims to communicate purposes and intentions and that, therefore, influences the way that those who read the curriculum understand the subject, and the way that those who implement it teach the subject to their students. If its expression is ambiguous, contradictory or unclear it harms the integrity of the subject and has the potential to compromise subsequent curriculum decision-making by clouding sense-making (Spillane, 2000, 2004; Spillane et. al., 2002).

In a recent plea for the need to pay greater attention to design, Pawson (2002) claimed that in the field of evaluation “programme design is often a research-free zone” (p. 160) because most projects investigate the processes of implementation and impact rather than the design product from which those processes derive. So, while this thesis attends to implementation and impact, it does so in relation to the role that design and cognition play in these processes and with the express intention of improving future design to enhance subsequent alignment between design and implementation. As Wiggins and McTighe (1998) comment, the effectiveness of design “corresponds to

whether (it has) accomplished (its) goals for the end users” (Wiggins & McTighe, 1998, p. 7). While the ultimate end users of curriculum are students, the immediate end users of national curriculum are teachers and resource writers who turn national policy into the planned and implemented curriculum.

This is not to naively suggest that there is a linear relationship between design and implementation and that national policy can, or should, somehow be teacher-proofed to ensure fidelity of implementation. As Wenger (1998) has argued:

Learning cannot be designed. Ultimately, it belongs to the realm of experience and practice. It follows the negotiation of meaning; it moves on its own terms. It slips through the cracks; it creates its own cracks. Learning happens, design or no design. (p. 225)

This complexity does not, however, absolve the curriculum designer of all responsibility because, as Wenger subsequently argues, “recognizing that communities of practice will generate their own response to design does not imply that they must be left to their own devices” (p. 234). The goal, as Davis and Krajcik (2005) explain, should be to produce a curriculum resource that communicates the essence of intention and that promotes teachers’ pedagogical design capacity so that they can “participate in the discourse and practice of teaching; rather than merely implementing a given set of curriculum materials” (p. 6). At the level of national curriculum policy, the successful communication of curriculum essence is particularly important because the normative nature of national curriculum cannot be ignored. In responding to the claim by Pinar and his colleagues (1995) that curriculum is unreasonably controlling on teachers and students, Hlebowitsh (2005) argues that design is critical because:

the school curriculum has some obligation to create experiences that will fulfill obligations tied to the public interest ... if we forsake the work of design, we essentially forsake our commitment to the normative experience of the school. (p. 4)

In other words, design serves the important function of channeling school experience by selecting from the vast array of possibilities the communally prized knowledge and

understandings that otherwise might not be developed (Hlebowitsh, 2005). Design, therefore, expresses intention and, as such, it matters what sense teachers make of it. It establishes a normative agenda from which teachers, for reasons of equity, are required to accept some direction, not in the sense of “scripting” action, but in the sense of “channeling, focusing and professionalizing teacher judgment” (p. 13). Just as these judgments can be evaluated against intention so the design itself can be evaluated for its efficacy in communicating its normative agenda. As Beeby (1970), a former Director of Education in New Zealand, was to observe after the failed implementation of aspects of the secondary school curriculum in the 1950’s: “No change in practice, no change in the curriculum has any meaning unless the teacher *understands* [italics added] and accepts it. This is a simple but fundamental truth that no curriculum builder can ever forget” (Beeby, 1970, p. 46). In other words, understanding – a substantial design responsibility – and acceptance – in the end a teacher decision – interact with each other in implementation. What is being claimed here, therefore, is not that design is a *determinant* of implementation; rather that it is an *important ingredient* (Ball and Cohen, 1996) because, as an expression of government policy it matters how teachers understand its intentions.

In summary, therefore, this thesis is distinguished from previous work in the field by two main features. First, it focuses on design as a stimulus for teacher sense-making rather than focusing as previous research has done on the contentious, political process of development. Second, it utilizes a framework that draws on aspects of cognitive psychology to better understand the relationships between design and sense-making rather than the sociological frame that has been more commonly adopted in New Zealand to understand the processes of curriculum development and implementation. This is not to deny the significance of power relations in curriculum development, nor the significance of their impact on curriculum content and design. In fact this thesis will argue that the increasing cognitive complexity evident in successive iterations of New Zealand social studies curriculum has its roots in the unresolved power struggles within social studies. It aims, at least in part, to contribute a psychological perspective on a sociological problem and to shed further light on the cognitive consequences of

developing curriculum without recognising, and attempting to resolve, the social and political tensions inherent in the process.

Overview of Research Questions and Thesis Organisation

This thesis addresses three research questions:

1. What does the research literature reveal about the characteristics of curriculum design that enhances sense-making by implementing agents?
2. What design patterns are evident in the four official expressions of social studies curriculum in New Zealand – 1942, 1961, 1977 and 1997 – and what are the likely implications of these patterns for sense-making?
3. What parameters and structures should inform the process of social studies curriculum design currently being undertaken by the Ministry of Education in order to improve sense-making and to enhance the quality of future implementation?

Part One of the thesis is organised around the first research question. It develops the theoretical framework for the subsequent analysis of New Zealand social studies curriculum in Part Two and for the development of guidelines for future developments in Part Three. Chapter 1 begins by examining the research literature on the relationship between curriculum design and curriculum implementation. It argues that while this relationship can vary greatly in direction and strength most implementing agents make a genuine attempt to understand the intent of curriculum policy. Using a model developed by Spillane and his colleagues (2002, 2004) the cognitive processes involved in this sense-making are explained - in particular, the nature of, and relationships between, individual cognition, the social context of cognition and the external representation of policy. The chapter draws on Spillane's research to explain how schemata affect sense-making about policy and identifies the implications of cognitive explanations of implementation for curriculum design.

Chapter 2 extends Spillane's cognitive analysis by examining in further detail the role of policy complexity and policy coherence in the sense-making process. Complexity is discussed by analysing the role of language in design and the ways that language can interact with the schema of implementing agents to create misunderstandings and confusion. Design complexity is also a function of the number of curriculum elements that implementing agents typically need to consider and the interactions between these elements. The implications of this complexity are explained in relation to cognitive load theory (for example, Chandler & Sweller, 1991; Sweller, 1994; Sweller et al., 1998). This theory distinguishes between the inherent difficulty of the task (in this case, curriculum interpretation) and the added difficulty imposed by design. Approaches to reducing this added difficulty are discussed and conclusions are drawn about strategies for improving curriculum design. Policy coherence is considered by examining the philosophical possibilities and tensions that curriculum design needs to address. These possibilities and tensions are represented as three continua – student-centred versus subject-focused; process versus content; and open-ended versus target-driven. The implications of attempting to accommodate these extremes are discussed by examining the extent to which they are complementary or contradictory and by discussing the consequences of eclectic design. Part One summarises the theoretical cognitive framework developed in Chapters 1 and 2 in the form of six major recommendations for curriculum design.

Part Two uses the theoretical framework developed in Part One to analyse curriculum design in New Zealand social studies since 1942. Chapter 3 describes the approach taken to analysing the texts of the four curriculum designs – 1942, 1961, 1977 and 1997 – and summarises the three main patterns that emerge from this analysis. These patterns form the basis of the discussion in the three subsequent chapters.

Chapter 4 analyses the way that the four curriculum designs have addressed the existing schema of implementing agents as the designs introduce new ideas about the purpose and nature of social studies. It examines three main shifts in meaning – the

initial move away from history and geography; the later shift away from social studies as the study of people's way of life towards the study of human behaviour and of society; and the move away from progression by topic to progression by pre-specified outcome. The chapter discusses the approaches taken in each of the designs to these shifts and examines their consequences for sense-making. The chapter draws conclusions about the ways in which design needs to acknowledge and engage the existing schema in order to enhance understanding of, and commitment to, new approaches.

Chapter 5 moves the analysis from comparing the impact of successive designs on sense-making to examining the internal coherence of each design. The relationships between curriculum elements, and the way in which the curriculum designs attempted to represent these relationships, are analysed to determine the extent of consistency and alignment within each design. The analysis examines the ways that design has attempted to achieve structural coherence. It also distinguishes between alignment at the structural level and between these structures and the detail of the curriculum. It examines the consequences for implementation of misalignment at the level of detail. This is important since it is the detail that usually corresponds most closely to what teachers have to do in the classroom and which, therefore, most attracts their attention. The chapter concludes with recommendations about the approach that curriculum design needs to take to the issues of internal coherence and alignment.

Chapter 6 examines the levels of complexity that have been built into the various designs in order to support a tradition of teacher flexibility and choice around content selection. It discusses the two main approaches taken to flexibility – the use of “recommended” studies; and the use of open objectives surrounded by general accountability requirements. It examines the consequences of each approach for sense-making and incorporates a case study to analyse the complexities surrounding the open objectives approach characteristic of the current curriculum. The case study, based around teaching the concept of national identity, illustrates the sense-making

process demanded of teachers as they implement the curriculum in their classroom. Cognitive load theory is used to examine the role of the curriculum design in supporting this sense-making. The chapter also examines the consequences of complexity for implementation in relation to the subject knowledge background of teachers. It explains how complexity and teacher knowledge can combine to produce superficiality of coverage and consistent omission of important curriculum content. It concludes by recommending how social studies curriculum design can better represent the twin but often competing aims of teacher flexibility and external accountability without building an inhibiting cognitive load into the design.

Part Two concludes with a reassessment of the design criteria proposed at the end of Part One. Based on the historical analysis of social studies curriculum policy documents, the criteria are elaborated as a set of seven design propositions that form the basis for the curriculum recommendations developed in Part Three.

Part Three draws on the analysis of the first two parts of the thesis to argue for a curriculum design that addresses the problems of the past. Chapter 7 begins the process of developing a more coherent future design by making the case for a clear, unequivocal and significant purpose for the subject. It argues that the strongest justification for social studies is its contribution to citizenship education and that the subject's content and learning processes should be aligned to the development of knowledge and skills that are consistent with this purpose. It outlines the need for enhanced civic literacy in New Zealand and draws on both theoretical and curriculum literature about citizenship education to define the "essence" of the subject in citizenship education terms.

Chapter 8 proposes an essence statement for the subject based on a citizenship education purpose and suggests how a coherent curriculum structure might be derived from this statement. The content and format of the essence statement, and of the associated curriculum structure, are explained in relation to the design propositions

developed as a result of the cognitive and historical analyses in Parts One and Two of the thesis.

Chapter 9 summarises the main findings of the thesis in relation to each of the research questions. The chapter concludes by explaining the limitations of the research findings and identifies research that needs to be undertaken to evaluate the efficacy of the design propositions.

Summarising the argument

The thesis is sourced in a pressing practical problem: the need, as part of the Ministry of Education *Curriculum Project*, to develop an “essence statement” that reflects the purposes, content and outcomes of social studies; and the need to also develop an aligned structure that reduces the number of prescribed achievement objectives. It is argued in this thesis that the historical and continuing problems of social studies cannot be resolved through a new design without understanding the cognitive processes by which implementing agents make sense of design, and without understanding previous attempts to represent social studies’ nature and purposes. A cognitive, sense-making perspective is deliberately chosen because of the pressure it places on design. It is often too easy to pass off the problems of design onto subsequent professional development. While this thesis acknowledges that professional development is an important aid to understanding it argues that unless design pays explicit attention to sense-making, future professional development will continue to battle misunderstanding and confusion. In a subject as fragile as social studies this would be a precarious position in which to leave it. In a crowded and increasingly pressured national curriculum it may be expecting too much to rely on the “dead hand of tradition” (Barton & Levstik, 2004, p. 27) to preserve the subject.

**PART ONE: THEORETICAL FRAMEWORK FOR UNDERSTANDING THE
ROLE AND NATURE OF CURRICULUM DESIGN**

CHAPTER 1

The Relationship between Implementation and Design: The Nature of Sense-Making

Oliva (2005) depicts the various relationships between curriculum design and implementation as a series of models expressed in the form of differing arrangements of intersecting circles (Figure 1).

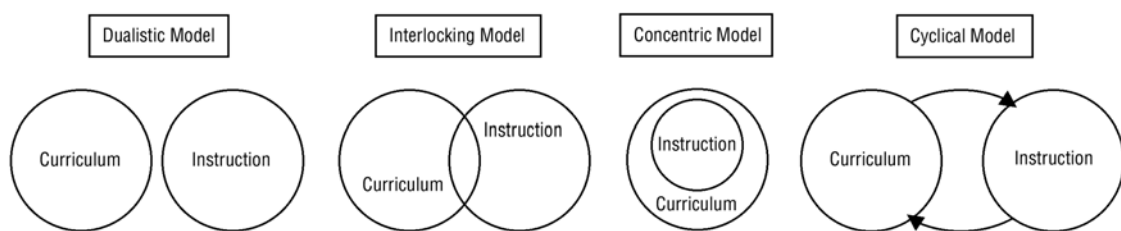


Figure 1: Possible Relationships between Curriculum Design and Implementation (Oliva, 2005)

At one extreme – the dualistic model - the circles are disconnected. This describes a situation in which there is no relationship between curriculum design and implementation: what takes place in the classroom is unrelated to the curriculum. It reflects what Ball and Cohen (1996) describe as the “idealised image of the individual professional” (p. 6) whose creativity is deemed to be so infected by external directives that such directives are ignored. While there are those in New Zealand who espouse such autonomy and freedom, the centralised, mandated and audited curriculum system mitigates against the widespread adoption of a position that completely disconnects implementation and design.

The other models in Figure 1 all depict a form of relationship between design and implementation. What varies is the degree of this relationship. In the interlocking model what takes place in the classroom is referenced to the curriculum but the curriculum is not paramount. By contrast, the concentric model represents a situation where the curriculum dominates instruction. This model reflects a fidelity perspective

on design (Fullan & Pomfret, 1997) where its success is judged by the extent to which it is implemented as intended in the classroom. The cyclical model represents a continuous adaptive relationship between design and implementation. The curriculum is an important influence on what happens in the classroom but it is itself modified by classroom experience. Using the analogy of a play, Marsh & Willis (2003) depict such adaptation of curriculum as inevitable because the text of the play (the curriculum design) is always *interpreted* by directors and performers. It has, however, a fidelity component as well because this interpretation cannot be so extreme as to bear no relationship to the text of the play.

However tenuous or strong the relationship, the interlocking, concentric and cyclical models depict a form of relationship between design and implementation. Whereas early research largely ignored the detail of this relationship, viewing it as something of a “black-box” (Fullan & Pomfret, 1997) between input (curriculum policy) and outcome (curriculum in use), current research is beginning to examine the mechanisms by which design is implemented in practice. This chapter examines these mechanisms within a comprehensive cognitive framework that draws on research about ‘sense-making’ from policy. This framework has been developed from the work of Spillane and his colleagues⁶. Their work is selected here not only because it synthesizes a wide range of research in the policy implementation field but more particularly because of its cognitive focus on the interacting factors that influence teacher understanding of policy. Given that this thesis is seeking to understand the expression of curriculum policy from a sense-making perspective Spillane’s framework is particularly apposite. Subsequent chapters extend Spillane’s analysis to a consideration of the roles of language, complexity and coherence in policy design.

⁶ Spillane has published many articles on policy implementation and sense-making, often in collaboration with others. Throughout this section of the thesis most reference is made to just two of these sources – Spillane et. al. (2002) and Spillane (2004). The reason for this is that these two publications summarise, and make specific reference to, the findings of much of his other work. Where different insights are offered by this other work they are referenced separately.

Sense-making From Policy

Conventional accounts of policy implementation explain decision making as a function either of human will, or of human capacity, or of the quality of policy signals. Thus policies fail to get implemented because they are actively resisted by implementing agents, or because the implementing agents lack the knowledge, skills or resources, or because the policy is weak and unclear (Spillane, 2004). These conventional accounts are not incorrect but they are incomplete because they assume “that implementing agents understand what policy agents are asking them to do” (Spillane et al., 2002, p. 391). On the basis of seven years observation and analysis of the implementation of mathematics and science curriculum standards in Michigan, Spillane argues that what needs to be added to accounts of policy implementation is the role of the “process of human sense-making” (Spillane, 2002 et al., p. 419) and the preservation of existing understandings that is built into this process.

Contrary to conventional accounts of implementation, Spillane claims that teachers actually have good intentions when it comes to implementation. They genuinely seek to work out how to put their interpretation of ideas into daily practice by constructing messages from policy. In doing so, however, they may misconstrue, rather than deliberately undermine policy intentions and operate on misunderstandings or partial understandings of policy. This “unwitting and unknowing undermining” (Spillane, 2004, p. 169) whereby reform ideas are reconstructed is a cognitive process in which implementing agents “first notice, then frame, interpret and construct meaning” (Spillane, 2002 et al., p. 392) from policy. This sense-making process develops in the interactions between three main elements - the knowledge, beliefs, and experiences of the individuals who are implementing the policy (individual cognition); the context within which these agents are making decisions about implementation (situated cognition); and the external representation of the policy signal (Spillane, 2002 et al., p. 388-389). Each of these elements is examined in sections that follow.

The Role of Individual Cognition in Implementation

Information processing theory explains individual sense-making as a process by which new information (in this case, policy) is interpreted through the existing knowledge structures of long term memory (schemata or scripts) (Nuthall, 1999, p. 304). Mental representations of new ideas are not read directly from the external source rather they develop in the interaction between the external experience and the structures of relevant schema in long term memory. These structures are the result of successive “generalising or abstracting” from a sequence of similar experiences in which the details of the original experience are lost but the “concepts, principles, activity patterns, procedures, ideas, [and] beliefs” remain (Nuthall, 1999, p. 304). These generalised structures are critical in helping people make sense of new information through short-cutting the need to understand the detail of every new experience. This short-cutting process, however, and the generalised nature of schemata, can act to interfere with the intent and meaning of external messages thus rendering the process of sense-making as essentially conservative (Spillane, 2004). New information supplements but does not supplant existing knowledge and practice (Spillane et al., 2002). The generalised and automatic nature of schemata means that we rely on “surface or superficial similarities between new knowledge about something and our existing scripts for that something” (Spillane, 2004, p. 78).

These findings have two significant implications for policy design. First, Spillane (2004) has observed that implementing agents, influenced by the expectations of their existing schema, “often over-interpreted reform ideas as similar to some of their existing ideas” (p. 79). Thus the new policy idea of mathematical problem solving was incorrectly interpreted as identical to previously used story problems and as an approach to teaching procedural mathematical knowledge rather than as a context for developing both procedural and principled mathematical knowledge. Second, Spillane observed that the short-cutting process associated with the role of schema and understanding, influenced what implementing agents noticed in the policy. Most often they attended to the surface features of the policy rather than the deeper structural or

conceptual changes (p. 81). For example, implementing agents came to understand the policy focus on “hands on science” as “learning by doing”. In other words, they understood it as a motivational device and as an approach to extending the menu of learning approaches by accommodating a broader range of student learning styles. What they missed were the deeper conceptual ideas about student question posing, solution testing and defence and justification of ideas.

While it may be tempting to attribute these misinterpretations of reform to a lack of commitment or effort, or to a lack of attention to the reform, Hill (2001) found that significant misunderstanding of reform intentions can occur in spite of the considerable time allocated to discussion and attempting to understand the reform. This strengthens the claim of a cognitive explanation: a claim that is further reinforced by Spillane’s (2004) observation that a minority of teachers who had more sophisticated understandings of mathematics and science education before the reform, did implement the deeper and fundamental changes proposed by the new policy. These teachers’ greater knowledge of the subject helped them understand that there was much to learn from the reform and they invested greater effort in making changes. By contrast, those with more limited subject knowledge were not aware of their lack of understanding and “perceived no need to develop understanding” (p. 94). Thus, the sophistication of the schema of subject experts enabled them to extract and process deeper messages and understandings from the policy than their less experienced or knowledgeable colleagues.

A related influence on individual sense-making is the role of the historical context that precedes a new policy. School subjects are not fixed objects (Goodson, 1984; 1995). They evolve as those who develop curricula conceive the subject in new ways. These histories become part of the schema of teachers who perceive the subject through the lens of their own teaching or the lens they developed as learners of the subject. These conceptions are often strongly formed and obdurate (Lortie, 1975). Drake et al. (2001), for example, found that teachers’ implementation of a mathematics curriculum reform

varied according to their mathematics life histories. Schema developed in such histories about the nature and purposes of the subject influenced subsequent sense-making. Those teachers whose own mathematics experience as learners had been turned around by affective changes focused on implementing aspects of the reform that helps student enjoy mathematics. Those whose earlier experiences of mathematics were largely negative remained locked into very traditional approaches to teaching and saw few opportunities, or need, for substantive changes.

Individual cognition is not merely a function of the activation of schema held in long term memory. The process of cognition is also influenced by values and emotions. This is especially significant in the case of policy because reform often challenges core beliefs and behaviours about teaching and learning and, therefore, about self-image as a teacher (Spillane et al., 2002). The form of reasoning applied by implementing agents, therefore, may be biased towards defending current practices as being consistent with the reform, not simply because they are making significant connections to existing schema but because they are preserving their self-image. Implementing agents who are strongly motivated in this way may be selective in their reasoning, noticing the aspects of their current practice that are consistent with the reform and claiming, therefore, that the reform is nothing new. Or they may be biased towards discounting new ideas as being inconsistent with the realities of teaching as they know them (Spillane et al., 2002).

A teacher's emotional commitment to a subject can also influence cognition. Spillane (2000), for example, reports on a teacher who enacted reform very differently in English than she did in mathematics because of her personal enthusiasm for English, and her perception of its worth to students, compared with her narrower and less passionate view of mathematics. This teacher's understanding of the reform in each subject was strongly influenced by her emotional commitment to the area of reform. Hargreaves & Lasky (2004) refer to this as a dimension of the "emotional geography" of teaching – the pattern of "closeness or distance (to a reform idea) that helps colour

our response to it" (p. 105). An implementing agent's commitment to a subject can influence their commitment to reasoning about the nature of, and need for, change.

Situated Cognition

The second element of Spillane's model is the contextual dimension. This dimension acknowledges that sense-making is more than an *individual* process. It is a process that occurs in a particular context which influences both the receipt and interpretation of the policy.

Context and the receipt of policy

The notion that policy reaches implementing agents from a single, common source ignores the fact that most policy emerges through multiple lines of communication such as the policy itself, professional development agencies, professional associations, publications and other teachers. Spillane (2004) explains the influence of these multiple communication lines on policy using the metaphor of a telephone game. As the policy is relayed from one source to another the message is subtly changed as a result of the intervening agencies understandings and misunderstandings of the policy. Thus, by the time the policy gets to the teacher, what the teacher ends up understanding is already a variation of the intended policy. This process is of course not as linear as the game metaphor implies. It happens more often in the form of "criss-crossing lines relaying reform ideas" (p. 170) but the idea of individual sense-making based on altered versions of policy is still a significant one and challenges the commonly conceived notion of "the policy". As Spillane suggests, "policy might best be thought about as plural rather than singular" (p. 172) with the multiple versions not necessarily being consistent with each other, nor with the intended source policy.

Context and the interpretation of policy

Just as the receipt of policy is not an individual experience from a single source, neither is the interpretation of that policy solely an individual activity. Individuals draw on the expertise of others to work out what particular policies require of them. This collective expertise is distributed across multiple communities in the same ways that

the lines of communication of policy are distributed – professional development agencies, professional associations, and colleagues in schools. These communities mediate individual sense-making as they assist with policy interpretation. The extent to which the policy message is understood as intended depends upon the sense-making resources of these communities which are “unevenly distributed and deployed” (Spillane, 2004, p. 94). Especially significant from a sense-making perspective are the social and intellectual resources supporting implementation – the presence and use of subject matter experts, the strength of social networks, norms of trust, and the context of the classroom.

Spillane (2004) found that those with greater initial subject expertise were more likely to focus on the deeper aspects of the reform, were more likely to recognise that there was much to learn from the reform and were more likely to invest greater effort in making changes. The presence, and use, of these experts expands expertise in the field and helps to create “a critical mass of individuals with deeper level understandings of the ideas pressed by the standards” (p. 97). Where this expertise was available, but not mobilised, understanding of the reforms was much more limited.

Social networks that extend beyond the individual teacher or school, especially those that are established over a period of time, enable the implementing agents to source a breadth of expertise that enhances interpretation of the reform. Spillane found, for example, that districts that forged strong links with university researchers and with professional associations, themselves with a strong research focus, were better able to develop their knowledge of the reform and, more particularly, were able to do this in ways that linked the reform to research and their particular implementation context. The knowledge they developed about policy was deeper and more usable. Critical to the success of these networks in enhancing sense-making was the alignment between the requirements of the policy and the resources provided by the networks. For example, Spillane (2004) reported that networks which focused specifically on

materials and research related to the intent of the mathematics reforms were more efficacious than generic courses and workshops.

The impact of social networks is enhanced by the expertise of its members but this expertise will have little impact on sense-making unless the levels of trust surrounding collaboration are high. The willingness to discuss and debate varying interpretations of policy, to consider the insights of others, and to acknowledge the inconsistencies and flaws in one's own interpretations are all facilitated by high levels of trust. As Spillane (2004) comments, "trust... was a requisite for the sort of genuine conversations about instruction that enabled district policy makers to grapple with the meaning of the standards" (p. 103). Spillane found that sense-making was enhanced in schools where staff worked actively to build a culture of discussion about materials and techniques, and where observations and discussions of colleagues' teaching was encouraged. These schools created "sense-making opportunities" by viewing "conversations among teachers as opportunities for them to grapple with the meaning of the reform proposals and to develop an appreciation of what these proposals entailed for classroom practice" (p. 165). Others have made similar observations. For example, Veugelers and Zijlstra (2004) reported that teachers valued networks because they were able to learn from others' experience, to use each other's expertise, and to jointly interpret government policies. Teachers portrayed successful networks as characterised by equality among participants ("giving and taking") with considerable informal contact (phone, visiting) supplementing the formal meeting times. They contrasted the value of such networks with the more formal teacher education processes they had experienced and which they depicted as "passive" and "taking". What these studies reveal is that the level of trust built into successful social networks reinforces expertise and increases the group's sense-making capacity, thus expanding the number of those who understand the requirements of the policy.

The implementation of policy has its most direct expression in the classroom in a teacher's daily work with students. It is limiting, however, to view this

implementation as something which follows understanding of the policy. Understanding also evolves as teachers work with the policy and test it in their classrooms. Spillane, for example, reports on a teacher who reviewed her understanding of the efficacy of new approaches to teaching science when she found that students were more capable than she expected in working with these approaches (Spillane et al., 2002). Thus, the situated context of cognition extends beyond interactions with colleagues to interactions with students in the classroom: interactions which further influence teacher interpretation and implementation of policy.

External Representations of Policy

The third element of Spillane's model is the expression of the policy itself. Although Spillane argues, consistent with cognitive theory, that the meaning of policy lies in the individual and collaborative construction of meaning, rather than the policy *per se*, it is clear that the policy, and its design and expression, plays a central role within a sense-making framework. As Spillane (2004) explains, "although policies cannot construct understanding for implementing agents, the message and design of policies influences implementing agents' sense-making efforts" (p. 414). To this end Spillane makes specific recommendations about the way that policy needs to be represented to enhance sense-making. These recommendations are developed from the findings of his research on individual and situated cognition. They are important in all contexts but become more important the greater the change in behaviour, and schema, required by the reform.

Firstly, the design needs to communicate the rationale for the reform thus encouraging implementing agents to go beyond the surface features and to recognise the deeper conceptual understandings inherent in the reform. A related second feature is that the design needs to build on, and engage, implementing agents' prior knowledge. In other words, it needs to recognise existing schemata and misconceptions about the new policy that might arise from these schemata.

There is, however, a difficult balance to be achieved here. If the policy creates too much dissonance from current practice, the desire to preserve self-image may mean that teacher sense-making is severely compromised by strong resistant emotions. On the other hand, if the policy does not challenge existing schema in some way then implementing agents are likely to only attend to superficial aspects of the design. Spillane is not specific about how this balance might be achieved but Wiggins and McTighe (1998) illustrate an approach that is consistent with Spillane's recommendations. In their book advocating a change in the way that teachers should plan they include throughout the text what they call "misconception alerts". These statements are highlighted within the text and anticipate possible misunderstandings that readers may associate with the content. Each misunderstanding is then briefly addressed. For example, Wiggins and McTighe (1998) address a common misconception that "evidence of understanding" refers to end-of-teaching tests by inserting into the text of their book the following boxed statement:

When we speak of evidence of understanding, we are referring to evidence gathered through a variety of formal and informal assessments during a unit of study or a course. We are not alluding only to end-of-teaching tests or culminating performance tasks. Rather, the collective evidence we seek may well include observation and dialogues, traditional quizzes and tests, performance tasks and projects, as well as students' self assessments gathered over time. (p. 13)

The possible misinterpretation is acknowledged ("we are not alluding only to end-of-teaching tests ...") and specific examples of alternatives are suggested ("observation and dialogues, traditional quizzes and tests, performance tasks and projects ..."). There is no empirical evidence that the inclusion of such "alerts" within policy design enhances sense-making but they are consistent with the Spillane's recommendation that policy needs to be written in a way that engages implementing agents' prior schema.

Spillane's third recommendation is that design needs to balance general principles and specific examples. The goal of design, Spillane and his colleagues argue, is to communicate "deep underlying principles rather than the superficial aspects of specific

examples" (2002, p. 416). He acknowledges, however, that communicating underlying principles generates a level of language abstraction that may not be helpful to sense-making because abstraction "is susceptible to being understood in superficial and idiosyncratic ways" (2002, p. 416). Likewise, the provision of examples without principles may encourage implementing agents to view their reform as a set of practices and to avoid engagement with the underlying conceptual rationale. In their research into teacher reactions to a new physics curriculum in New Zealand, Fernandez and Ritchie (2003) found that teachers latched onto the content examples that were consistent with the old prescription mentality because, in the words of one teacher, "that's where you have got something to hang onto" (2003, p. 96). In so doing these teachers narrowed the scope of physics as conceived by the curriculum writers and as expressed in the less specifically worded, and new, achievement objectives. Commenting more generally, and based on many years of experience with curriculum and on his analysis of school improvement attempts in the United States, Eisner (2000) noted that:

What members of the field of education in general and curriculum in particular have increasingly come to realise is that given a competition between the general and the particular, the particular will win every time.(p. 354)

The consequences of the particular "winning" are that implementing agents are not required to engage with the more general intent of the policy which in turn inhibits their ability to transfer underlying ideas to the myriad of novel circumstances that are not, and cannot, be addressed by specific examples. Thus Spillane and his colleagues acknowledge a significant tension in design between "communicating abstract principles and being concrete enough to provide adequate constraint on the understanding process" (2002, p. 416).

Although Spillane does not provide specific examples of how such a balance might be achieved he does recommend that design should "begin with examples and then build to generalisations" (Spillane et al., 2002, p. 419). Wiggins and McTighe's (1998)

approach, cited above, suggests another way whereby specific examples (observations, dialogue, quizzes, student self assessment) are integrated within a statement of general principles. It is doubtful, however, that such examples, in themselves, would be rich enough, or closely enough connected to classroom practice, to trigger sufficient connections between the specific and the general. To this end, Spillane recommends that policy must be accompanied by other support for sense-making in terms of supporting resources and aligned professional development.

Although the suggestions of supporting resources and aligned professional development are beyond the curriculum design scope of this thesis it is clear from Spillane's analysis that any official design needs to be complemented by resources that help implementing agents make sense of the policy. This includes mobilising subject expertise to generate a critical mass of people who understand the intent of the reform; fostering the establishment of social networks with researchers and professional associations who work alongside teachers to develop understanding of the reform; building trust so that classroom practice can be discussed openly; encouraging debate not just about what the policy means but also about what it means to put it into practice; and providing resource materials (for example, exemplars of student work that teachers can score) that are aligned to the intention of the reform and that enhance teacher understanding of the reform. The issue of alignment is a significant one here. As Spillane's research reveals, multiple representations of policy that are inconsistent with each other and with the intent of the reform can mean that teacher's sense-making is based on altered, and incorrect, versions of the policy.

Summary of Spillane's Sense-making Model

The purpose of this chapter has been to examine the connections between policy implementation and policy design with a view to identifying implications for design. The discussion has been based around Spillane's model of policy implementation. It is summarised in Figure 2.

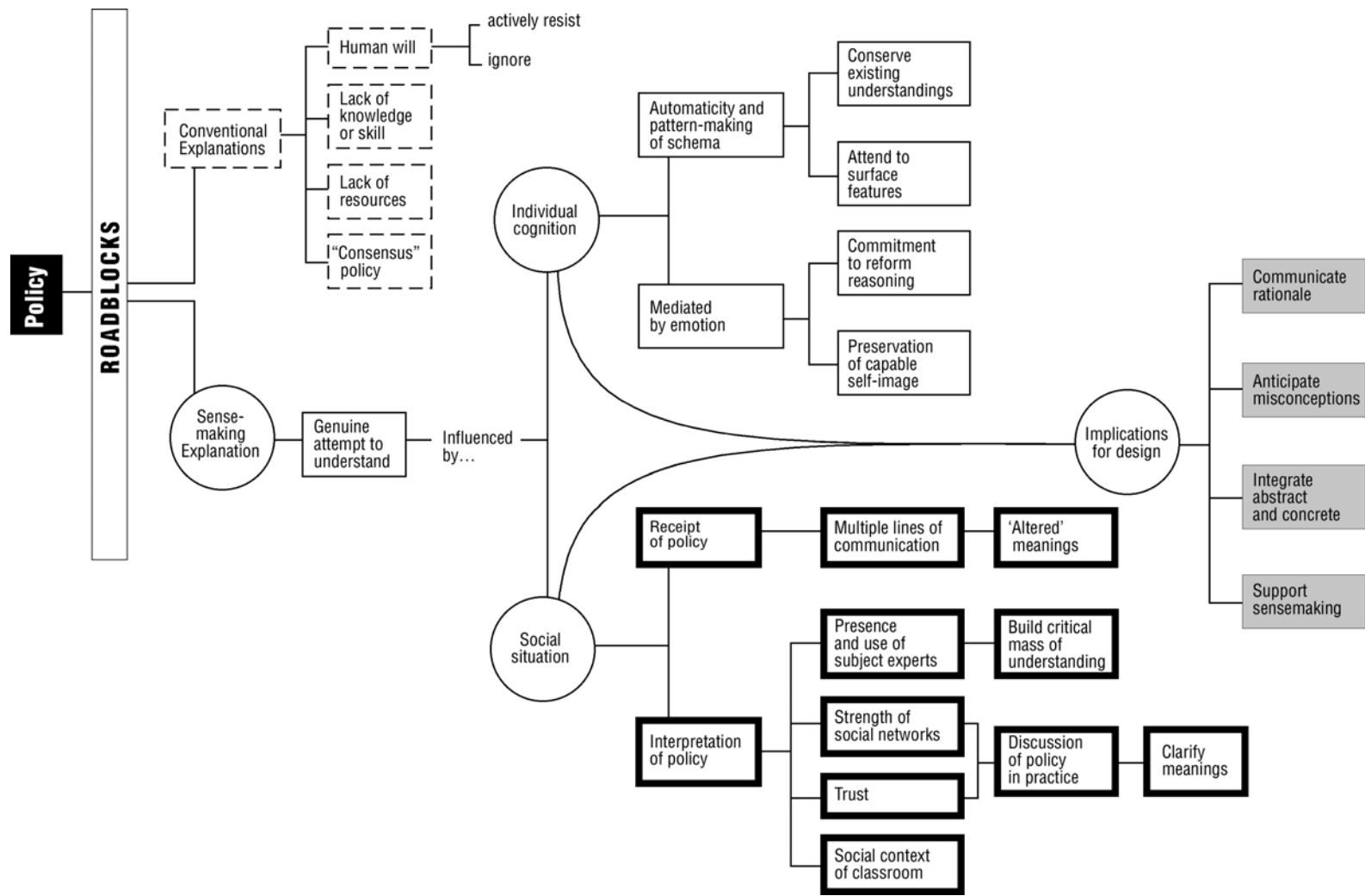


Figure 2: Summary of Spillane's Model of Policy Implementation

Spillane does not reject conventional explanations of roadblocks to implementation but he argues that it is too limiting to explain these roadblocks solely in terms of deliberate actions of avoidance or rejection. His work has shown that more often implementing agents are genuine in their attempt to understand and to implement policy but that they often misconstrue intent. What Figure 2 illustrates is the complex web of relationships that influence understanding of policy.

Understanding is a function of individual interpretation of policy which is powerfully influenced by prior schema and by emotions. It is also influenced by the social situation in which the individual implementing agent is interpreting the policy. This social situation supplies multiple interpretations of the policy in the form of supporting resources, personnel and networks of trust. The level and quality of social support also affects the ability to understand the intention of policy.

It is clear, therefore, that design alone cannot improve the quality of implementation because the intervening factors are so powerful. What Spillane argues that design can do, however, is to reduce the roadblocks to communication by clearly communicating the rationale for the reform, by anticipating possible misconceptions and acknowledging these in the design, by ensuring that abstract principles are given meaning through the use of specific and practical examples, and by supporting the policy with resources that assist sense-making. This form of design will reduce the likelihood of misunderstanding and miscommunication, reduce the pressure on the sense-making resources of the implementation communities, and more significantly, reduce reliance on reform through accountability and inducement by supporting reform from the *outset* with clear policy.

CHAPTER 2

Complexity and Coherence in Policy Design

Spillane's work goes a considerable way towards helping understanding of how policy design can be improved. There are, however, elements of the cognitive process that he acknowledges but that require fuller explanation here given the predominant cognitive orientation on design being adopted in this thesis. These elements are the level of cognitive complexity and coherence built into the design. Complexity refers both to the specific language used to represent the policy and to the number of, and interactions between, elements included within the design. Coherence refers to the logic of the design, in particular the extent to which it avoids internal contradiction. These aspects of design and their cognitive implications are examined in this chapter.

The Role of Language in Design

Written language is the means by which policy is most commonly communicated. Spillane depicts the dominant means of expressing policy as "brief, often one sentence statements passed as goals or objectives" (Spillane et al., 2002, p. 416). The policy assumption is that such representations are clearer to those who read them than more involved and complex written structures. There is evidence,, however, that this might not be so.

A comprehensive analysis of the role of language and policy design and implementation has been carried out by Hill (2001) in relation to teacher interpretation of new state standards for mathematics. Hill observed the work of teachers over a three-day period as they developed their own district standards for mathematics to guide classroom teacher design of daily instruction. These standards were to be aligned with the state standards, in particular with the state's assessment instrument, the Mathematics Mastery Assessment (MMA). The teachers were one step removed

from the classroom but they were all practitioners and the nature of their work was very similar to that expected of New Zealand classroom teachers as they work with national policy documents. New Zealand does not have the intervening district level described in this study but the teachers working at district level were developing guidelines for practice by utilising state policy documents, state assessments and published resources in much the same way as New Zealand teachers do in their own schools. What is most revealing about this study are the disjunctions between the language of state policy and the teacher's understandings of this language.

The Language of Policy and Teacher Understanding

Misunderstandings of the language of policy can develop from lack of domain-knowledge in those who have to interpret the policy, from different pedagogical understandings, as a result of misalignment of language within a policy, or because of the complexity with which the policy is expressed.

Misunderstandings based on lack of mathematical knowledge

Hill (2001) reports on committee discussions of the meaning of such terms as "mode", "median" and "range" and found that the teachers were able, through discussion, to establish the meaning of each term. The same did not occur, however, when it came to understanding the use of the more complex term "discrete math". This was misunderstood as meaning the use of "real world situations" and "models". This misunderstanding led to the elimination of some important aspects of the state's standards. Likewise, the term "algorithm" was variously interpreted as meaning "problem", "rule", or more significantly, because it became the agreed and incorrect position, as writing a number sentence vertically rather than horizontally. What these misunderstandings illustrate are the differences between the worlds of the policy (curriculum) writers and the worlds of practitioners. Terms like "discrete math" and "algorithm" are in common usage by those in the research and policy communities but they are not regularly used in the world of teaching and, as Hill (2001) comments, policy is not "educational enough to communicate what these things are, or how they might apply to small children" (p. 308).

Misunderstandings based on lack of knowledge of new approaches to teaching mathematics

It is not only a lack of mathematical knowledge on the part of teachers that inhibits their sense-making from policy documents. It is also the different, and *legitimate*, meanings that they ascribe to key terms and requirements. For example, when national and state standards use the words “explain, discover, construct” they mean for students to build their own ideas rather than having them communicated by teachers. One of the teachers in Hill’s research, however, interpreted this to mean that students are required to figure out the mathematics for themselves as they listened to, and participated in, a teacher-led presentation. This interpretation is a legitimate interpretation of the need for students to discover or construct meaning but it is not the meaning intended by the policy.

This example further illustrates the differences between the worlds of the policy writer and the teacher. Policy is an outcome of learning opportunities that the policy writers have had that may or may not have been shared by other teachers. Policy writers, especially in curriculum, are usually selected as experts in their field. They have had many years exposure to research and new ideas in the subject and they reflect this in their selection of policy language. The richness of meaning behind this language is denied, however, to those who read the policy and lack the experience that has led to its particular expression. As Hill (2001) comments, “because state leaders assumed teachers would infer certain instructional activities from the standards words, and because teachers have no access to the community [the] reformers worked in, the committee’s decisions did not always reflect the will of the state” (p. 304).

Misunderstandings based on misalignment between various representations of the mathematics standards

Consistent with Spillane’s finding that teachers are often faced with multiple versions of policy, Hill observed that misunderstandings about the intent of the policy arose as teachers worked with policy documents and resources derived from these documents. For example, the objective to “construct, develop and explain a variety of mental

computation and estimation strategies” was interpreted in the instructional resource materials as explicit teaching of a single strategy. The idea of “variety” and the implication of student experimentation with such variety was lost. Likewise, the state requirement to “identify and describe congruence, similarity and symmetry” was interpreted in the instructional resource as “identifies and draws congruent figures and line segments”. In other words, the state requirement to understand the *concepts* was interpreted as being able to carry out a set of *procedures* which may or may not have led to conceptual understanding. This interpretation of the nature of conceptual understanding proved especially problematic. The instructional resource discussed conceptual understanding by explaining that students would learn mathematics through the “practice of ... concepts extended over a considerable period of time”. This distinction is subtle, but again the interpretation of conceptual understanding is a procedural one rather than one that necessarily emphasises the understanding of the underlying principle – evidence that supports Spillane’s observation that implementing agents often attend to the surface features of the policy.

Misunderstanding based on complexity

Hill observed that teachers, when faced with multiple objectives to interpret, had difficulty distinguishing between the requirements of particular objectives. For example, teachers were unclear about the differences in meaning intended by one objective requiring students to “test generalisations based on observations of patterns” and another requiring students to “state rules for patterns”. The researcher herself notes that “meaning-making was also difficult for me. Understanding these sub-objectives, in fact, took consultation with a mathematician and two mathematics education scholars” (Hill, 2001, p. 316). What this example illustrates is not only the complexities of language – in this case subtle differences between similar terms – but also the complexity that arises when a curriculum requires teachers to consider multiple elements simultaneously. The implications of this are explored more fully later in this chapter.

Summarising the Role of Language in Design

Hill's work offers important insights into the nature of curriculum design, depending heavily as it must do on the written word. Consistent with cognitive theory and the role of prior knowledge in learning, she found that words can carry different meanings for those who write the policy than for those who implement it. As a consequence "words, made into standards did not have their intended effect. As teachers imputed conventional definitions to words reformers meant to describe unconventional practices, the state standards lost their force" (Hill, 2001, p. 305). There was a "leakage of intent and meaning" (p. 311) as policy was variously interpreted by those responsible for putting it into practice. As Spillane has argued, what was happening here was not a deliberate undermining of policy but rather a series of genuine misunderstandings "where similar words obscure[d] difference in practice ... thwart[ing] any possibility of coming to an agreement on meaning, [because] people seldom question what they think they understand" (Hill, 2001, p. 313). In some instances the misunderstandings were based on a "supporting" instructional resource that was supposedly "aligned" to the state's standards. This, Hill concluded, was in "some ways more deadly" than an overt political challenge to policy because the disjunctions between policy and implementation remained unrecognised given "human's proclivity to see order, not disorder in their environments" (p. 313). Teachers assume without question that if the implementation materials are being used then the policy is being followed.

Hill proposes design solutions that resonate with, but add detail to, the suggestions put forward by Spillane. Taking the broad view of policy as inclusive of the policy document itself and the associated resources, she concurs with the need to provide a professional development process for teachers rich in the discussion of research and practice so that the language used in policy becomes more commonplace for teachers. She also advocates the need for video tapes of lessons and instructional methods that are accurately aligned with policy so that teachers can work with concrete examples to

infer abstract principles. As far as the particular policy design is concerned she adds two significant insights.

She warns against the proliferation of “sub-objectives” because of the language and level of intellectual complexity that they inevitably add and urges the full development of fewer objectives. This would also involve clear definitions of terms supported by specifics about how these might be enacted in practice. For example, Hill suggests that had “construct, develop and explain” been supported by an activity example such as “students will invent at least two ways to add two-digit numbers mentally, explain these methods to the class, and discuss the benefits of using one algorithm over another” the meaning of the instructional words would have been much clearer and teachers would have realised the difference between the meanings of these terms, and their meanings in common practice.

As Hill’s work illustrates, the process of interpreting curriculum policy is intellectually challenging. While she addresses the issue of cognitive complexity associated with reconciling the meanings associated with the use of similar terms she does not specifically address two other difficulties that are inherent in curriculum design - the need to represent multiple elements within one document, and the need to reconcile strongly competing conceptions about the nature of curriculum in a manner that is coherent for the reader.

Representing Multiple Elements in Curriculum Design

Curriculum design includes statements about purpose, content selection and progression, teaching and learning approaches, and assessment. In implementing the curriculum, teachers are expected to integrate these elements to develop schemes of work, lesson plans and, in particular, instructional activities. From a cognitive perspective, such integration of elements imposes a load on working memory. The

nature of this load, and its implications for a curriculum design, are explained by cognitive load theory (Chandler & Sweller, 1991; Cooper, 1998; Paas et al., 2003; Sweller, 1994; Sweller et al., 1998).

Cognitive Load Theory and Sense-making from Curriculum

This theory develops from the information processing view of learning that learning takes place when information is encoded into the structures of long-term memory “in such a way that the knowledge and skills may be recalled and applied at a later time on demand” (Cooper, 1998, p. 4). Information is stored in long term memory in hierarchically organised networks or schema (Cooper, 1998; Nuthall, 2000) that become richer and more complex as new information is encoded and integrated into them. The critical issue, however, argued by cognitive load researchers and theorists is that before information can be encoded it “*must first be attended to, and processed by, working memory*” (Cooper, 1998, p. 4 – his emphasis) and that this processing capacity is limited by its ability to consciously attend to no more than 7 ± 2 elements of information simultaneously (Miller, 1956) or as few as two or three elements when the interactions between the new elements of information is high (Paas et al., 2003).

The notion of “conscious attention” is an important one here. Processing in working memory is guided by schema held in long-term memory (Nuthall, 2000). In the case of experts these structures are dense and expansive. They incorporate learned responses for multiple situations to the extent that experts can “carry out the required responses automatically, *without the need for high levels of concentration* [italics added]” (Cooper, 1998, p. 5). The high level of automaticity associated with expertise, therefore, effectively shortcuts the limited capacity of working memory. This has important implications for curriculum design. As the empirical work carried out by Spillane and Hill has shown, and as the New Zealand experience endorses, curriculum design is usually carried out by those who have had the benefit of many years of research and

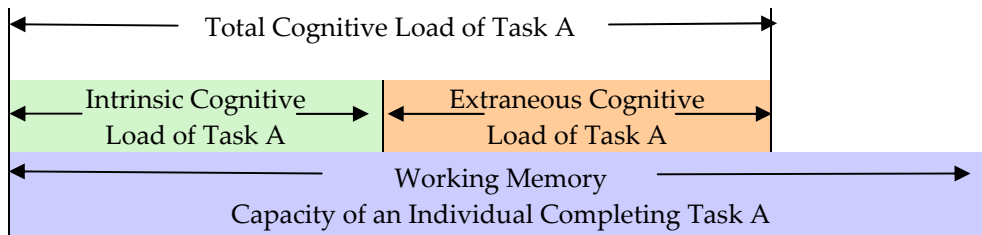
experience in the subject⁷. They are, at least in a curriculum sense, experts – their schema for the nuances of subject representation are inevitably more developed than for teachers, much less experienced in curriculum design, who have to read the curriculum. As such they may not recognise the load that the design is placing on those who have to make sense of it.

Cognitive load theory argues that there are two types of load – intrinsic and extraneous – and that the relationship between the sum of these loads and the working memory capacity of the individual completing the task influences their ability make sense of new information. Intrinsic cognitive load refers to the difficulty of the material being studied. It is a function of the quantum of new information (in relation to curriculum, the number of new ideas and content that the curriculum is introducing) and, more particularly, of the number of interacting elements that need to be considered simultaneously to make sense of the task (the relationships between the elements of the curriculum). Where the amount of new information is high and/or element interactivity is high, then the intrinsic cognitive load is high. Extraneous cognitive load refers to the load imposed by the way in which the task is presented to the reader. The extraneous cognitive load of a task is compounded when the reader has to mentally integrate two different sources of information, neither of which holds sufficient information to be understood without the other. The reader has to hold one of the sources in working memory while scanning the other to find corresponding information. The capacity of working memory is reduced, therefore, not by the content of the information but by the searching required between multiple, disconnected modes. This process is variously referred to as “representational holding” (Mayer & Moreno, 2003) or the “split attention effect” (Cooper, 1998; Sweller et al., 1998). In relation to sense-making from curriculum, therefore, if the design is such that meaning has to be gleaned by making reference to separate sources within the document, or to completely separate sources beyond it, the extraneous cognitive load is increased.

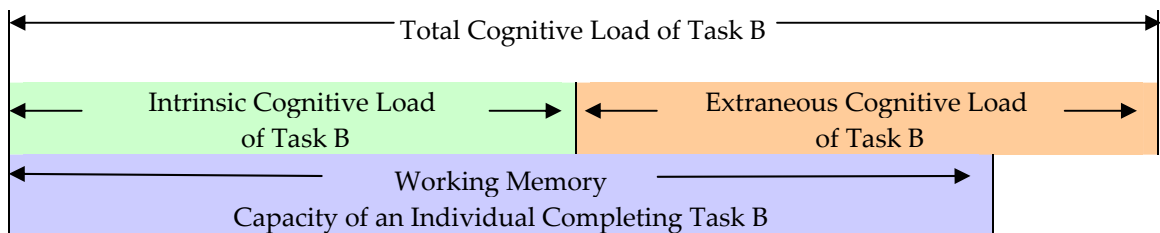
⁷ The final writing team for the 1997 social studies curriculum, for example, comprised four university-based and one college-of-education based teacher educator in social studies. Each had been involved in social studies as a teacher, researcher and teacher educator for more than 20 years. They had also all been involved in previous curriculum development in New Zealand social studies.

The various possible relationships between the elements of cognitive load and the working memory capacity (Cooper, 1998) of a hypothetical individual are illustrated in Figure 3. The relatively simple Task A poses few design challenges because the task introduces little new information and that which is introduced requires little integration (low intrinsic load). Task B, however, is more complex and this complexity places pressure on the presentation of the task. If this presentation is poor (high extraneous load) mental resources are unnecessarily shifted away from the deeper purposes of completing the task - i.e. schema acquisition and automation in long term memory (Paas et al., 2003) - to the search for connections in the presentation. This may lead to confusion and misunderstanding. The modified version of Task B shows how, by improving the design of the task, the overall load can be reduced to a point where new learning is possible.

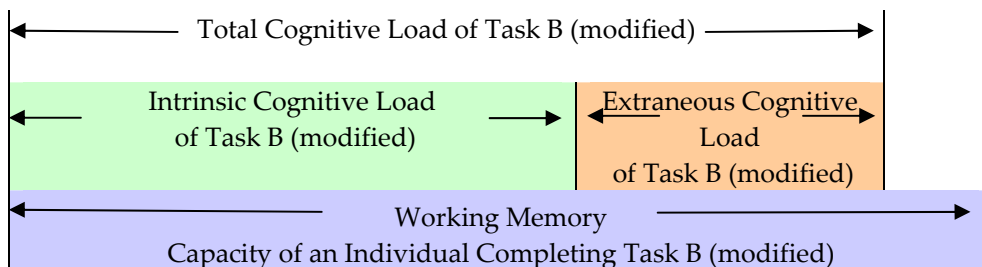
Figure 3 is a simplification because by illustrating the situation for one individual on a single task it assumes that working memory capacity is constant. In reality of course the capacity of working memory is a function of the presence and automaticity of task-relevant schema in long term memory (Bruning et al., 2004). As a consequence the capacity varies according to expertise from individual to individual and, for any one individual, from task to task.



Task A: The content of this task is relatively simple (low intrinsic load – few new ideas, little interaction between ideas). The way in which this task is presented does not cause the load to exceed the working memory capacity of the hypothetical individual undertaking the task.



Task B: The content of this task is more difficult. The intrinsic load is higher than in Task A (a higher level of new information and/or greater interaction between the elements of information). The way in which the task is presented (extraneous cognitive load) is also higher meaning that, overall, the working memory capacity of the hypothetical individual undertaking the task is exceeded. It is likely, therefore, that new learning will not occur for this individual.



Task B (modified): In this modified version of Task B the intrinsic load is, by definition, unchanged (the quantity of new information and/or the interactions between the elements of information remain constant) but the way in which this information is presented (in other words, the design of the task) has been modified. By modifying task design the extraneous cognitive load has been reduced to a level where new learning is now possible for this hypothetical individual.

Figure 3: The Relationship between Elements of Cognitive Load and Working Memory Capacity (based on Cooper, 1998, p. 8)

The potential for cognitive overload is a fundamental design challenge (Mayer & Moreno, 2003). From the point of view of the reader, cognitive load exists at the level it does *irrespective of whether its source is intrinsic or extrinsic*. However, from the point of view of the designer, the distinction between intrinsic cognitive load and extraneous cognitive load is significant because intrinsic cognitive load is fixed (tasks such as curriculum interpretation require the integration of multiple elements), whereas extraneous cognitive load can be addressed by design (Sweller et al., 1998). Clearly, where intrinsic cognitive load is low (a straightforward task with minimal interacting elements) then the design implications of extraneous cognitive load are insignificant. However, sense-making from curriculum, requiring as it does simultaneous interpretation of multiple interacting elements, is not such a task. Therefore, design becomes critical.

Although she does not draw on cognitive load theory, one of Hill's (2001) examples of curriculum interpretation illustrates the implications of this theory. Teachers were required to make sense of, and develop local standards from, the following set of state standards, all related to the mathematical concept of "pattern":

- recognise, describe, extend, analyse, construct and explain geometric patterns including transformations.
- develop and test generalisations based on observations of patterns and relationships.
- study patterns and functions to analyse, represent, and generalise functional relationships.
- state rules for patterns in oral and written form.

The intrinsic cognitive load of the interpretive task is high because teachers have to make multiple connections within and between the four elements to make distinctions between the separate terms. In so doing they have to clarify the meaning of unfamiliar terms (in some instances Hill reports that the group looked up dictionary definitions adding a further element of complication given the multiple and contrasting

definitions of terms that had both commonplace and specialist meanings); of like terms (“generalisations” and “patterns”); and of terms with everyday meanings that differed from the intention of the standards (“test”). They also had to decipher the difference between multiple instructional words such as “recognise”, “describe”, “extend”, “analyse”, “construct” and “explain”. They had to reconcile subtle distinctions to determine, for example, the difference between “explaining geometric patterns” and “developing generalisations based on observations of patterns”; between “generalising functional relationships” and “stating rules”. Hill reports that the teachers had great difficulty with this task and that they found the words overwhelming and difficult to understand. The intrinsic cognitive load of the task, demanding as it did so many connections but compounded by a high level of “representational holding” because so many of these connections needed to take place beyond the policy statement, was so high that understanding was compromised. Many of the tasks required of the teachers in interpreting these standards drew them away from acquiring new schema (i.e. understanding the core intent of the standards) because the resources of working memory were fully utilised deciphering the meaning of individual words and the relationships and distinctions between these words. Furthermore there was little in the layout (representation) of the four objectives that improved understanding. In other words, aside from numbering the objectives one to four nothing had been done to reduce the extraneous cognitive load of the interpretation task.

Cognitive load theory is not just helpful in understanding the reasons for potential confusion around the policy statements. It also suggests means of improving sense-making and schema acquisition by reducing extraneous cognitive load. In the literature this is referred to as germane or effective cognitive load (Paas et al., 2003).

Germane Cognitive Load – Strategies for Reducing Extraneous Cognitive Load in Written Materials

The strategies associated with the concept of germane cognitive load aim to free as much of the reader’s working memory as possible so that they can attend to the deeper meaning of the information (Cooper, 1998). There are four main ways of improving

sense-making on tasks such as curriculum interpretation where the intrinsic cognitive load associated with the task is high. Each of these has been demonstrated to have a positive effect on sense-making in instructional contexts. While they have not been applied directly to curriculum interpretation, given typical text-based format of curriculum presentation there is no reason to suppose that they would not impact in a similarly positive way on this form of sense-making.

The use of worked examples

This strategy has largely been tested on mathematically-based content but the principles inherent in the approach are consistent with the argument advanced by Spillane et al. (2002), Spillane (2004) and Hill (2001) that abstract principles need to be supported by examples which show how these principles might be enacted in practice. From a cognitive load perspective, what worked examples do is to shift mental resources away from solving the problem (working out what the pieces of the curriculum puzzle mean and how to put these pieces together into a coherent teaching plan) towards focus on the intentions and meanings behind the “solution” (what is this example showing us about the way this curriculum is encouraging students to be taught, and to learn). While the full expression of this approach is often worked out in curriculum support materials the inevitable physical separation of these materials from the policy means that at least some attention needs to be paid in the design of the policy to the use of specific worked examples.

Mixed mode instructional format

This approach to design is based on the finding that some portions of working memory are sensory-mode specific and that it is possible, therefore, to expand working memory by providing information in the multiple modes (Cooper, 1998). Mayer and Moreno (2003) depict working memory as being “dual-channelled”. One channel processes auditory/verbal information, the other processes visual or pictorial representations. Although both channels have limited capacity their combined capacity is greater than one or other channel on its own. The obvious implication for instructional, and curriculum, design is to ensure that written information is supported by visual representations especially where element interactivity is high and where the links

between elements can be illustrated diagrammatically. This solution, however, is only effective if it does not increase “representational holding” (Mayer & Moreno, 2003). If sense-making requires the reader to attend to both diagram and text because neither provides sufficient information on its own then the limited resources of working memory are overloaded by the search process at the expense of understanding.

The design solution to this, which has been demonstrated to enhance sense-making in many different instructional formats, is to integrate text and visual representation by placing text *within* the visual (Cooper, 1998; Mayer & Moreno, 2003). There are, however, some provisos. If the text or visual *alone* provide full meaning then, as Cooper (1998) explains, “only one source of instructions should be used ... and the other source, which is redundant, should be removed completely from the instructional materials” (Cooper, 1998, p. 15). The provision of both sources in these circumstances merely increases the demands of working memory and, therefore, reduces the capacity for deeper processing. In a similar way, visuals which are used as embellishment place an unnecessary “incidental processing” demand on working memory and divert capacity away from the essential processing required for understanding (Mayer & Moreno, 2003).

Text organisation and signalling

This approach refers to the provision of cues to help the reader integrate text elements and to reduce the mental effort required to search text and to hold information in memory (McCrudden et al., 2004). The three main types of cue are text contiguity, typographical signals and explicit signals (Morrison et al., 2004).

Text contiguity refers to the arrangement together of conceptually-related text segments. The effects of representational holding occur not only between text and diagram but also between sections of text that need to be connected by the reader but which are physically separated in the design. This “spatial contiguity” (Mayer & Moreno, 2003) effect is common in curriculum given that purposes, content, teaching

and learning approach, and assessment are often described in separate sections. The worked example and mixed mode formats described above work to reduce the extraneous cognitive load by physically integrating diverse elements showing either how they operate together in practice or how they are connected schematically. Text contiguity, while not always possible in a document as complex as curriculum, performs a similar function by positioning interrelated sections of text together. Consistent with their findings on the split-attention effect Chandler and Sweller (1991) found that when procedures and results were integrated in a research report, the time spent reading the report was less and the understanding of the report was greater than if these sections were presented separately. Likewise, multiple topic switches within a text (Schnotz, 1993) have been found to reduce understanding as cognitive resources shift from integration to decoding the semantic structure of the text.

Typographical signaling refers to the use of headings to signal levels of organisation, the use of “white space” and bullet points to signal groupings of like information, and typographical variations such as boldface, italics, type size or shading to signal important words or information. Hartley and Benjamin (1998) investigated the impact of such devices on the readability of abstracts in academic journals and found that although the use of headings and white-space increased the length of the abstracts they were judged by respondents to be significantly more accessible to the reader, more informative and more understandable than traditional abstracts. As Lorch and Lorch (1996) explain “headings... communicate the topic structure of the text, thus providing support for readers’ attempts to construct a representation of the topic structure” (p. 262). The high element interactivity that is typical of curriculum texts suggests that such signaling of global structures is likely to be an important means of enhancing understanding of curriculum design and intention.

Explicit signaling refers to the use of connectives i.e. pointer words (“there are two factors that need to be considered...”) which alert readers to what is to follow, and to words that explicitly state the relationships between the main elements within the text

(e.g. “by comparison...”, “, therefore...”, “consequently...” (Meyer, 1985). In the absence of such signals, text is likely to be decoded as a “temporally organised list of facts” (Lorch & Lorch, 1995, p. 538; Meyer & Poon, 2001). Explicit signals help the reader identify “superordinate text relations” (Meyer & Poon, 2001, p. 142) thereby helping the reader “understand the logical relationships among the main ideas in the text” (Meyer, 2003, p. 215) and enhancing the understanding of its conceptual structure. Significantly, in relation to Spillane’s finding that implementing agents attend to the superficial aspects of policy, the use of signals such as headings and connectives, when used to emphasise important concepts and relationships, have also been shown to shift recall of text *towards* those key concepts and away from less important information (Loman & Mayer, 1983; Mayer et al., 1984). As Loman and Mayer (1983) explain: “Signaling encourages the reader to build a coherent learning outcome containing causal links that will support transfer to new situations” (p. 410).

A critical element in the role of signaling in sense-making is the level of prior knowledge of the reader. Where a reader’s schema for new material is poorly developed, connectives are critical because without such linguistic cues, the reader is unable to make the explicit connections required (Kintsch, 1993). As Spillane’s work illustrates, implementing agents often lack schema for *new* curriculum material. On the other hand, Kintsch (1993) explains that where relevant schema are already well developed, less explicit signalling of text organisation maybe beneficial to understanding because the reader is forced to make their own inferences and to create a more flexible and sophisticated level of understanding. This finding further exemplifies the dissonance that Hill (2001) observed between those who design policy and those who interpret it. The designers have well developed schema for the material they are writing and thus see little need for explicit signalling, in fact often avoiding it so that “teachers can make their own connections”. The reader, on the other hand, with a less developed schema for the new material needs precisely the signals that had been omitted in order to make the meaning intended.

Although none of the approaches described above have been specifically tested in contexts that relate to the reading of curriculum, the variety of written contexts in which they have been trialled indicates that, taken together, spatial contiguity and signalling through the use of headings and connectives, have the potential to reduce extraneous cognitive load thus increasing the potential for readers to integrate the main elements of curriculum text and to understand it at the deeper level that researchers such as Spillane and Hill have observed is often missing.

Internal Policy Coherence

Internal policy coherence refers to the logical consistency between the various elements of the curriculum. Sense-making is enhanced when curriculum purposes, content, teaching and learning approach, and assessment are logically aligned. There are inherent difficulties, however, in achieving such coherence because curriculum design needs to balance the multiple competing pressures that typically influence design deliberations. There are many different classifications of the conceptions that underlie these competing pressures in the curriculum literature (for example, Eisner and Vallance, 1974; McNeill, 1996; Print, 1993). Their particular relevance to this thesis, however, is not so much the nature of these conceptions as the design tensions that arise from them. Burton et al. (2001) have depicted these tensions on a series of continua.

The “Student-Centred”-“Subject-Focused” Continuum

The “student-centred” or “developmental” model of curriculum places the student and their development at the centre of curriculum decision-making. One of the earliest expressions of this model can be found in the work of Kilpatrick (1918). For Kilpatrick the content that was important was the content that was real for students. He believed in learning without compulsion and that this could best be achieved by replicating the way people learned in daily life – through self-initiated, purposeful, group activity guided by a teacher. Thus for Kilpatrick there was no pre-set content nor

predetermined learning outcomes. Instead he proposed a curriculum design in which teachers guided students through four procedural phases – purposing, planning, executing and judging – where the purposes and content came from the students themselves. Integration of knowledge was central to the design. The concepts of scope and sequence played a minimal role. The developmental model today is much more strongly based in theoretical understandings of student development and learning (Herne, 2000) but it still holds to the central position of the child and to the rejection of the external imposition of knowledge and outcomes. As Kelly expresses it:

the starting point for educational planning is not a consideration of the nature of knowledge and/or the culture to be transmitted or a statement of ends to be achieved...but from a concern with the nature of the child and with his or her development as a human being (Kelly, 1999, p. 77).

The “subject-focused” model is organised around subject disciplines which define the scope and progression of learning. One of the most powerful expressions of this approach to curriculum design was that developed by Bruner (1960). Reporting on the deliberations of academic experts at the Woods Hole Conference, Bruner argued that curriculum needed to “present subject matter effectively – that is, with due regard not only for coverage but also for structure” (Bruner, 1960, p. 2). Structure was to be provided by the central ideas of the academic disciplines. For Bruner, and his colleagues at Woods Hole, “giving students an understanding of the fundamental structure of whatever subjects they choose to teach... is a minimum requirement for using knowledge and bringing it to bear on problems and events one encounters outside a classroom” (Bruner, 1960, p. 11). It was further claimed that this focus on structure enhanced the ability to generalize to novel situations, made the content more likely to motivate students (in other words the knowledge was usable, not inert), and reduced the forgetting that arises from the learning of disconnected sets of facts. Bruner and his colleagues were insistent that a logical implication of this approach was that curriculum design needed to involve academics as well as practical and educational expertise:

designing curricular in a way that reflects the basic structure of a field of knowledge requires the most fundamental understanding of that field.

It is a task that cannot be carried out without the active participation of the ablest scholars and scientists... working in conjunction with experienced teachers and students of child development. (p. 32)

The contrasts between the extremes of this continuum have been deliberately sharply drawn to illustrate the design tensions between the two approaches. In reality many curriculum designs sit somewhere between the polarities. It is possible, for example, to design a curriculum within the structure of an academic subject that permits a certain degree of student choice and autonomy. Nonetheless, there are elements of the two approaches that are mutually exclusive. The fundamental position that curriculum should be designed by academic experts is incompatible with the notion of students as curriculum designers. Any attempt, therefore, to mix these two extremes in a curriculum design has the potential to create contradiction and confusion unless it is handled with great care. As Spillane's work shows, the dominant schema of the implementing agent will draw them to notice the approach that resonates most strongly with their own background thus losing any value that the other approach might hold. A teacher, for example, with a humanistic orientation who approaches a curriculum design that attempts to include both discipline structures and student choice is likely to ensure that student choice guides content selection rather than the discipline structures because this is what they will notice, and be familiar with, in the text. The common misunderstanding that Dewey was responsible for the rise of child-centred progressive education at the expense of subject matter illustrates this same point. Those who make such a claim (for example, Hirsch, 1987, 1996; Phillips, 1998) read Dewey selectively, consistent with their own schema about teaching and learning (Petrovic, 1998). Dewey does claim a central position for the experience of the child but he is also clear that organised subject matter has a significant role in the child's development:

as two points define a straight line, so the present standpoint of the child and the facts and truths of study define instruction. It is continuous reconstruction, moving from the child's present experience out into that recognized by the organised bodies of truth that we call studies. (Dewey, 1902, p. 11)

That critics of Dewey have missed this point illustrates the difficulty of integrating two potentially competing perceptions of curriculum, in spite of Dewey's extensive expression of the manner of integration.

The Process-Content Continuum

The rationale behind the curriculum as process is the need to prepare students well for the future by helping them develop a set of skills that can be used flexibly in novel situations. The most extreme expressions of this approach argue that knowledge is ephemeral but that skills endure and that it is skills, therefore, that should be foregrounded rather than content. The pure discovery pedagogy whereby students are free to work in groups with little or no teacher guidance is a similar expression of the prioritization of process over content (Mayer, 2004).

Not all versions of the process approach are this extreme. Bruner (1960), for example, argued that students should come to understand the structure of subjects, not by being told but by a process of "discovery" involving question-posing, information search, hypothesis development and reflection. Stenhouse (1975), one of the most significant contributors to the idea of curriculum as process, argued that while "principles of procedure" (that is, teaching and learning processes) should be foregrounded these principles needed to be developed alongside important concepts that are the "focus of speculation" within a subject (p. 85).

The content approach to curriculum prioritizes knowledge over skills. Its most extreme current form is found in the *Core Knowledge* curriculum based on the work of Hirsch (1987, 1996). This curriculum develops from the proposition that ability to learn is highly correlated with general knowledge and that this knowledge, by its overview nature, provides the optimum access to deeper knowledge (Hirsch, 2001). In other words, that ability to learn is knowledge, not skill, related. The *Core Knowledge* curriculum is highly specific, strongly sequenced and supported by a factually-rich textbook series.

A more widespread application of the content approach is the organization of curriculum around important concepts. This was the basis of Bruner's structure-of-the-discipline approach and was also central to Taba's influential approach to curriculum development in social studies. In recognising both the potential obsolescence of much specific content and the impossibility and undesirability of complete content coverage within topics, Taba sought to provide a focus for the selection of content by way of important ideas:

When content is viewed exclusively as an assemblage of information there is no criterion to distinguish the relevant from the irrelevant material. Hence all facts and information seem to have the same significance. For this reason there always seems to be too much to cover... [however], if the content fields are viewed not as treasures of knowledge to be transmitted but as a way of understanding a limited number of basic ideas, the problem of scope acquires a different meaning. One does not ask, for example, what array of particular...facts could be packed into students, but what basic ideas need to be clearly understood...Only after basic ideas are determined does the question emerge as to what specific facts are necessary... (Taba, 1962, p. 186-187)

Bruner's (1960) spiral curriculum reinforced this view with his argument that students needed repeated exposure to the key ideas of the disciplines. After many years of detailed research in New Zealand classrooms, Nuthall (2004a) came to a similar conclusion when he argued that what was most needed to enhance student learning success in the classroom was for teachers to select the most important ideas and concepts in a learning area and to spend more time gaining insight into developing student understandings of these ideas and concepts. Important ideas, therefore, are not just organisationally appealing; they are cognitively significant as well.

While the differences between process and content have once again been sharply drawn here, the work of Bruner, Taba and Stenhouse illustrates that except in extreme expressions of the two approaches, differences may be more a matter of emphasis. Even so, from a design point of view there exists a fundamental tension based on this very point. The process approach, commonly based on a form of enquiry, develops learning around questions. The content approach answers questions that have not

necessarily been asked by the student, or the teacher. As Wiggins and McTighe (1998) put it:

The key to understanding by design is to cause rethinking through appropriate enquiry and performance. That work requires a very different curriculum design than the typical scope and sequence of a march through answers, with those expert answers unmoored from the questions that gave rise to them in the first place. (p. 32)

The process – content continuum, therefore, is not simply a matter of emphasis for the teacher to sort out – it is a fundamental issue of design coherence. Furthermore, even if content becomes the more dominant organizing device the distinction between content as the accumulation of facts (general knowledge) and content as the development of conceptual understandings needs to be carefully drawn. One approach supports a form of design that lists what needs to be learned, the other requires a much more sophisticated approach that justifies the selection of concepts and establishes progressions of learning based around these concepts.

The Open-Ended – Target-Driven Continuum

The open-ended approach to curriculum clearly resonates with the child-centred and process approaches discussed above. Stenhouse (1975) argued that content should be selected not to satisfy the achievement of a predetermined goal but rather “to exemplify the most important procedures, the key concepts and the areas and situations in which the criteria hold” (p. 85). Such learning is speculative and defies the prior prescription of content to be mastered. What Stenhouse was seeking to define was teacher activity (i.e. the way in which the teacher should encourage the student to learn) rather than student outcome. Curriculum design, therefore, focused on the principles of pedagogy and the type of content (for example, the “controversial issues” in Stenhouse’s *Humanities Project*) to which this pedagogy should be applied. Thus, for Stenhouse, curriculum design supported teacher development because “there can be no educational development without teacher development; and the best means of development is not by clarifying ends but by criticising practice” (p. 83).

Stenhouse's approach sits in stark contrast to the target-driven, objectives approach to curriculum design that developed from the initial work of Tyler (1949). For Tyler, curriculum was goal-orientated with content selection, instructional process and assessment being determined by learning objectives. As Tyler explained "the purpose of a statement of objectives is to indicate the kinds of changes in the student to be brought about so that instructional activities can be planned and developed in a way likely to obtain these objectives" (p. 45). These objectives became the basis for curriculum alignment or, as Taba (1962) explains, the "guide (for) making... curriculum decisions on what to cover, what to emphasise, what content to select, and which learning experiences to stress" (p. 197). Later and subsequently much-used work by Bloom et al. (1956) suggested a basis for the progression of learning based on objectives.

The open-ended and target-driven approaches to curriculum design are more oppositional than the extremes represented by the previously discussed continua. Whereas one approach foregrounds the need to develop the experience and judgment of the teacher; the other foregrounds the need to bring about pre-specified behavioural changes in the student. Whereas one sets no specific goal for student performance; the other ties this down to particular behaviours. Kelly (1999) claims that from a coherence point of view it is unhelpful for curriculum design to attempt to find a middle ground between these polarities:

To offer educational and curricular prescriptions which do not clarify which of these two approaches they are recommending, or which, worse...offer a mishmash of the two, is to do the opposite of 'contributing to the search for greater clarity and definition' in relation to the curriculum debate and, more seriously to deny teachers the advantages of clear advice and a conceptually sound base for the realities of their practice. Teaching is of itself a complex activity, so that teachers should be excused the added complexities of having to cope with incoherent sets of guidelines. (Kelly, 1999, p. 82)

In their discussion of the continua discussed here Burton et al. (2001) draw a similar conclusion. While noting that not all points of the continua are mutually exclusive

they conclude that “the more influences that the curriculum has been encouraged to satisfy the more complicated (or possibly even confused) the vision will be” (p. 21).

Achieving Coherent Design

As the discussion of cognitive load has already illustrated, complication compounds sense-making unless it is accompanied by careful and coherent design. There are models of such designs. The *New Basics* curriculum project in Queensland (The State of Queensland, 2004), for example, has placed a premium on developing a design that maximizes alignment between potentially competing elements of the curriculum. As the project research report explains:

at the heart of the New Basics is the idea that, to get the right things happening in classrooms, there must be an alignment of curriculum, pedagogy and assessment. And the alignment of these three must be in practices, not merely in statements of intention or expectations. (p. 2)

Thus a set of trans-disciplinary curriculum organisers was developed, supported by a pedagogy that emphasised the connectedness of knowledge, and by performance assessments that required integration of knowledge and skills. The difficult tension between open-ended, student-centred learning and outcomes was carefully resolved by developing criteria for assessing performance on “rich tasks”. These tasks retained the process of enquiry into issues relevant to students alongside prescriptions of the characteristics of high quality and acceptable performance on these tasks. Thus outcomes were able to be reported but the narrower pre-determined behavioural focus was avoided.

The Importance of Coherence

The influence of alignment or coherence on sense-making has been well recognised in other settings. In the field of teacher professional development, Newmann et al. (2001) explain that programme coherence – that is, a programme guided by a common framework over a sustained period of time – is more likely to enhance student achievement than disconnected initiatives. In the classroom context, Berliner (1987)

has argued that alignment of intention and instruction is critical to the effective use of time and to consequent student achievement. In the curriculum field itself, Goodlad and Su (1992) suggest that the ultimate integration in the mind of a learner is aided by integration of curriculum components such that they are mutually reinforcing in design. Also in curriculum, Clark (2004) is scathing about the impact of the incoherent philosophy of “rigorous eclecticism” on the development of the New Zealand curriculum. He writes:

‘Rigorous eclecticism’ should be seen for what it really is: a downright naïve and shoddy attempt to give some philosophical respectability to the philosophically indefensible... it is one thing to concoct a fine-sounding name, it is quite another to have any philosophical respectability or practical application. (p. 135)

The essential point is that coherence assists sense-making. This is not to argue that different perspectives cannot be accommodated within curriculum, rather that there needs to be a distinction drawn between perspectives that are competing but complementary and those that are contradictory. As Haig (2004) explains, in the context of research evidence, where disconfirming examples and inconsistencies are complementary with general findings the possibility of integration exists but where they are contradictory no such possibility exists. If elements of contradiction create confusion then no manner of design devices will improve coherence and sense-making.

Design Criteria: Implications of the Process of Sense-making for Curriculum

Design

The two chapters in this Part of the thesis have examined the process of sense-making in curriculum implementation. In acknowledging that sense-making arises from the interaction of multiple influences it has sought to establish the implications of these influences for the design of curriculum. Six major implications have emerged. They are expressed below as criteria by which to appraise curriculum design.

Design Criterion One - Effective curriculum design clearly communicates the rationale for the curriculum to enhance sense-making about the underlying principles and to reduce the inclination by implementing agents to attend primarily to surface features which are consistent with the current schema.

Design Criterion Two - Effective curriculum design is alert to possible misconceptions about underlying intentions. Wiggins and McTighe (1998) illustrate one means of operationalising this by integrating “misconception alerts” in the body of the curriculum policy text.

Design Criterion Three - Effective curriculum design connects principles and examples to clarify meanings of both specialist and general instructional language, to reduce misunderstandings, and to enhance schema acquisition of curriculum intentions. The examples need to be specific and carry the intentions of the curriculum. To avoid extraneous cognitive load associated with excessive representational holding these examples also need to be spatially contiguous with the principles they illustrate, not located in a separate section of the policy, or in a separate manual.

Design Criterion Four - Effective curriculum design uses graphics to enhance processing of the interacting elements of the curriculum. These graphics need to embed meaning rather than requiring the reader to make sense of them from the text. Graphics for embellishment, or that replicate text, should be avoided to reduce extraneous cognitive load on working memory.

Design Criterion Five - Effective curriculum design uses logical text organization and signaling devices such as headings and connectives to reduce the search and storage demands on working memory and to make the logical connections between the elements of the curriculum more explicit.

Design Criterion Six - Effective curriculum design maximizes internal coherence, and minimizes complexity, by not mixing contradictory design and by careful and explicit alignment of any potentially competing elements.

Part Two of this thesis draws on these criteria to analyse the design of New Zealand social studies curricula. They are also used in Part Three to guide the future design of a proposed essence statement and structure for New Zealand social studies.

**PART TWO: NEW ZEALAND SOCIAL STUDIES CURRICULUM DESIGN
1942-1997 AND ITS IMPLICATIONS FOR SENSE-MAKING**

CHAPTER 3

Approach to the Analysis of Curriculum Design

Social studies was introduced to New Zealand schools in 1944. This first national curriculum, based on the recommendations of the 1942 *Thomas Report* (Department of Education, 1959), was restricted to junior secondary school (Year 9 and 10). Primary schools had to wait until 1961 before a social studies design was developed for Years 1 to 8 (Department of Education, 1961)⁸. In 1977, after more than ten years of consultation and review, the curriculum developed by the *Thomas Report* was replaced by a much modified design (Department of Education, 1977). This design extended into the senior primary school (Years 7 and 8) but the 1961 syllabus remained in place for junior primary school. It was not until 1997 that the first design was developed covering all levels of schooling (Ministry of Education, 1997). This curriculum statement, developed as part of a major redevelopment of the New Zealand curriculum (Ministry of Education, 1992), was gazetted for implementation in 2000. It was also accompanied by the release of a Maori version of the curriculum (Ministry of Education, 2000). Both the English and Maori documents for the first time officially extended social studies to Year 13. The coverage of these official expressions of national social studies curriculum is summarized in Figure 4.

⁸ In 1948 the syllabus for primary schools included reference to social studies but it was stated as “social studies *in* history and geography” and cannot, therefore, be regarded as the first official expression of a social studies curriculum in the primary school (Barr et al., 1997).

| | 1940 | 1950 | 1960 | 1970 | 1980 | 1990 | 2000 |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Senior Secondary School (Years 11-13) | | | | | | | <div style="border: 1px solid black; padding: 5px; text-align: center;"> <i>Social Studies in the New Zealand Curriculum, 1997</i> Implemented 2000 <i>Tikanga-a-Iwi, 2000</i> Implemented 2002 </div> |
| Junior Secondary School (Years 9-10) | <div style="border: 1px solid black; padding: 5px;"> <i>Thomas Report, 1942</i> Implemented 1944 </div> | | | <div style="border: 1px solid black; padding: 5px;"> <i>Social Studies Syllabus Guidelines Form 1-4, 1977</i> Implemented 1978 </div> | | | |
| Senior Primary School (Years 7-8) | <div style="border: 1px solid black; padding: 5px;"> <i>Social Studies in the Primary School 1961</i> Implemented 1962 </div> | | <div style="border: 1px solid black; padding: 5px;"> <i>Social Studies Syllabus Guidelines Form 1-4, 1977</i> Implemented 1978 </div> | | | | |
| Junior and Middle Primary School (Years 1-6) | <div style="border: 1px solid black; padding: 5px;"> <i>Social Studies in the Primary School 1961</i> Implemented 1962 </div> | | | | | | |

Note – for simplification purposes, throughout this thesis the curriculum documents are referred to by their date of publication rather than their date of implementation – i.e. the 1942 curriculum, the 1961 curriculum, the 1977 curriculum, and the 1997 curriculum.

Figure 4: Timeline of New Zealand Social Studies Curriculum Coverage by Level of Schooling

The curriculum statements have been accompanied by varying levels of supporting documentation. Reflecting Director-General Beeby's reluctance to impose reform on teachers, the Department of Education played a very restricted role in promoting the recommendations of the *Thomas Report* (Shuker, 1992). In fact copies of the report itself were not widely available until it was reprinted in 1959 and only two national refresher courses (in 1945 and 1959) were sponsored by the Department. The 1961 statement was afforded considerably more official support in the form of newsletters (titled "FACES" 1-7) and handbooks (Department of Education, 1971, 1978, 1980, 1986). The support for the 1977 statement both preceded and followed its release. Newsletters kept teachers informed of the process of development and of the teaching approaches that the new syllabus was about to encourage so that by the time of its release the syllabus was actually the eleventh newsletter. The syllabus itself was followed soon after by a further implementation newsletter. More than ten years later the Ministry of Education published a handbook (Ministry of Education, 1991) that substantially reorganized the 1977 syllabus but retained its basic intentions. The 1997 curriculum was supported by a programme of professional development for teachers, a handbook (Ministry of Education, 1998) and a video kit (Ministry of Education, 1999).

This chapter examines patterns and trends in the design of the New Zealand social studies curriculum from 1942 to 1997. In so doing it adopts the definition of curriculum design outlined in the Introduction to this thesis – namely, *the way in which purposes, content, teaching and learning approaches, and assessment are arranged and expressed in formal written policy statements of learning intentions mandated by central government*. This is a narrower definition than that used by curriculum researchers such as Spillane and Hill who regarded policy as incorporating both the curriculum standards *and* the accompanying professional support. The reason for the restriction here is that it is only the official policy statements for which New Zealand teachers are held accountable. The resources described in the previous paragraphs were all "supporting" rather than "mandated". The best example of this distinction is the *Form 3 and 4 Social Studies Handbook* (Ministry of Education, 1991). At first glance this handbook appears to rewrite the 1977 syllabus and to offer, through its release by the

Ministry of Education, an alternative, new version of the curriculum. The Ministry of Education, however, made it very clear that, despite appearances, this was not the case. In the *Foreword* the Ministry manager responsible for the handbook development project explained that the handbook was “intended to help teachers implement the syllabus” (Ministry of Education, 1991, p. 1). As the writer of the handbook I was also under no illusions that this was anything more than an attempt to clarify the official curriculum and to update it to reflect changes in society that had taken place since 1977.

The analysis that follows, therefore, focuses on the official expression of national social studies curriculum policy with the supporting documents only referred to where they help to shed light on this policy. This chapter also does not consider in any substantive way the Maori version of the 1997 curriculum. This is not to devalue the Maori version as an official expression of the social studies curriculum but rather to acknowledge that the translation demands (the document is 143 pages) are substantial, and that, even if such translation were undertaken, the subtleties of meaning that would have been lost would have diminished and compromised the analysis. It is to be hoped that others more knowledgeable in *te reo* and in *tikanga*⁹ than this writer will undertake analysis of this curriculum in the future.

Method of Analysis

The research questions that guided the analysis of the 1942, 1961, 1977 and 1997 curriculum statements were:

- What design patterns are evident in these documents?
- What have been the implications of these patterns for sense-making?

⁹ *Te reo* means the (Maori) language; *tikanga* means customs and traditions.

These questions were investigated using discourse analysis. Although this method encompasses a wide range of approaches, from those informed by critical theory through to quantitative forms of content analyses that summarise discourse using descriptive statistics, all are characterised by the repeated reading of texts to search for patterns and to infer possible consequences (Horsfall & Cleary, 2000). At the heart of this search for patterns is the question of pre-specified structure.

At one extreme the research questions, the design structure and the data unfold as the empirical work proceeds – an inductive, *a posteriori* approach (Punch, 1998). In its purest expression, this approach assumes that data collection is value-free and that patterns are “discovered, developed and provisionally verified” (Strauss & Corbin, 1998, p. 23) as the data collection and analysis proceeds. Such an approach is justified on the basis that social processes are “too complex, too relative, too elusive, or too exotic to be approached with explicit conceptual frames...” (Miles & Huberman, 1994, p. 17).

At the other extreme, the research questions, design and data are specified and structured in advance of the empirical work on the basis of hypotheses or theory – a deductive, *a priori* design (Punch, 1998). Popper (1991b), a strong critic of induction, argues that “all knowledge goes back to innate knowledge and to its modification” (p. 54). In other words there is always something before perception. As far as the research process is concerned all observation is preceded “by problems and attempts to solve them through hypotheses, theories, or conjectures” (Popper, 1991a, p. 33). Thus problems do not emerge from empirical data collection; they determine the data collection.

There is a danger in overemphasising these methodological distinctions. Peshkin (2000), for example, in a retrospective on his own commitment to inductive, qualitative research acknowledged that as much as he saw himself as “truly open to learning” this could not really be the case because as soon as he named his study the interpretation

had begun – in a sense the problem had been set. This conceptualisation, and experience from previous research, influenced where he looked, the judgments he made about what to collect, and his selection of what to write up. Consistent with the principles of induction this conceptualisation remained mutable and subject to modification along the way but the journey itself was an “assumption-laden, judgment-driven course” of interpretation. Such comments support Hammersley's (1992) view that the inductive-deductive extremes may better be viewed as positions on a continuum rather than polar opposites. On such a continuum the research reported in this chapter is more aligned to the pre-specified (deductive) than to the unfolding (inductive) structure of inquiry (Punch, 1998). It is built on Popper's view that all research begins with a problem situation (in this case the generally poor perception and implementation record of social studies) and that the external world (in this case, the curriculum design represented by the official curriculum documents in the subject) is the source of data for developing a better but still conjectural understanding of this problem. The research also proceeds from the predetermined definition of design set out in the Introduction and from a sense-making theory of implementation that informed the development of a set of recommendations for appraising design. As such, the thesis has already established an *a priori* framework for reading the documents. The first phase of reading was influenced by the definitional aspect of this framework; the second, by its evaluative dimension.

Defining and Classifying Curriculum Elements

The documents were read and each statement in the text was coded, using text annotation, according to the element of curriculum design that it represented. The definitions that formed the basis of this coding are described below.

Purpose

Any statement that stated or explained:

- what the subject was
- why it was important

- the aims of the subject
- the general outcomes anticipated for students. The term “general outcomes” refers to those that apply across *all levels* of the curriculum as distinct from level-specific outcomes that are more particular about the content of learning and are, therefore, more relevant to the content selection element below. General outcomes are also sometimes difficult to define. The 1942 curriculum in particular referred to what the subject should “show” students rather than what students should “learn”. In other words, it was expressed as a teaching goal rather than a learning outcome. It was nonetheless classified here as a general outcome because of the implied learning intent.

Content selection

Any statement that stated or explained:

- how teachers were to determine what to teach
- how teachers were to distinguish between the content requirements of the different levels of schooling covered by the document.

In this sense content was defined more broadly than the conventional definition of “prescribed studies”.

Teaching and learning approaches

Any statement that stated or explained:

- how teachers should teach the subject to students
- the type of learning that students should experience

Assessment

Any statement that stated or explained:

- how student progress, at any stage of the learning process, was to be monitored
- how teachers were to determine whether the intentions of the curriculum had been achieved.

There was no particular limitation set on the length of the statements that were coded. The data collection process was aiming to find “meaning chunks” (Edwards & Ogden, 1998). The expectation was that these would most commonly be expressed as sentences or sequences of sentences but the coding was open to the possibility of different meanings being found within one sentence or mixed within a sequence of sentences. Examples of meaning chunks and their coding by curriculum element are reproduced in Figure 5.

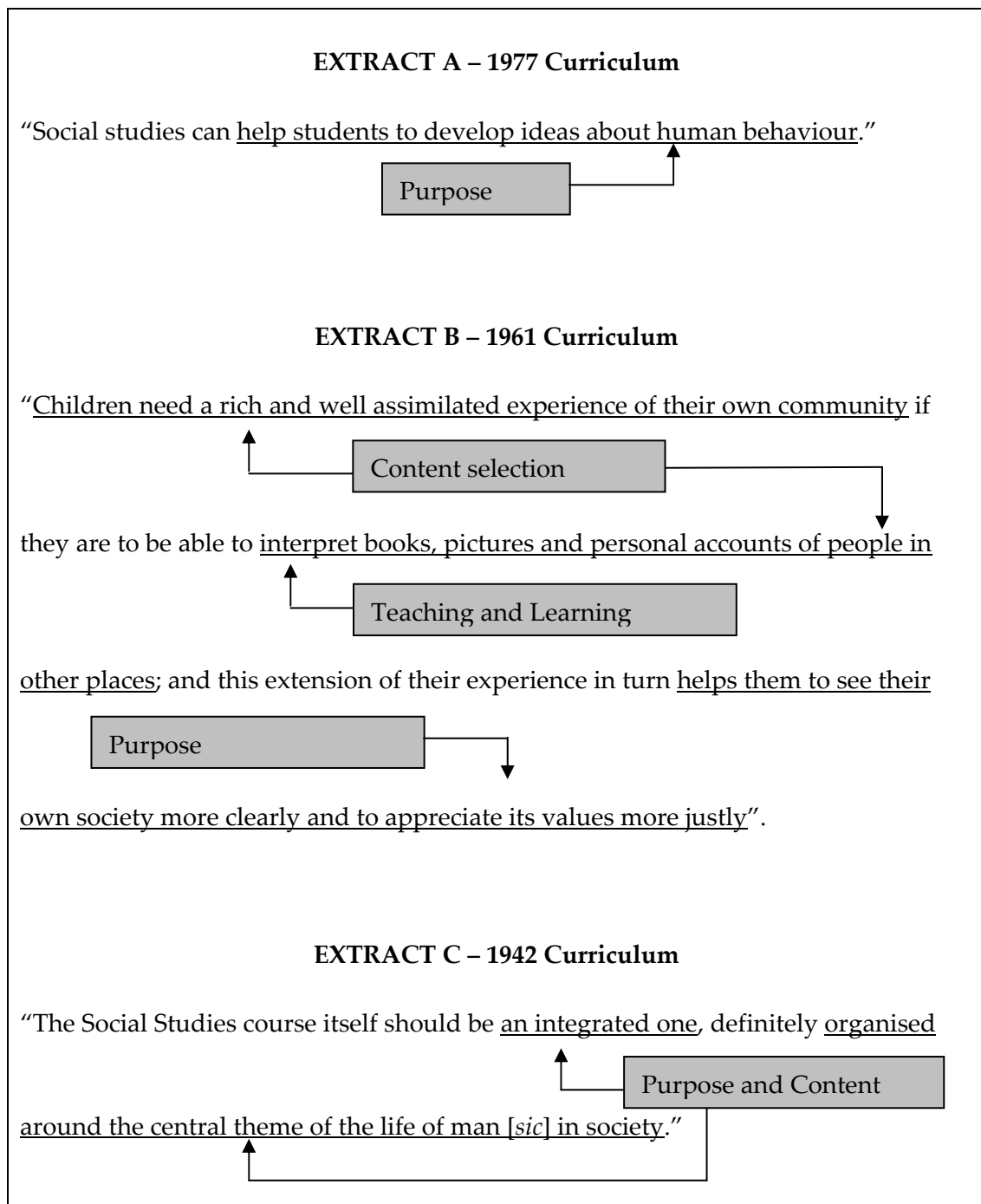


Figure 5: Examples of 'Meaning Chunks' and Coding

The first extract illustrates an example where a single meaning – the *purpose* of the curriculum - is contained within one sentence. The second extract illustrates a sentence that contains multiple meanings with references to *content selection* (drawn from the students' own community and from studies of people in other places), *teaching and*

learning approach (interpretation of resources), and *purpose* (understanding own society and its values). The third extract is more complex. The statement that the curriculum should be “integrated” is both a statement of *purpose* (to bring together knowledge from a range of social science disciplines) and *content selection* (to access multiple disciplinary sources). Likewise the organisation of the subject around the “life of man [sic]” implies both *purpose* (developing understanding) and *content selection* (the “life of man” as an organising constraint). In this case the content of this sentence was coded against both categories.

While it is common practice to verify the coding of text such as that illustrated in Figure 5 through reliability checks by other coders it was decided in this thesis not to adopt this convention. The decision was made on the basis that the classification was not inductively derived – in other words the classification categories themselves were pre-set and therefore not in contention - and on the basis that the *particulars* of classification were less important than the *patterns of meaning* that emerged from the analysis of the curriculum texts. In other words, it was not critical to the argument about curriculum intention whether “interpret books, pictures and personal accounts of people in other places” was classified as a “Purpose” or as “Teaching and Learning Approach”. What was critical was that this particular curriculum intention, however it was classified, formed part of the curriculum. The classification process was nonetheless important in identifying key curriculum elements. Therefore, in order to provide transparency for the reader the classification of Purpose statements has been included in an Appendix (Appendix B, p. 261) and other coded curriculum elements are cited in the text where they are being used to illustrate an argument.

Evaluating the Curriculum Elements and their Expression in Design

The definitional phase of data processing provided the basis for the evaluative dimension that is central to the sense-making focus of this research. As the first section of this thesis explained, significant challenges to sense-making are posed when new policy shifts the meanings and intention; and when the policy itself is complex or

incoherent or both. In order to determine the extent to which these challenges have been evident within New Zealand social studies curriculum two processes were followed using the initial classification of curriculum elements – the first was designed to track shifts in meaning and intention and their representation in design; the second to establish levels of coherence and complexity.

Tracking Shifts in Meaning and Intention and their Representation in Design

Once the initial coding process was completed, the data within the *purpose* element were further classified into general categories to reveal the main “meanings” attributed to social studies over the four curriculum documents. This was primarily an inductive process where common phrases and ideas were grouped and given a summary title. This process was inevitably influenced by the considerable existing literature on conceptions of social studies (for example, Barr, Barth & Shermis, 1977; Barr, Graham, Hunter, Keown & McGee, 1997; Brubaker et al., 1977; Hill, 1994; Janzen, 1995) but knowing that much of this work was developed in a North American context, these influences were kept in the background as much as possible.

The results of this first stage of data processing are recorded as a data table in Appendix B, p. 261. This table records the meaning chunks that relate to curriculum purpose and their classification within that element. For example, the purpose statement from the 1942 curriculum - “...an integrated (course), definitely organised around the central theme of the life of man [*sic*] in society” - was classified as relating to the general purpose of “Social Studies as knowledge and understanding about society”. The purpose-related meaning chunk from the 1977 curriculum - “Social studies should help students and teachers make decisions about participation in a changing society” – was classified as reflecting the general purpose of social studies as “Citizenship education through the development of participatory skills”.

This classification process established a structural framework summarising the multiple meanings attributed to social studies in New Zealand over the last sixty years.

The key dimensions of this framework are summarised in Table 1. The table shows that there have been five dominant themes but that, within those themes, there have been differing emphases. The simple process of tallying the number of purpose statements in each category was then used to highlight shifts in meaning and intention that have occurred in New Zealand social studies across the four official expressions of New Zealand social studies curriculum.

Table 1: The Purposes of New Zealand Social Studies as Described in Four New Zealand Curriculum Documents

| Purposes of Social Studies Classification Based on Appendix B (p. 261). | | Number of "meaning chunks" | | | |
|----------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------|------|------|------|
| | | 1942 | 1961 | 1977 | 1997 |
| To develop knowledge and understanding about ... | Society | 1 | - | - | 4 |
| | Human Behaviour | - | - | 2 | 1 |
| | How People Live | 2 | 5 | 2 | 6 |
| | New Zealand and New Zealand Society | - | 1 | 1 | 8 |
| | Wider World | 2 | 4 | - | 4 |
| As citizenship education through ... | Knowledge of contribution, duties and responsibilities | 2 | 1 | 1 | 1 |
| | Development of participatory skills | 2 | 2 | 4 | 6 |
| | Actual participation | 1 | - | 1 | - |
| | Development of commitment to social justice | - | - | 1 | 1 |
| As the development of life-skills through ... | Development of self-awareness and personal values | 1 | 2 | 9 | - |
| | Development of the ability to interact and communicate with others | - | 2 | 2 | 1 |
| As the development of the process of ... | Inquiry | 3 | 1 | 3 | 5 |
| | Values analysis | - | 1 | 3 | 4 |
| | Social problem-solving | 1 | 1 | 2 | 2 |
| As an integrating social science. | | 1 | - | - | 1 |
| TOTAL MEANING CHUNKS | | 16 | 20 | 29 | 44 |

Shifts in meaning and intention are not confined to the explicit expression of curriculum purpose. They can also occur in the expression of other curriculum elements. In order to identify these shifts, the annotated texts were re-read to identify any other major changes in meaning between documents. While there are inevitable shifts in detail, what this re-reading was seeking to establish was whether there had been any *significant change in strongly consolidated understandings* because it was these that, from the perspective of schema theory, were likely to be most obdurate. Such understandings were defined as *those that had been part of social studies across more than one curriculum document but that were substantially changed in a subsequent document*. Based on this definition one further significant shift in meaning, beyond shifts in intention and purpose, was identified. The nature of progression within social studies was substantially redefined between the 1942, 1961 and 1977 curriculum documents where progression was established through the provision of suggested *topics at each year level*, and the 1997 curriculum where progression was established by *outcome at pre-determined achievement levels*.

The shifts in the nature and purpose of social studies summarised in Table 1 and the shift in the curriculum interpretation of progression foreshadow a sense-making challenge because they require implementing agents to change a significant aspect of their schema for social studies. The mere presence of shifts in meaning, however, does not necessarily imply a sense-making problem. What is critical from a sense-making perspective is the *way in which these changes have been signalled and represented in policy*. The design criteria developed in Part One of this thesis established the importance of a clear and explicit curriculum rationale that anticipated assumptions arising from previous understandings and alerted implementing agents to shifts in meaning not just at the level of abstraction but also at the level of implementation detail specific, aligned and integrated examples. In order, therefore, to understand the sense-making implications of the identified policy shifts, each shift was analysed in relation to the design criteria established in Part One (p. 62) of this thesis, namely:

- the extent to which the curriculum rationale and, in particular, the rationale for change was clearly communicated to enhance sense-making about the underlying principles and to reduce the inclination by implementing agents to attend primarily to surface features which are consistent with the current schema (Design Criterion One);
- the extent to which the curriculum design alerted implementing agents to possible misconceptions about underlying intentions (Design Criterion Two);
- the extent to which the curriculum design connected principles and examples to enhance schema acquisition of new curriculum intentions (Design Criterion Three).

In other words, the focus of this analysis was on the extent to which each curriculum design made it possible for implementing agents to recognize that there had been significant shifts in meaning. The results of the analysis are reported in Chapter 4.

Establishing Levels of Coherence and Complexity

Unlike the inductive search for shifts in meaning between curriculum designs the search for patterns of coherence and complexity proceeded deductively. This was a necessary change in approach because such characteristics do not so much emerge from design as they are inherent within it. Furthermore, because of their essentially cognitive nature they can only be uncovered either empirically or against theoretically and research-derived criteria sourced in the literature on cognition. Given the historical context of this thesis, an empirical approach to design interpretation was not adopted. While such an approach clearly has value in understanding the extent to which teachers find curriculum coherent or complex, the preoccupation of most teachers with the present and the immediate (Openshaw, 2004a) would necessarily have restricted the analysis of coherence and complexity to the current curriculum. By using the theoretically and research-derived criteria established earlier in this thesis it was possible to establish a consistent basis of analysis against which each of historic curriculum documents could be analysed.

Each coded curriculum text was re-read multiple times and the design elements were evaluated for their internal alignment (coherence) and their spatial arrangement and expression within the curriculum text (complexity). This search for patterns was guided by the following design criteria:

- the extent to which the designs aligned principles and examples (coherence) and avoided extraneous cognitive load by locating principles and examples together spatially (complexity) (Design Criterion 3);
- the extent to which the design used graphics that were aligned with the content of the text (coherence) and that embedded meaning (complexity) (Design Criterion 4);
- the extent to which the design used logical text organization and signaling devices such as headings and connectives to reduce the search and storage demands on working memory (complexity) and to make the logical connections between the elements of the curriculum more explicit (coherence) (Design Criterion 5);
- the extent to which the design maximized internal coherence, and minimizes complexity, by not mixing contradictory design and by careful and explicit alignment of any potentially competing elements (Design Criterion 6).

In essence the *coherence analysis* sought to determine the extent of internal alignment within the documents between purposes, between purposes and content selection, between text and graphics, between approaches to design, and between levels of learning. The patterns identified are discussed in Chapter 5. The *complexity analysis* sought to appraise the cognitive load imposed by each of the curriculum designs. These results of this analysis are discussed in Chapter 6.

A Caveat on Method

My position as the author of the *Form 3 and 4 Social Studies Handbook* (Ministry of Education, 1991) and as one of the five writers of the 1997 curriculum statement needs to be declared because it has the potential to bias my judgment of these designs. While I cannot simply dismiss the possibility of bias, there are powerful factors mitigating

against it. Firstly, I am already on public record as critical of aspects of the 1997 design (Aitken, 2000, 2003, 2005). Secondly, the 1991 and 1997 designs were not of my own making. I shared both tasks with other writers and the process was supervised and edited by the Ministry of Education. Thus I contributed to, but did not determine, the final design. And finally, the implementation evidence outlined in Introduction to this thesis about the 1997 design is compelling. Whatever I may have thought about the quality of design at the time, the evidence of what is happening in classrooms reflects substantial problems. This research is claiming that design, through its role in sense-making, is an influential factor in successful implementation so I need to be open to the potential barriers to sense-making in the document. I do not share the view of the writer of the Health Education curriculum statement that the responsibility for successful implementation lies substantially beyond the design:

Health and Physical Education in the New Zealand Curriculum has much to offer all young people both in their current and future lives. The challenge now lies with its implementation: boards of trustees, principals, curriculum committees, teachers and teacher education providers. (Tasker, 2004, p. 219)

The presumption inherent in this statement is that the curriculum itself is unproblematic and that responsibility rests with implementing agents. While reassuring for those of us who write curriculum, it overlooks the mediating influence of cognition and the role of design in this mediation.

CHAPTER 4

Design and Shifts in Meaning

New policy by its very nature shifts purpose and meanings, sometimes in subtle and cosmetic ways, but more often in the case of national curriculum change in substantive terms. The research summarised in Chapters One and Two suggests that such shifts have implications for sense-making. Hill (2001), for example, reported that shifts in language and meaning are not always understood by implementing agents in the manner intended by the curriculum designers - in part because of the introduction of new terms with which the designers are familiar but teachers are not, and in part because of reinterpretations of old terms that are misunderstood by teachers because they continue to attribute existing meanings to these terms. Spillane and his colleagues' (2002) work also reinforces the significance of the historical context that precedes policy arguing that implementing agents make sense of policy in relation to existing understandings. As a consequence they often attend to the superficial and conserve existing understandings, viewing the reform as similar to what they already do. Drake et al. (2001) have also shown that it is not only the manner of the implementation that is influenced by past experience but also the investment in making change. Such research findings, reinforcing as they do the role of schema in understanding policy, have significant implications for policy design because they enable policy developers to anticipate possible misconceptions and to design policy to address these.

In the case of New Zealand social studies curriculum the historical context has particular significance because of the long periods of time between each curriculum statement. For secondary teachers more than 30 years elapsed between the Thomas Report and the 1977 syllabus and a further 20 years before the 1997 curriculum statement was introduced. Primary teachers' only direct experience of social studies before the 1997 statement was based on 36 years of teaching informed by the 1961 syllabus. Irrespective of the extent to which teachers implemented the full intent of

these curricula, the research cited above suggests that these lengthy experiences would have helped form views of social studies and meanings about practices that influenced subsequent sense-making about new curricula.

This research also suggests that there are actions policy makers can take to reduce the likely impact of prior schema on understanding the intent of new policy. Many of these relate to the process of professional development and interpretive documentation that supports new policy but some relate to the expression of the policy itself – primarily, the need to be clear about the rationale for the changes and to reduce the possibility for misunderstanding by acknowledging possible misconceptions and by describing new ideas with the support of clear definitions and examples. The discussion below examines the extent to which policy design has attempted to address significant shifts in the nature and purpose of social studies, and in the manner of representing progression of learning within the subject, between 1942 and 1997. The first of these shifts – a move away from history and geography - relates primarily to the context of secondary schools; the others relate to the contexts of both primary and secondary school. The chapter concludes by summarizing existing understandings about social studies that are likely to be pertinent to future curriculum design and by suggesting strategies to address these understandings.

Shift One – The Move Away from History and Geography

There have been two phases in social studies curriculum design marking the distancing of the subject from the teaching of history and geography. The first of these phases occurred as social studies replaced existing history and geography syllabi in secondary schools in 1942 and in primary schools in 1961. The second occurred as various social studies curricula sought to extend the disciplinary base of the subject beyond these two subjects into other social sciences and humanities. What is interesting from a design point of view is the different ways that each curriculum document has acknowledged these changes and their significance, especially given that

for secondary school teachers of social studies in particular their predominant disciplinary background in history and/or geography has been a powerful influence on their schema for social studies.

Acknowledging the Initial Shift away from History and Geography

Perhaps not surprisingly given its pioneering role in introducing social studies, the 1942 curriculum made the most explicit attempt to establish a rationale for curriculum change. There were two aspects to this rationale. The first was to reference the English Board of Education White Paper on educational reconstruction and its recommendation that a new direction was needed in the teaching of history and geography to:

arouse and quicken in pupils a livelier interest in the meaning of citizenship in this country, the Empire, and of the world abroad. Education in the future must be a process of gradually widening horizons, from the family to the local community, from the community to the nation, and from the nation to the world. (Department of Education, 1959, p. 27)

The 1942 curriculum statement claimed that these sentiments were expressed by many who made submissions to their committee and that they were of sufficient force to recommend that up to School Certificate stage

history, geography, and civics (with some changes of content), as well as certain new material derived from the first hand study of community life and from social studies other than those just mentioned, be regarded as one subject and learned as such. (p. 29)

The report was not explicit about the parenthetical reference to changes in the content of civics but it was more specific about the changes in history and geography – in effect developing a second rationale for their replacement.

In recommending the development of social studies as an integrated study “organised around the central theme of the life of man [*sic*]” the report argued that much of what was required to develop this theme “is apt to fall between the fields of history and geography”. Geography it was claimed “rarely goes much beyond the economic

aspects of human activity”, while in history “social and cultural developments tend to be overshadowed by the political, and the pupil himself may be left to make the jump from the present to the past” (p. 28-29). In developing this rationale, however, the report did not reject a role for history and geography. It acknowledged that “the ‘way of life’ of any people is, of course, inexplicable apart from a study of their history and geographical setting” (p. 29) but was clear nonetheless that “the facts and relationships that should be most strongly emphasised in a social studies course *are precisely those that are apt to be neglected when history and geography are treated as separate subjects* [italics added]” (p. 29).

What the rationale for the new curriculum was claiming, therefore, was that the new integrated subject through its focus on “ways of life”, especially the social and cultural dimensions, would “help to create ... individual interests of many kinds” and serve the purposes of citizenship education better than the more erudite economic and political studies that dominated history and geography. The curriculum reinforced this rationale for change by being very clear about the two new aims for the subject and the connection between them – “the development of individuals who are able to take their part as effective citizens of a democracy”, and “to deepen pupil’s understanding of human affairs and to open up wide fields for personal exploration”(p. 27).

Reaction to the Initial Shift

From a curriculum design perspective the approach to the development of a rationale in the Thomas Report is interesting because while it was clear about the twin purposes of the subject and the relationship between them it was, in part, based on a negative – the claim that history and geography lack relevance and appeal. While this may have been true, it is a dubious basis for winning over opinion. Spillane’s (2002) explanation of the role that emotions play in cognition, whereby teachers seek to preserve their positive self-image and resist attempts to tell them that what they have been doing

previously is wrong, suggests that negative rationale may work against the desired change. This appears to have been the case for the 1942 curriculum.

In a strongly-worded defence of geography as a school subject the first professor of geography at The University of Auckland in his inaugural address argued that “the new hybrid – social studies – was quite unnecessary” (Cumberland, 1950, p. 18). He did not disagree with the Thomas Report claim that there was dissatisfaction with the ways that history and geography were being taught in schools but he argued that the reason for this was that “*the wrong kinds of history and geography were being taught*” (p. 18 – his emphasis). The solution, therefore, was not to “scrap...the defaulting subjects for another” but to teach “the right kinds of history and geography” – i.e. those that helped students “discover what places are like” and understand “period history”(p. 19). For Cumberland, not only was fusion a “virtually an impossible task” (p.17) but it also diminished the knowledge base for a better understanding of society deriving from the distinctive chorological and chronological viewpoints of the two subjects. In this view he was supported some years later by New Zealand’s first social studies educator (Gorrie, 1963, 1964). She argued that social studies did not strongly enough express an intellectual purpose (Gorrie, 1963) and that the reference point for this intellectual mission needed to be the “established disciplines” of geography and history. She wrote a handbook for teachers to reinforce her view that social studies was really a “covering term” for a reinvigorated school history and geography that made both subjects “vastly more exciting and meaningful for students” and argued that there should “be little objection in principle to the abandonment of the title ‘social studies’, and the creation of separate history and geography courses” (Gorrie, 1964, p. 152).

There is evidence that the Thomas Report rationale was not compelling for some secondary teachers either. Martin (1952) reported some years after the introduction of the 1942 curriculum that “a large number of teachers are still uncertain – some even hopelessly confused – about the meaning of social studies” (p. 148). He attributed this

in part to confusion deriving from the curriculum about the role of history and geography. Like Cumberland, he could not see how history and geography did not contribute directly to the aims of social studies and could not, therefore, understand their apparent rejection. One of the early leaders of the development of social studies in New Zealand, reflecting on his classroom experience with social studies, commented that "I substituted a social studies programme for separate history and geography because over a period of time it seemed just plain commonsense" (Herbert, 1967 – cited in Lewis, 1980, p. 126). Likewise, Evison (1963) writing as the head of a history department confessed that, fifteen years after beginning to teach the new curriculum, the "rationale ... has eluded me. I find it too wide, too vague, and too superficial" (p. 23). This lack of acceptance among history teachers of the rationale for social studies was further reflected in a report many years later by Meikle (1994), a pioneer and advocate of the new approach to social studies. She claimed that her presentation on social studies at a history teachers' course in 1952 "ranked first equal with two others as Talks That Have Scared Me Most" especially after two Heads of Department commented, prior to her presentation that they were "gunning" for her (Meikle, 1994, p. 109). The practices of many secondary school social studies teachers continued to be influenced by their subject backgrounds with their predominant concern being not the nature of social studies but preparation for School Certificate examinations in history and geography (Meikle, 1960). Social studies assessments were frequently based on School Certificate geography and history papers (Kivell, 1970) and, as Meikle's experience showed, concerns about social studies impact on the integrity of history and geography were passionately expressed (see for example, Openshaw & Archer, 1989, 1992).

What this brief overview of a contentious period (Openshaw & Archer, 1992) in New Zealand social studies history reveals is that in spite of attempting to establish a rationale for the new subject, this rationale was not sufficiently compelling, in the face of other interests, influences and pressures, to sway the positions of a significant number of history and geography teachers in New Zealand secondary schools. Its negative justification probably did not help but it also needs to be acknowledged that

the forces the Thomas Report was trying to influence – teacher discipline background and the accountability demands associated with national examinations at Form 5 (Year 11) – were very powerful and that the failure to make change was not solely a design one. As Shuker (1992) has explained it was also strongly influenced by the Department of Education’s deliberate hands-off approach to teacher professional development in social studies.

Acknowledgement in Subsequent Designs

Subsequent curriculum designs have taken a much less explicit approach to the shift away from history and geography. Rather than attempting, as the 1942 curriculum did, to explain the differences between history and geography and the new subject, these curricula have sought to establish a role for history and geography *within* social studies. The way that this role has been expressed in curriculum design, however, has been somewhat problematic. Consider, for example, the reference to the contributing disciplines in each of the social studies curriculum statements (Figure 6).

| 1961 | 1977 | 1997 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <p>A many-sided attack on the great educational project of understanding the world and of learning how to carry on a good life is informed by the specialist subjects of anthropology, history, geography, literature, music, art and languages.</p> | <p>Social studies draws on the knowledge, ideas and methods of inquiry of the social sciences and the humanities, as well of the experience of students and teachers.</p> <p>For each theme some important ideas are provided for teachers. They are drawn from the social sciences and humanities, and in most cases have the support of more than one discipline.</p> <p>(The Important Ideas) are drawn from the social sciences and the humanities.</p> | <p>Social studies is the systematic study of an integrated body of content drawn from the social sciences and the humanities.</p> |

Figure 6: *The Stated Role of the Subject Disciplines within Social Studies Curriculum Design, 1961-1997*

These are the *only* statements in each of these curriculum documents on the role of the subject disciplines in social studies. Aside from the 1961 statement there is no specific reference to history and geography¹⁰ and even within this statement the role of these two subjects is diluted by the addition of four others, which for the most part are very different in nature to history and geography. Even more significantly there is *no* reference in any of the official supporting documents for these curricula to *any* named social science or humanity (Department of Education, 1967, 1971, 1975, 1978, 1986; Ministry of Education, 1997): this in spite of the fact that these documents provide guidance for teachers on such areas as sources of information, principles for planning and content selection.

This is not to say that history and geography are not present in the curriculum documents, rather that their role is not elaborated in any transparent sense. The 1977 curriculum was based around sets of important ideas at each of four levels. It was acknowledged that these ideas were drawn from the social sciences and humanities, and often from more than one discipline. While many are recognisable as ideas connected to history and geography they are not always obviously so and a significant proportion were also drawn from sociology and anthropology. These ideas broadened the disciplinary base for social studies in a manner consistent with the subject's aims but their inclusion marked a new phase in which the distinctive points of view that Cumberland had claimed for history and geography became indistinguishable. History and geography did not exist in any sense as stand alone bodies of knowledge and method. They had become instead sources of ideas that were not always easy to attribute to one or other subject and that competed with ideas from an expanded range of social sciences.

This in itself may not have been a serious design issue if it reflected the existing backgrounds of teachers and their schema for social studies. This, however, was

¹⁰ It is interesting to note the Maori version of the 1997 curriculum *does* identify the contributing disciplines - sociology, anthropology, political science, history, geography and economics (Ministry of Education, 2000).

clearly not the case. Lewis (1980), one of the leading figures in the design of the 1977 curriculum, claimed in a review of the curriculum development process that many secondary school teachers were frustrated by the new curriculum and that Campbell's (1978) comment on the syllabus was an accurate reflection of their mood:

Take for example the Social Studies syllabus: this is supposed to be society in action, but it has been put together by sociologists with a particular line, and the majority of us have a background in history and geography. We have to move away from these studies and we have not had the training, we have not had the study (cited in Lewis, 1980, p. 126).

Campbell might legitimately have added "and we have not had the explanation". The 1977 curriculum design shifted the focus of social studies even further away from history and geography than the Thomas Report, but it failed to acknowledge and address the powerful schema for history and geography that were still prevalent among secondary teachers and that were being reinforced externally by increasingly critical reports of the state of student knowledge of New Zealand history (for example, Barr, 1988; Low-Beer, 1986; Simon, 1992). One of these reports went so far as to suggest that the state of knowledge amounted to a form of "social amnesia" that was particularly serious in relation to the forgetting of the history of interaction between Maori and pakeha¹¹ (Simon, 1992).

The consequence of the perceived diminished role of history and geography was a "growing trend of splitting social studies into history and geography at forms 3 and 4" (Murrow & Bennie, 1993, p. 19) and, within social studies, a tendency to become selective about topics to the extent that the subject more closely resembled history and geography (see for example, Broad et al., 1993). This latter process was given some impetus by two actions taken by the Department of Education. In 1988 the Director General of Education commissioned a report from New Zealand university history departments on heritage and history in schools (Departments of History of the New Zealand Universities, 1988). This report made specific recommendations about the content of history that needed to be included in social studies. Although these

¹¹ Maori term for non-Maori New Zealanders – refers particularly to New Zealanders of British and Irish heritage.

recommendations were never fully implemented they did inform the second initiative by the Department – the development of a handbook (Department of Education, 1991) to assist with the implementation of the 1977 syllabus.

The handbook divided the Form 3 and 4 curriculum into topics at each level, some of which had a much more overt geography and history focus than that evident in the 1977 syllabus¹². The generally positive reception for this handbook was reflected in the comment of one teacher that “I think it might have saved the subject ...the (1977) syllabus was so wishy-washy, you had people doing all sorts of things they felt could fit in ...(the handbook) gave the school a structure that we could actually follow” (Murrow & Bennie, 1993, p. 15). This comment illustrates the role that design can play in teacher understanding and acceptance of change. The handbook retained the intent of the 1977 syllabus but it repackaged the intent in a manner that connected with existing schema. Not only did it make transparent history and geography content in topic titles but it also replicated two design features that teachers of history and geography were using in senior school teaching – the use of focusing questions and the use of achievement based assessment. The handbook, therefore, began to look more familiar and more understandable. To be fair, the impact of the handbook design was never really tested because it was soon to be overtaken by the 1997 curriculum.

From a design perspective the 1997 curriculum reverted to the submergence of history and geography. The knowledge and understanding component of this curriculum was organised around five content “strands” entitled “social organisation”, “culture and heritage”, “time, continuity and change”, “place and environment”, and “resources and economic activities”. This design feature had two effects. First, it avoided the use of history and geography as organising frameworks for the knowledge component of social studies but alluded to their inclusion by adopting such covering terms as “place

¹² For example: A study of how society was organised in some European communities from which settler groups came to New Zealand in the nineteenth century (Form 3); A study of the Treaty of Waitangi and the issues that have arisen out of it (Form 4); A study of the ways some communities and cultural groups approach the use and conservation of natural resources (Form 4).

and environment” for geography and “time, continuity and change” for history. Second, it continued the 1977 syllabus approach of positioning whatever recognition that history and geography did have through these strands alongside strands that alluded to sociology, anthropology and economics. What the 1997 design effectively did was to introduce a new language for the social science disciplines. What it did not do, however, was to explain that language in a way that made transparent connections to the disciplines. In fact some significant new terms – “place” and “social organisation” - were not defined at all. The role of this new language was further constrained by the achievement objectives. At level 5, for example, the level targeted by most secondary teachers, the place and environment strand was represented by two objectives, one relating to the mobility of people, the other to the significance of place. In effect, therefore, geography in the junior secondary school, if teachers recognised it as such, was reduced to two ideas both of which made it difficult to incorporate geography’s environmental perspective – a perspective whose absence from the 1977 syllabus had previously been seen by geography teachers as “letting geography down” (Murrow & Bennie, 1993, p. 18). It is not surprising, therefore, that the National School Sampling Study on the implementation of the national curriculum reported that of the 23 comments about the social studies, six requested the inclusion of more geography and seven the inclusion of more history. As one teacher commented:

A geography component should be clearly identified and a history aspect for New Zealand. Geography is much neglected and only touched on incidentally. It needs to have a clear focus (cited in McGee et al. 2003, p. 248).

Clearly, not much has changed since the debates of the 1950s and 1960s.

Summarising the Design Approaches to the Shift away from History and Geography

What this review of shifting role of history and geography in social studies illustrates is a strong and persistent ambivalence evident in curriculum design. On the one hand, the introductory statements in the curriculum attribute a significant role to the subject disciplines. They are the information base; the source of content and ideas. This is strengthened by their positioning in the documents – the second sentence of the 1977

document and the first one in 1997. On the other hand, beyond this initial expression their role is not explained and, in effect, submerged by the prominence given to organising ideas drawn from across the social sciences.

This prominence of important ideas as the organising framework for social studies is not in dispute. As a principle it has much to recommend it from a curriculum design (for example, Taba, 1962; Erickson, 2002; Wiggins, 2001) and a learning point of view (for example, Nuthall, 2004a). What is problematic from the design perspective is the consistent failure in each of the curricula to take account of the powerful existing schema for social studies held by secondary teachers in particular and to acknowledge the understandings and knowledge that they bring to social studies. It is not that history and geography should not be integrated along with the other social sciences into social studies, it is rather that the way in which this is done needs to be more sensitive to the backgrounds of those who teach it. Without this, teacher understanding of curriculum intent in secondary schools will continue to be compromised (Hill, 2001; Spillane et al., 2002; Spillane, 2004) along with their emotional commitment to its implementation (Drake et al., 2001; Hargreaves, 1998). The *Form 3 and 4 Social Studies Handbook* (Department of Education, 1991) showed that including recognisable elements in design offered the possibility for greater understanding and acceptance of intention, making this a worthy feature to be considered in future designs. It is certainly not good enough to perpetuate in design the ambivalent reinforcement of the role of the disciplines in introductory statements and with every other feature of design to distance the curriculum from such statements. This applies to all of the social sciences but it is especially significant for history and geography because these are the source disciplines for most secondary school teachers of New Zealand social studies.

Shift Two – From Social Studies as Understanding “People and their Way of Life”; to Social Studies as Understanding “Human Behaviour”; to Social Studies as Understanding “Society”

It is to be expected that the nature and purposes of a school subject will evolve (Goodson, 1995), especially a fledgling subject such as social studies that started out by deliberately unmooring itself from the academic disciplines. The design challenge that this evolution poses from a sense-making perspective is to understand the misconceptions that implementing agents may bring to a changed curriculum emphasis from their previous experiences with the subject, and to help them understand the nature of *and reasons for* new directions. The history of the shift away from the original disciplinary base of history and geography has shown that this design challenge was generally not well-managed. This section considers how well subsequent shifts in the nature and purpose of the subject have been managed. An overview of these shifts, based on the analysis of purpose statements in Appendix B (p. 261), is presented in Table 2. The predominant purposes of the original curriculum for secondary (1942) and primary (1961) schools are highlighted in lighter shading in this table. While both curricula acknowledged a citizenship education purpose a strong emphasis was placed on doing this through the development of knowledge and understanding about how people live and about the wider world. The darker shading in Table 2 identifies significant new emphases in subsequent curricula. The predominant new idea introduced in 1977 was the emphasis on the analytical, social sciences-directed understanding of “human behaviour”. The new purposes in this curriculum expressed the intention that students not only examined the behaviour of others but that they also became more aware of their own behaviour, values and participatory skills, thus introducing a “life-skills” element alongside the analytical focus. While the 1997 curriculum reiterated many of the purposes of social studies expressed in earlier curricula there was a significant new emphasis in language towards understanding “society” and, in particular, New Zealand society. The significance of each of these changes from a sense-making perspective is examined below.

Table 2: Changes in Purpose of New Zealand Social Studies as Described in Four New Zealand Curriculum Documents

| Purposes of Social Studies Classification Based On Appendix B, p. 261 | | Number of “meaning chunks” | | | |
|--------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------|------|------|------|
| | | 1942 | 1961 | 1977 | 1997 |
| To develop knowledge and understanding about ... | Society | 1 | - | - | 4 |
| | Human Behaviour | - | - | 2 | 1 |
| | How People Live | 2 | 5 | 2 | 6 |
| | New Zealand and New Zealand Society | - | 1 | 1 | 8 |
| | Wider World | 2 | 4 | - | 4 |
| As citizenship education through ... | Knowledge of contribution, duties and responsibilities | 2 | 1 | 1 | 1 |
| | Development of participatory skills | 2 | 2 | 4 | 6 |
| | Actual participation | 1 | - | 1 | - |
| | Development of commitment to social justice | - | - | 1 | 1 |
| As the development of life-skills through ... | Development of self-awareness and personal values | 1 | 2 | 9 | - |
| | Development of the ability to interact and communicate with others | - | 2 | 2 | 1 |
| As the development of the process of ... | Inquiry | 3 | 1 | 3 | 5 |
| | Values analysis | - | 1 | 3 | 4 |
| | Social problem-solving | 1 | 1 | 2 | 2 |
| As an integrating social science. | | 1 | - | - | 1 |
| TOTAL MEANING CHUNKS | | 16 | 20 | 29 | 44 |

Note – the lighter highlighting identifies emphases in the **original** curriculum for secondary (1942) and primary (1961) schools. The darker shading identifies **significant new emphases** in subsequent curricula.

Understanding People and their Way of Life

The data in Table 2 reveal that the 1942 and 1961 curricula both placed a strong emphasis on understanding “people” and “their way of life” in order to broaden students experience of the world beyond their immediate horizons.

The 1942 curriculum outlined the “substance of the curriculum” in three broad groupings: the first of these made specific reference to developing understanding of the “social life of the pupils’ own community and of New Zealand as a whole ... (including) how the community lives and is managed”; the second required study of “the social life of the major peoples of the contemporary world”; while the third recommended “a course in the history of Western civilisation ... with special reference to the history of Britain and New Zealand, and the growth of ... ways of life”.

The emphasis was even more strongly reflected in the 1961 curriculum. This curriculum began with the words “social studies is a study of people...” and subsequently reinforced this by stating that “there is only one thing – ‘how do people live and what do they aspire to?’”. The focusing questions associated with the suggested studies, beginning as they did with the stem “how people live and meet their needs in...” or even, more simply, “how do/did people live...”, focused attention on such aspects of material culture as clothing, shelter and transport. These studies also took the study of “people” into such areas as “finding out how animals and plants live, and grow, and keep healthy; how machines work; and how things are made”. This expansion of content into areas only indirectly connected to people was given further expression in some of the official support materials for the 1961 curriculum. For example, a section on “charts” in one of the Department of Education handbooks illustrated the life cycle of a butterfly and the early stages in the life of a kitten (Department of Education, 1971, p. 74); and another section on “displays” detailed the intricate workings of a flourmill (without any specific mention of people) (1971, p. 86). Teachers were also encouraged to view the Botanical Gardens as a source of content for social studies with children using the experience to think about how birds “kept warm, what they ate, and how they protected themselves” (1971, p. 115).

The 1961 curriculum design and its support materials encouraged the all-encompassing and somewhat unfocused view that social studies was about “people”. By 1981 this had become of sufficient concern to the Department of Education that it

gazetted a statement clarifying the intention of the 1961 curriculum (Department of Education, 1981). This statement, while not an official curriculum, aimed to shift teacher thinking about the purposes of social studies. It did so by explaining the need for change and it recommended a strategy for making this change.

Encouraging the Shift Away from "People"

Unlike the Thomas Report, the rationale for change in the 1981 *Education Gazette* statement (Department of Education, 1981) was not restricted to criticism of what had gone before. The statement acknowledged that the 1977 Form 1-4 syllabus had substantially changed circumstances at the upper levels of the primary school (Forms 1 and 2) and that consequently a new response was needed at other levels of the primary school. It also acknowledged that the definition of historical time periods in the 1961 curriculum was artificial and restricting. Thus the rationale affirmed difficulties that teachers and schools were facing with the curriculum itself. The rationale did, however, also signal the need for change in a critical manner. It was claimed that social studies had focused too much on "countries and national groups" rather than on smaller groups of people closer to the experience of children; that too much emphasis was being placed on material culture - what people "did" - rather than why they did it; and that topics were often developed as "isolated studies" that inhibited the "deeper and broader understanding of human behaviour". Thus, the rationale for change was signalled in both an affirming and in a critical manner.

To help shift understanding the design suggested how the organising question that had dominated the 1961 curriculum could be slightly changed to capture the sense of reform required. The question "how do people live and what do they aspire to?" became "what can we learn about why people think, feel and act as they do?" A shift away from a narrow focus on material culture was thus encouraged. This illustrates how design can be sensitive to current thinking and practice by connecting to the familiar – in this case, the key curriculum question - but nonetheless aim to shift thinking in a desired new direction. The design used a different but equally simple

device to encourage teachers to move studies closer to the experiences of children. A classification was introduced to guide teacher selection of “groups of people” for study, namely: people with whom children may participate, people whom children may observe, people who are distant in time and place, and people who are in imaginary situations. The inclusion within this classification of two categories directly connected to children’s experience aimed to head teachers away from what the Department regarded as an over-emphasis on “countries”. Teachers were also encouraged to sharpen the focus of their teaching by applying the new focussing question, not to *all* aspects of the lives of the people they were studying, but to *particular areas* of knowledge such as “relating to others” and “interacting with the environment”.

These design devices illustrate sensitivity to existing schema while at the same time attempting to shift these schema in a new direction. They also spawned a series of support materials for teachers that reinforced the new intent using a simple one-page planning structure (Department of Education, 1980, 1986). There is some doubt, however, that these design devices and their supporting documentation had as much impact as intended on primary school teachers. As Barr (1989) commented:

the 1961 syllabus... has been supplemented and modified over the years by so many other documents and statements that primary teachers are totally bewildered, unsure of what is official, what is compulsory, what are suggestions and what the whole lot means. (p. 5)

Thus while the 1981 *Education Gazette* statement modelled design principles consistent with the sense-making recommendations made in the first part of this thesis, the context within which these were disseminated to schools via a series of official and unofficial modifications greatly weakened their impact. As Spillane (2004) observed, the cognitive confusion surrounding multiple messages may be every bit as great as the confusion surrounding a single message if these messages have differential status and if they are disseminated through different channels of communication.

Understanding Human Behaviour

The 1977 curriculum also encouraged a shift in teacher thinking about social studies, away from an amorphous focus on “people” and towards a focus on “human behaviour” (see Table 2, p. 95). It signalled this shift in intention in its very first statement. It began with a 1961 stem “social studies is about people” but it immediately qualified this with the statement: “how they think, feel and act, how they interact with others, and how they meet their needs and organise their way of life”. The material culture that had dominated earlier interpretations of social studies focus on “people” was present in the final part of this statement but much greater prominence was now given to the factors that motivate human actions and interactions between people. This statement was then followed by another claiming that “social studies should make students and teachers look at and think about human behaviour realistically, objectively, and with sensitivity” and by the encouragement to develop “ideas about human behaviour” through a social science inquiry framework. Human behaviour was not restricted to a consideration of others. In fact there were eleven purpose statements in the 1977 curriculum (Table 2) reinforcing the idea that social studies was also about the students own “personal and social development.”

This shift to the more dispassionate study of ideas about human behaviour and to the development of personal life skills marked a significant change for teachers familiar with social studies as a study of the material culture of people. Unlike the 1981 *Education Gazette* statement, however, the 1977 curriculum, made no attempt to explain why the shift was being made or how the study of “human behaviour” was different from the study of “people”. The curriculum relied upon altering the focusing question, using much the same wording as the 1981 *Education Gazette* statement subsequently used, but unlike that statement it did not show how this wording evolved from earlier statements of purpose and, therefore, lost the opportunity to connect the new curriculum to existing teacher schema and to anticipate and correct possible misconceptions.

Ironically one of the elements of the design that was most clear to teachers may itself have also partly undermined the shift intended by the curriculum writers. At each level, the curriculum listed “*recommended studies*”. As a teacher, and Head of Department in the 1980’s, it was these that we latched onto as we tried to make sense of the new curriculum. In this we were supported by the textbook writers. But instead of focusing on the development of ideas about human behaviour within these recommended studies we brought our schema for “social studies as history and geography” and as the study of “people” to bear on our interpretation of what was required. Thus we taught, along with most other secondary school departments at the time, such topics as Victorian England, Nazi Germany, China, Pacific Island Communities, and the mobility of people (migration and urbanisation). But we taught these largely as all-encompassing studies of people in other places and times. The 1977 curriculum design, by not acknowledging existing schema but by providing examples that seemed to accommodate them, compromised the ability to shift teacher thinking about social studies in a new direction. As a consequence, the espoused focus on developing ideas about human behaviour was buried under a mass of traditionally taught content.

Acknowledging the Shift to Understanding Society

By 1997 the understandings of social studies, influenced as they were by multiple previous curriculum experiences, were as diverse as they had ever been. There was still an element of social studies as the study of people but to this had been added ideas about understanding human behaviour and personal skills development. Lingering on in the secondary schools was the idea that social studies should be more closely aligned to history and geography. What the 1997 design did was introduce another element into the mix.

The 1997 curriculum gave prominence to the idea that social studies was a study of “society”, in particular to the study of New Zealand society (see Table 2, p. 95). It did this, however, alongside the continued expression of earlier ideas about social studies.

It used a *whakatauki*¹³ to introduce the curriculum that implied that social studies was “about people, people, people” – a reinforcement of the older aim of the subject. It defined the knowledge strands largely in relation to “people” rather than “society”: for example, “people’s allocation and management of resources”; “people’s interaction with places”. It also sustained the 1977 curriculum idea that students needed to be “challenged to think clearly and critically about human behaviour”. From the point of view of shifting meanings, therefore, this design reflected some confusion. “Society” was given prominence in the aim but this was diminished by the subsequent emphasis on “people” throughout the balance of a document. It is not surprising that the Education Review Office notes the continuation of some themes that were evident in earlier versions of social studies in their criticism of “units of work focus[ing] on such topics as places or buildings” (Education Review Office, 2001, p. 1).

The design difficulty here is similar to that observed in the discussion of history and geography. The abstract principle statements in the curriculum give prominence to an idea (in this case the new idea of “society”) but this is not supported by other elements of the design that explicitly make this new meaning clear. In fact the document in some of its language reverted to former meanings - “people” and “human behaviour” - that had proved to be problematic. Furthermore, at no point did the design explain the shift to “society” or attempt to connect it to the earlier ideas about people and human behaviour. It was almost as if by sprinkling these earlier ideas teachers would feel comfortable with the new curriculum. As Spillane has illustrated, however, without a clear rationale for change the inclusion of such elements merely affirms the interpretation that nothing has changed and enables teachers to implement the curriculum consistent with their existing, rather than new, understandings of the subject.

¹³ Proverb or saying.

Shift Three – From Progression by Topic to Progression by Outcome

Because the curriculum designs have covered multiple levels of schooling they have each included approaches to the progression of learning. Prior to 1997 the designs established progression by specifying different contexts for study at each level of schooling. The 1997 curriculum marked a major change in approach based on the national imperative to define progression by pre-specified outcome. The discussion in this section focuses on the way in which this shift was represented in design by comparing progression within the 1997 curriculum with progression in the two curricula that immediately preceded that curriculum – 1961 (for junior and middle primary school teachers) and 1977 (for senior primary and secondary school teachers).

Progression by Topic – Teacher Understandings associated with the 1961 and 1977 Curriculum

The 1961 curriculum adopted a blocking arrangement to progression whereby different topics were prescribed for each of junior, middle and upper primary school. While the curriculum acknowledged that some overlap could be beneficial, topic repetition between blocks was minimised by using a modified form of expanded universe (local at junior primary; “outside the Commonwealth” at the middle primary; within the Commonwealth and the Pacific Rim at senior primary); and by using the logic of chronology (before 1800 at middle primary; after 1800 at senior primary). Where the potential for repetition persisted on the borders of these cut-off points teachers were urged to avoid overlap. Progression, therefore, was driven by two main ideas – that difficulty could be defined by *context* based on increasing distance from children’s immediate experience, and that progression of learning was defined by children’s general progression through school. The curriculum through its blocking arrangement also encouraged the practice of teaching the same material to students at different class levels within each block.

The 1977 curriculum reinforced the 1961 curriculum ideas of progression by context and level of schooling but it also established two further approaches. Firstly, progression from level to level was defined by logically linked themes with all learning at each level designed to reinforce understanding of the theme. This approach had developed from Bruner's (1960) and Taba's (1962) "spiral" argument that what should be emphasised in curriculum was basic ideas, revisited repeatedly until the students have "grasped the full formal apparatus that goes with them" (Taba, 1962, p. 13). Secondly, while the curriculum applied progression to the understanding of important ideas it resisted its application to the *process* of learning. A single list of specific objectives based around the enquiry process was provided with no distinction by level. The clear implication was that these objectives could be understood *at any level* depending upon the content to which they were applied. This manner of expressing objectives as, in effect, "principles of procedure" was consistent with Stenhouse's (1975) promotion of the process approach to curriculum which disavowed pre-determined behavioural outcomes by level.

The Shift to Progression by Outcome

It may be claiming too much to suggest that all teachers using the 1961 and 1977 curricula understood the progression ideas inherent in these documents¹⁴ but, whatever their level of understanding, the 1997 curriculum marked a significant change in thinking about the nature of progression in social studies. Driven by the requirement of the national curriculum to define learning at eight different levels, the 1997 curriculum developed a new approach to progression based on the specification of achievement objectives at each level. The way that these achievement objectives were written signalled a major change for teachers because they challenged the organisation of teaching around themes encouraged by the blocking arrangements in the 1961 curriculum, and they challenged two basic premises of progression. No longer was progression defined by increasing complexity of content based on the

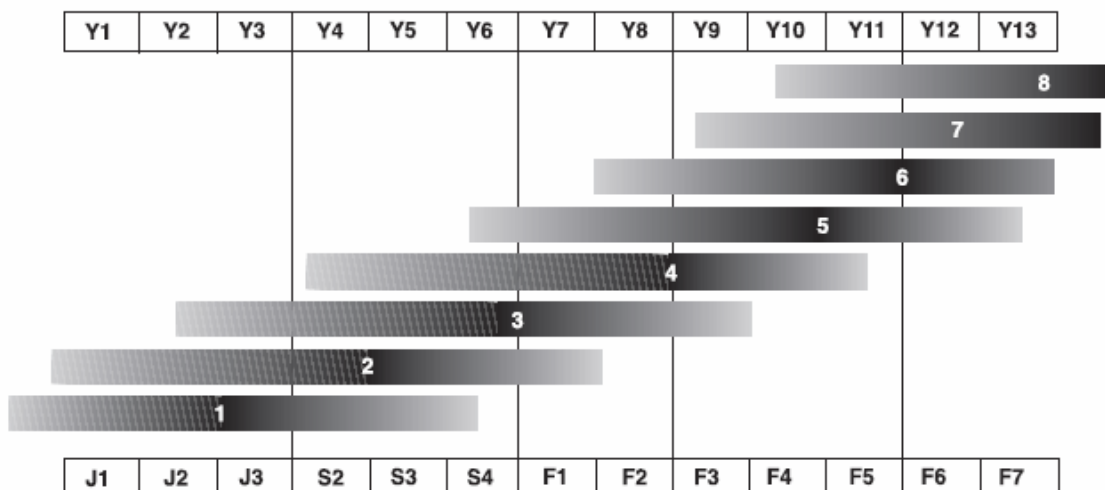
¹⁴ For example, the logical links between themes although expressed diagrammatically in the 1977 curriculum were not obvious. In spite of being trained in the 1977 curriculum, and teaching it for fourteen years, it was not until 2004, in conversation with one of the original writers (Jim Lewis, personal comment, November 2004), that I understood the nature of the progressive logic linking the four specified themes at each level.

expanding universe idea – it was now defined by pre-specified *outcomes*. Furthermore such outcomes were also specified for the *process* of learning. This shifted a fundamental idea of the 1977 curriculum that the development of process skills was differentiated by the context to which they were applied rather than by accomplishment of an expanding range of pre-specified actions.

In themselves, these changes may not have been a problem. Progression via “expanding universe” is more of an assumption than an empirically tested basis for progression, and in spite of the spiral, process-orientated design of the 1977 curriculum there was little evidence that teachers closely monitored the development of conceptual understanding upon which this design was premised. In fact one of the motivating factors behind the handbook written to help teachers clarify the 1977 curriculum (Ministry of Education, 1991) was the desire to enhance the quality of assessment practices in social studies. The problem was that the new approaches to progression in the 1997 curriculum did not acknowledge more than 30 years of teacher experience of progression by topic and context, and that there were significant logical flaws in the way in which progression was expressed.

Lack of Acknowledgement of the Shift to Progression by Outcome

The Introduction to the 1997 curriculum claimed that “the curriculum sets out a clear and structured progression of achievement objectives that spans all levels of schooling” (p. 7). There is no reference in this Introduction, or anywhere else in the 58 pages of the curriculum or the 104 pages of the supporting Handbook (Ministry of Education, 1998), that this was a fundamental shift away from progression by topic. The assumption, reinforced by the inclusion of a diagram that had appeared in earlier national curriculum statements in *other* subject areas (Figure 7), was that teachers understood the new basis of progression that underpinned the national curriculum.



Y1-13 refers to Year Levels in the current school system. J1-F7 refers to the previous names for these year levels. 1-8 refers to the levels at which achievement objectives were required to be written in each essential learning area. Thus individual students in, for example, Year Level 5 (previously Standard 3), could be expected to be studying achievement objectives anywhere between levels 1 and 4.

Figure 7: The Relationship between Year Level and Curriculum Levels as Represented in Social Studies in the New Zealand Curriculum.

This was, however, a completely new concept for secondary teachers and, in spite of the fact that primary teachers had implemented earlier statements in mathematics, science and English based on this premise, the very different manner of developing progression by achievement objectives within each of these documents challenges the assumption that there was a common understanding in this sector either. The social studies curriculum statement presented the diagram (Figure 7) without any title or labels and the related text reference, which did not acknowledge the diagram, stated that “students learn at different rates, and, therefore, at any time, individual students or groups of students of the same age could be working towards achieving objectives at different levels within and across strands”. This complex wording was the only reference in the text to the fundamental point of difference from the earlier practice of progression by topic.

Flaws in the Expression of Progression by Outcome

Even if teachers understood the intent of the diagram, the basis of progression in the curriculum was not clearly elaborated in the design. Progression was built into two elements of the design – the process of learning and the knowledge strands.

Progression within the Process of Learning

Significantly, for teachers experienced with the 1977 curriculum, the 1997 design shifted the idea that the difficulty of the learning process was defined, not by any particular aspect of the process itself, but by the *context* to which it was applied. The 1997 curriculum defined progression *within the process itself* irrespective of the content to which it was applied. Not only was this shift not explained, but its manner of expression in design created somewhat arbitrary distinctions between the levels. For example, at the lowest level of the Inquiry Process students were expected to “collect and record information”, at the next level to “collect and record information from a *range of sources* [italics added]”, and at the next to “collect and record information from a range of *primary* and *secondary* sources”. The implication is that more sources reflect greater complexity and that complexity is somehow associated with primary and secondary sources. The nature and content of these sources is not considered – merely their range and origin.

Likewise, in the Values Exploration Process, at the lowest level students were required to “give reasons why people hold particular values positions”, at the next level to add to this an understanding of the “consequences of holding different values and positions” and “ways of accepting and resolving differences related to values and positions”. By the next level, however, these understandings were no longer required and were replaced by three quite new ideas. What the curriculum design was portraying was a major shift in thinking about progression within social studies learning processes. No previous design had developed the idea that the complexity of a process was related to the actions students carried out *within* the process and yet, what the examples above illustrate, is that not only was this change not explained, it was also not supported by a powerful and compelling internal logic.

Progression within the Knowledge Strands

Similar difficulties arise when considering the way in which the curriculum dealt with the progression of knowledge. Writing some years later one of the curriculum writers made it clear that the design intention was for the curriculum to be “constructivist, ...conceptual, ...[and] cumulative” (Barr, 1999, p. 3). It is difficult, however, to work this out from the design.

The curriculum was organised around five strands, themselves with conceptual labels (for example, social organisation, place and environment) and yet neither the curriculum, nor its supporting Handbook (Ministry of Education, 1998) stated at any point that students should progressively develop their understanding of these concepts. Teachers were simply informed that the “concepts and ideas that relate to a particular achievement objective” were reflected in “indicators” listed beneath each objective and that these indicators provided examples only of what students “*may* [italics added] come to know or understand”. Teachers were further encouraged not to see these indicators as exclusive, with the instruction that they could “supplement or replace those provided”. In a subsequent section of the text, teachers were also provided with lists of 130 concepts “that are reflected in the five strands” and were further informed that these lists were “not comprehensive” and that they should “add to them as appropriate”. The lack of explicit acknowledgement of conceptual progression in the curriculum statement and its supporting documents, along with the tentative nature of references to concepts in the curriculum language (“may”) and the overwhelming number of conceptual possibilities, mitigates against the clarity of conceptual progression that Barr claims the curriculum writers intended.

There is evidence that teachers made little sense of the espoused conceptual nature of progression. The Education Review Office (2001) commented that the achievement objectives read as discrete bodies of knowledge without obvious vertical linkages and that “teachers ...(did) not see the social studies concepts buried within them” (p. 1). Facilitators working with teachers on the 2002 – 2003 social studies exemplar project

also reported that few teachers were aware of the conceptual basis of the achievement objectives. It is probably not surprising that this fundamental design feature was not recognised by teachers.

This design difficulty was further compounded by the way the achievement objectives were written. Consider, for example, one set of achievement objectives for the strand “Culture and Heritage” (Table 3).

Table 3: Achievement Aim and Objectives Levels 1-8 Culture and Heritage Strand

| | |
|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Achievement Aim | |
| Students will understand the contribution of culture and heritage to identity. | |
| <hr/> | |
| Achievement Objectives that develop this aim. | |
| Students will develop knowledge and understanding of: | |
| Level 1 | Features of the culture and heritage of their own and other groups. |
| Level 2 | Ways in which communities reflect the cultures and heritages of their people |
| Level 3 | How practices of cultural groups vary but reflect similar purposes. |
| Level 4 | Why and how individuals and groups pass on and sustain their culture and heritage. |
| Level 5 | Ways in which cultural and national identity develop and are maintained. |
| Level 6 | How and why cultures adapt and change. |
| Level 7 | Ways in which people’s culture influences their perceptions of and responses to events, issues, and the activities of other cultures. |
| Level 8 | How communities and nations respond to challenges to their identity. |

The Achievement Aim in this example establishes a clear and distinctive conceptual basis related to the concept of “identity”. The Achievement Objectives were presumably designed to progressively develop understanding of this concept. It is difficult, however, to follow the logic associated with this progression. The word “identity”, the key conceptual understanding, does not emerge until level 5 and then only once more at level 8. At all other levels it is only implied and mostly very indirectly.

It is also difficult to read a logical progression into the achievement objectives. It is difficult, for example, to understand why the achievement objective at Level 3 (“how practices of cultural groups vary but reflect similar purposes”) is more difficult than the achievement objective at Level 2 (“ways in which communities reflect the cultures and heritages of their people”) which requires considerable interpretative skill and background knowledge if it is to be achieved in any but the most obvious, and material, sense. Furthermore, by introducing the Level 3 objective at that level, a fundamental understanding related to culture, and to the reduction of ethnocentrism (Smythe, 1984), is delayed. The Level 1 achievement objective about cultural features also risks ethnocentric responses in the sense that cultural features are likely to be reinforced in the minds of students of this age (5 and 6-year olds) as different, and possibly unusual, unless the teacher is alert to the significance of this thinking. It would have been more logical to have followed this achievement objective with the achievement objective at Level 3 in order to develop understanding of common purpose behind different practices. As stated and as sequenced in the curriculum, the Level 2 achievement objective risks extending the potential ethnocentric responses at Level 1 through stereotypical and superficial cultural attributions to particular features of the community.

Teacher Interpretation of the Change to Progression by Outcome

The lack of logical progression illustrated by the examples above means that the achievement objectives read more as separate studies than as the progressive development of an idea. In fact the emerging evidence of implementation would suggest that this is exactly how they are being read. Table 4 records the frequency of social studies units of work, largely written by teachers, on the Ministry of Education *Te Kete Ipurangi* website by year level and curriculum level.

Table 4: Number of Social Studies Units of Work by Year Level and Curriculum Level on Te Kete Ipurangi Internet Site

| Curriculum Level Target | Year Levels | | | | |
|-------------------------|-------------|-----------|-----------|-----------|------------|
| | Years 1&2 | Years 3&4 | Years 5&6 | Years 7&8 | Years 9&10 |
| Level 1 | 8 | - | - | - | - |
| Level 2 | - | 3 | - | - | - |
| Level 3 | - | - | 11 | - | - |
| Level 4 | - | - | - | 13 | - |
| Level 5 | - | - | - | - | 27 |
| Level 6 | - | - | - | - | 1 |

Notes:

1. In a small number of units a “supporting objective” was identified at a different level.
2. One unit at Year Levels 4-6 covered curriculum levels 2 and 3.
3. At Years 9 and 10 there is some differentiation between each year – 4 of the units were targeted at Year 9 only and 6 at Year 10 only.

If the intention of the curriculum was being realised – i.e. students of the same age working towards achieving objectives at different levels – it would be expected that units should consistently be based on achievement objectives *at more than one level*. In other words, students could work, within any particular unit, on achievement objectives consistent with their level of prior knowledge and skill. The data in Table 4 reveal, however, that in virtually all cases the units are *single-level specific*. The curriculum level achievement objective has been used the organising idea of the unit. The assumption here is that if the student experiences the *topic* then they are working at the level of the achievement objective.

This same pattern is observed in other published resources. For example, a recent text on Year 9 and 10 social studies was based entirely on the Level 5 achievement objectives (Hunter, 2004). Likewise a commonly-used textbook series, also based entirely on Level 5, explains that the series is “accessible for students *of every range of ability at level 5* [italics added]” (Naumann, 1999a, 1999b, 2000, 2001a, 2001b). This is specific acknowledgement that the achievement objectives are “topic markers”, rather than markers of levels of conceptual understanding.

These data reveal a fundamental misunderstanding of the levelling intention of the 1997 curriculum that reflects teacher sense-making informed by their experiences with previous curriculum and based on progression by topic rather than by pre-specified outcome. It reflects the failure of the 1997 design to express in any substantive or practical way the new ideas behind progression that were emerging at the national level and that were the very cornerstone of the *New Zealand Curriculum Framework* (Ministry of Education, 1993).

This is not to say that the method of progression by topic as implemented by teachers was inappropriate. Elley (2004) has explained at length the difficulty of developing progression in such subjects as English and social studies, and the flaw of developing this progression independent of context. What is being argued here is that the design is confusing. It claims one thing in the statement of general principle (“students of the same age could be working towards achieving objectives at different levels...”) but does not carry this through clearly into structures and content that follow. It has been stated subsequently (Barr, 1999) that the intention of the writers was to develop conceptual progression but the complex manner in which this was stated in curriculum and the lack of logic in the development of achievement objectives compromised this intent and clouded opportunities for sense-making. As a consequence, the intent of the reform and of the national curriculum was largely subverted.

Conclusions

The analysis in this chapter reveals that there have been significant shifts in the nature and purpose of social studies but that these have been unevenly acknowledged in each new design. Where this acknowledgement has been provided in a way that is critical of previous design, such as the rejection of history and geography in the 1942 curriculum, the old ideas have endured, especially where these ideas have been powerfully developed in the schema of teachers through their prior training and

experience. Where the acknowledgement has been made, however, in a way that shows how changes can build on current practice, the reform ideas have greater cognitive potential to be more accessible and less damaging to teacher self image because they make more transparent the connection of the new ideas to existing schema. Showing, as the 1981 *Education Gazette* statement did, how a common practice such as using focusing questions can be adapted to shift intent, and how the introduction of a simple classification can broaden teacher content selection; or, as the 1991 *Form 3 and 4 Social Studies Handbook* did, how commonly taught topics from the past – especially those based on teacher discipline backgrounds – can be integrated into a new approach, is more likely to be understood and accepted than those approaches that fail to acknowledge past experience. Effective, however, as these design devices might be in the cognitive, theoretical sense argued here, experience with the 1961 curriculum suggests that their usefulness to teachers may be seriously compromised by both the number and the uncertain status of the documents within which they are communicated to teachers.

This analysis has also illustrated that where the curriculum has relied on description of the new idea, without reference to the old ideas it is replacing, it has often lapsed into a mixture of new and old language that is likely to inhibit sense-making. The design needs to reflect its principles consistently so that examples are clearly aligned to the principles. It is unhelpful to sense-making to make claims in abstract principles about the intention of the design only to undermine them through lack of clarity or inconsistency in the other sections of the design. It is also unhelpful to sense-making if the logic of the design is not clearly apparent, especially where the design is attempting to achieve a significant shift in thinking. Though an abstract principle may or may not be understood, it is the detail of the design that in the end becomes most significant because it is this detail that is most closely connected to teacher practice. If the detail is confusing or contradictory teachers will fall back, as they have so clearly done in implementing progression from the 1997 curriculum, on current knowledge and practice and miss the intent of the reform. Significantly, for the current round of national curriculum development, this analysis also reveals that designers should not

assume that because there is a common national change (such as the move to levelling by achievement objective) that all teachers will have had experience of, and knowledge about, that change. Even where teachers have had previous experience it should also not be assumed that they can immediately interpret the change within the context of a different curriculum area.

CHAPTER 5

Design and Coherence

The previous chapter has suggested how design has the potential to inhibit new understandings of the purpose and nature of curriculum *between* one design and the next. This chapter shifts the focus to the sense-making potential evident *within* New Zealand social studies curriculum by examining the internal coherence of each design. The analysis focuses on two major coherence issues: coherence of purpose, and coherence between purpose and the other elements of the curriculum design.

Coherence of Purpose

One of the main findings of the analysis of curriculum purposes (Appendix B p. 261 and Table 2, p. 95) is the sheer number of purpose statements in each document. It is not simply that one or two aims for the subject are stated at the beginning of the design. Rather, purposes are continually reinforced, and added to, throughout each document. This is particularly evident in the 1997 curriculum that makes 44 separate purpose statements spread across many pages of text. Table 2 also shows that the purpose statements express a range of ideas about the nature and intentions of the subject. This gives rise to two important sense-making issues. If the purposes are mutually exclusive then their inclusion establishes a contradiction that is difficult for implementing agents to resolve (Haigh, 2004) and that consequently inhibits sense-making. If, however, the purposes are multiple but complementary, sense-making is not necessarily inhibited unless the implementing agents' domain knowledge is limited (Kintsch, 1993). In which case, making transparent the connections between purposes using such devices as text signaling (Loman & Mayer, 1983; Mayer et al., 1984; and Meyer, 1975) and/or diagrams is an important aid to sense-making.

There is little evidence of contradiction of purpose within each of the four curriculum designs. While each establishes multiple purposes such as the development of

knowledge and understanding about people, or human behaviour, or society; the development of citizenship skills and attitudes; and the development of reflective and analytical skills, there is nothing inherently contradictory in these multiple intentions. In fact it makes sense, and is common curriculum practice, for purposes to address knowledge, skills and attitudes. What is less obvious in the curriculum designs, however, is the explicit integration of these purposes within the curriculum texts. This lack of integration has been evident in the various forms of expression discussed below.

Specific but Perfunctory Acknowledgement of the Relationship between Purposes

The 1942 curriculum offers the clearest expression of multiple purposes by setting out under a heading “Aims” two purposes labelled (a) and (b). One purpose relates to the development of individuals as citizens, the other relates to the development of knowledge of human affairs. In studying the second purpose the curriculum acknowledges that “to some extent this ... aim is involved in the first” thus signalling a connection, albeit in a limited way. There is little else in the curriculum statement that reinforces this but at least it is acknowledged.

Progressive Restatement of Purposes in Slightly Altered Language

The 1961 curriculum also attempted to make connections between aims but these are marred somewhat by a style of expression that progressively introduces new ideas under the auspices of clarifying the aims but that actually re-states the ideas in a way that slightly alters meaning. For example, it is initially claimed that social studies helps students take their own place “in the world” but two paragraphs later qualifies this by describing the aim as developing “intelligent, competent and responsible people in our New Zealand society”. Likewise, the initial paragraph encourages the development of an “intelligent and sympathetic interest” in other people. Two paragraphs later this is slightly rephrased as the development of “sympathies and sensitivities” necessary for contributing to New Zealand society. The ideas here are not contradictory but their progressive qualification and associated slight alteration in phrasing clouds their meaning. The expression of purposes is further inhibited by the initial assertion that

social studies has an “Aim” but the subsequent reference is to “two aims” throughout the remainder of the statement, and in its title. It is unclear in the end whether there is one, two, or more complementary aims, or one predominant aim and, if so, whether this is the knowledge aim (understanding the world) or the participatory aim (helping students take their place in the world).

Disconnected Style of Expression

The 1977 and 1997 designs adopt a very different style of expression: a disconnected form of writing that implies but does not state relationships. The following extracts from these two curricula illustrate this approach (Figure 8).

| 1977 (as set out on page 4 of the curriculum) | 1997 (as set out on p 7 of the curriculum) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Social studies is about people: how they think, feel and act, how they interact with others, and how they meet their needs and organise their way of life.</p> <hr/> <p>Social studies draws on the knowledge, ideas and methods of inquiry of the social sciences and humanities, as well as on the experience of students and teachers.</p> <hr/> <p>Social studies should make students and teachers look at and think about human behaviour realistically, objectively and with sensitivity. It should help us make decisions about our personal and social development, and about our participation in a changing society</p> | <p>Social studies is the systematic study of an integrated body of content drawn from the social sciences and the humanities. It enables students to develop their knowledge and understandings of the diverse and dynamic nature of society and of how interactions occur among cultures, societies and environments. Students develop and apply skills as they investigate society, explore issues, make decisions and work cooperatively with others. The understandings and skills they develop enable them to participate in society as informed, confident, and responsible citizens.</p> |

Figure 8: Examples of Expressions of Purpose in the 1977 and 1997 Curriculum Statements

The layout of the 1977 curriculum physically separates the groups of ideas implying that they are not directly connected. For example, the third statement presumably relates to the first: that is, through the study of how people think, feel and act students will be helped to think about human behaviour realistically, objectively and with sensitivity. The way that these statements appear in the curriculum, however, implies that they are two separate, non-mutually reinforcing aims. Likewise, as stated, the second statement about social studies drawing on the social sciences makes little sense because it does not connect the statement to any *reason* for doing this. In a similar way, the first sentence of the 1997 statement closes without a purpose. It is true that in this case the next sentence begins with “it enables” but this new sentence is an unnecessary disconnection. The *reason* for drawing on the social sciences in both statements would have been made much more explicit by concluding each of these statements with the phrase “to help students understand how people think, feel or act” (1977) or “to help students understand the diverse and dynamic nature of society” (1997).

It is perhaps revealing that the statement in the 1997 curriculum drew directly on the position paper prepared for the Ministry of Education prior to the writing of the final curriculum statement (Barr et al., 1997). In this position paper the definition of social studies was stated as follows: “social studies is the systematic study of an integrated body of content from the social sciences and humanities *to develop citizens with skills of problem solving and decision making on crucial social issues* [italics added]”. In this case the reason for drawing on the social sciences and humanities was made very clear by strongly connecting them to a citizenship purpose. The omission of this direct connection in the 1997 curriculum may simply be a function of the “official” disconnected style of writing adopted throughout the curriculum or it may reflect a desire to avoid controversy about the role of the social sciences that the statement would inevitably have generated. Either way, what the extract in the right-hand column of Figure 8 (p. 116) illustrates is a sequence of intention but a sequence that is not strongly held together by explicit connections.

Altered Sequencing and Omissions and Additions of Purpose

In addition to the lack of strong explicit connection between the purpose statements in Figure 8, the sequencing of the statements is counter-intuitive. In both the 1977 and the 1997 curricula the fundamental purpose of social studies is not revealed until the *last* sentence. The purpose of social studies, its justification as it were for inclusion in the total school curriculum, in 1977 was that it helped “students make decisions about... personal and social development, and about ... [their] participation in a changing society”; in 1997 it was to enable students “to participate in society as informed, confident and responsible citizens”. The other purposes *enable* these aims by developing knowledge and skills related to them, sourced in the social sciences and humanities. As stated, however, the strength of these connections, even the very recognition of their existence, is lost. It is ironic, therefore, that in the 1997 curriculum, one page later (p. 8), the sequence of expression is reversed – the “aim” is stated in bold, highlighted text, followed by statements about the supporting nature of knowledge about society and the development of skills. What is omitted in this restatement, however, is any specific reference to the social sciences and humanities as the source of knowledge. Thus the design expressed two confusions – a re-expression of the relationship between purposes in a different, albeit more logical order and the omission of an element that was earlier considered important.

This pattern of re-expressing purposes features elsewhere in the 1997 curriculum, further undermining its coherence. In the *Foreword* to the curriculum a total of 14 separate purposes are stated in two paragraphs. These paragraphs have been reformatted in Figure 9 to highlight each purpose and to isolate the connectives that link these purposes.

Note – the text of the curriculum is reformatted here as separate phrases to highlight meaning chunks and sentence starters but the exact text wording and syntax is retained. Meaning chunks related to purpose are highlighted in grey; sentence starters are underlined.

Social studies helps student to understand their world and gives them the skills and knowledge to take their part in society. This statement focuses on the study of society and of human activity in the contexts of continuity, change and contemporary issues. Students will be able to investigate and explore important social issues, make decisions, work cooperatively, and build their knowledge of their history, their land, and their society.

Social studies is important to the whole community. It emphasises the skills and processes involved in social participation, which, along with the prescribed settings and perspectives, will help students to become informed, confident and effective citizens. Students will be challenged to think clearly and critically about human behaviour and to explore different values and viewpoints. An emphasis will be placed on learning about New Zealand society and the countries and regions that have significance for New Zealand.

Figure 9: Extract from the Foreword to Social Studies in the New Zealand Curriculum (Ministry of Education, 1997) Highlighting Purposes and Connectives

Aside from the sheer number of statements of purpose in one small section of the curriculum, from a coherence perspective the paragraphs in Figure 9 also pose some difficulties. The purposes are not mutually exclusive but in the absence of connectives (Meyer, 1975) that explain the relationship between them they read as if they are distinctively different ideas. With one exception (“It emphasises ...”) the sentences begin with phrases that make no explicit reference to the previous sentence or to the ideas within it. The sentences simply keep adding more ideas creating a final overall impression of a subject with multiple, separate purposes.

Given what follows on the next three pages of the document there are other interesting features about these paragraphs. The main purpose of social studies, as eventually highlighted on page 8 of the curriculum, is referred to here as the key purpose statement but with two significant changes. First, the wording is different – “informed, confident and effective citizens” rather than “informed, confident and responsible citizens”; and second, the related purposes within the sentence refer only indirectly to the development of knowledge and understanding about society (“prescribed settings and perspectives”) and once again make no mention of the role of the social sciences and humanities. The *Foreword*, therefore, both alters and omits ideas that appear later in the document.

The *Foreword* also does the opposite. The phrases “understand their world”, a direct reference to the 1961 curriculum, and “think clearly and critically about human behaviour”, a direct reference to the 1977 curriculum, are not repeated in any other part of the curriculum. In other words, the *Foreword* introduces purposes for the subject that receive no explicit acknowledgement or support in the remaining 58 pages. As the previous chapter on shifts and meanings in social studies illustrated, brief reference to earlier ideas of social studies, without acknowledging their origins and without further development in the curriculum, does little to engage teacher schema with new ideas. It also does little, it is argued here, to advance a coherent understanding of the nature of the subject. If the manner in which a curriculum design expresses its purposes is not clear, and if the connections between multiple purposes are not transparent, then in spite of potential compatibility between these multiple purposes they are likely to either be read as contradictory and ignored, or attended to selectively as teachers focus primarily on those that are consistent with existing schema.

In some circumstances this failure of curriculum design to clarify purposes, and the connections between them, may not matter. As Knitsch (1993) has explained, requiring a reader to make their own connections, thereby forming their own meanings, may be

beneficial to the development of a deeper and more flexible understanding. But Knitsch acknowledges that this conclusion only holds true when the expertise of the reader in the domain is high. For two main reasons - general disagreement about the purposes of social studies, and the domain knowledge of social studies teachers - this is arguably not the case in New Zealand social studies.

General disagreement about the purposes of social studies

As the previous chapter has shown, teacher experience with earlier curriculum designs established a basis for the development of multiple schema about the nature of social studies. Anecdotal evidence from teachers indicates that there remains a significant group for whom the subject's purposes are, or should be in their view, connected to history and geography; there is another group for whom social studies continues to be about developing understanding of "people" and "ways of life"; another for whom the 1977 emphasis on life skills still lingers in spite of the appropriation of this skill development by Health Education; and, others who view the subject as preparation for citizenship.

In addition to the influence of experience with previous curricula there are also influences associated with those who write about, and publish in the field. One of the most important of these has been Kelvin Smythe who has published units of work in New Zealand primary school social studies for more than 20 years. He has introduced yet a further view of the purposes of social studies when he suggests that the aim of the subject should be:

... to develop in children a sympathetic and valid understanding of their own and other people's way of life, both in New Zealand and elsewhere, in the present and in the past – the main purpose being to help children be at ease with, and to appreciate individual and cultural difference (Smythe, 1998, p. 127).

While this echoes elements of the 1961 curriculum definition of the aims of social studies, its focus on cultural difference is much more particular than in that curriculum. Another writer who has published in secondary schools advances a

further particular, but different, aim. Citing Giroux, Harrison (1998) argues for an “emancipatory” social studies whose primary purpose is to:

stimulate (students) passions, imaginations and intellects so that they will be moved to challenge the social, political and economic forces that weigh so heavily upon their lives. In other words, students should be educated to display civic courage, i.e. the willingness to act as if they were living in a democratic society. At its core, this form of education is political, and its goal is a genuine democratic society, one that is responsive to the needs of all ... (p. 78).

It is notable that these two definitions are offered in the same book on New Zealand social studies (Benson & Openshaw, 1998) along with another by an academic with a long research and teacher education record in the subject (Barr, 1998). In summarising the curriculum traditions in social studies, Barr simplified the purposes of the subject to two “twin goals” – understanding the world and effective participation as a citizen. The book, therefore, mirrors in the writings of its contributing authors the general difficulty of the subject – the lack of a clear, agreed aim.

This difficulty is not confined to New Zealand. In Australia, Marsh (2004) reports that while there is a vacuum in the curriculum for a subject that addresses significant societal problems from a social justice perspective, there is still no clear consensus as to whether, or how, social studies¹⁵ might achieve this purpose. In the United States, Brophy and Alleman (1996) claim that “teachers and students often are confused about the nature of social studies as a school subject” and, as a consequence, downgrade its importance by “selecting activities for convenience or student interest rather than for their value as means of accomplishing clearly formulated social education goals” (p. 4). Judging by the Education Review Office (2001) report on the implementation of the 1997 social studies curriculum, Brophy and Alleman’s claim that many activities in social studies are little more than “busy work: word searches, cutting and pasting, colouring, connecting the dots, and so on” (p. 31) may not be far off the mark for what passes as social studies in some New Zealand classrooms.

¹⁵ The term “social studies” is not used in Australia. The equivalent curriculum area is entitled Studies of Society and Environment (SOSE) or, in New South Wales, Human Society and Its Environment (HSIE).

Other writers discussing the United States experience with social studies view it as a battleground with “turf wars among competing camps” (Evans, 2004, p. 1) or as a field of continuing “conflict over goals” where, with reference to the debate about whether the subject should be called “social studies” or “the social studies”, it is claimed that “we have not yet decided whether the subject is singular or plural, a unity or a collection” (Zevin, 2000, p. 3). Zevin himself, in subsequently attempting to clarify the definition of social studies, illustrates even in this clarification the myriad of ideas that the subject ostensibly incorporates:

... secondary school social studies can be defined as the study of those data, analyses and ethical issues that deal with human history, human behaviour and human values in relation to technology and ecology. In short, social studies ... is about how and why people act, what they believe, and where and how they live and have lived. It is about actions, ideas, values, time and place – a series of topics that covers an immense range and is somewhat amorphous but that allows tremendous latitude in the selection of both materials and methods for teachers (p. 6).

While Zevin presents his final statement as a positive, a less charitable, and possibly more accurate interpretation, is that this amorphous nature simply reflects a subject that is poorly developed in both purpose and content.

Layton (1972) has argued that school subjects develop over three identifiable stages. The first of these stages is characterised by leadership from a small group of enthusiasts with a focus on student needs and interests. In the second stage scholarly work in the subject begins to emerge and teaching of the subject is increasingly undertaken by specialists trained in the field. In the final stage the school subject takes its lead from the findings and practices of specialist researchers and scholars and a fully constituted professional body of teachers becomes established. The difficulty for New Zealand social studies is that the subject has struggled to develop beyond the first stage (Openshaw & Archer, 1992) and as a consequence has lacked defining reference points from within (among teachers) and from without (academic disciplines in the universities).

The domain knowledge of social studies teachers

These observations about the generally poorly defined nature of social studies are compounded by a further factor. Teacher expertise in the subject is relatively limited. Faced with external directives via the National Administration Guidelines (NAGs) and increasingly strong accountability measures and professional development opportunities in literacy and numeracy, most primary schools prioritise learning in language and mathematics. In the informal hierarchy of school subjects these are often followed most closely by science. It is in these three curriculum areas that Ministry of Education chooses to participate in international testing¹⁶ and it is these that are, in the public perception, most commonly held to be important. The effect of these pressures, along with the demands associated with teaching a total of seven essential learning areas, is that many primary school teachers relegate social studies to a lower tier of time and attention. Furthermore, few primary school teachers have any academic background in the contributing social sciences and humanities. Data from the National School Sampling Study (NSSS) in social studies indicate that only 9.8 percent of primary teachers have a degree in social sciences, and that 29.5 percent have no formal qualification in a social science subject at School Certificate level or above (McGee, et al., 2002).

The problems are somewhat different in secondary schools. The NSSS data show that 79.9 percent of secondary teachers of social studies have a degree in the social sciences. Although the data does not record the specific subjects, it is likely that most of these qualifications are in history or geography. While this would appear to afford a strong discipline base for social studies teaching, two factors mitigate the impact. As explained in the previous chapter, progressive social studies curriculum designs have shifted the subject towards a broader range of social sciences than just history and geography. More significant, however, is the allegiance that discipline training in history and geography establishes towards the teaching of these subjects in the senior

¹⁶ Although it participated in the mathematics, science and reading studies the Ministry of Education did not participate in the most recent International Association for the Evaluation of Educational Achievement (IEA) Civic Education Project (Torney-Purta et al., 1999). New Zealand's only participation in an IEA civic education survey was in 1971 (Torney et al., 1975).

school. My work over the years in social studies courses with pre-service teachers indicates that it is history and geography that most often attracts these teachers to teaching; and it is these subjects that they most want to teach. Associated with this is the perceived status of teaching in the senior school and the perception that there are less discipline problems with senior students who have chosen history and geography as distinct from compulsory social studies that all students do irrespective of their interest or motivation. In recent years, the implementation of the National Certificate in Educational Achievement (NCEA) has also drawn whatever spare attention secondary teachers might have had away from social studies and towards the new assessment demands of their senior subjects. Not only, therefore, do secondary teacher backgrounds in history and geography affect their schema for social studies; they also affect the commitment to, and prioritization of, the subject. To a small extent this is being countered by a growth in senior school social studies (Year 11-13) as the impact of the 1997 curriculum is felt in schools, but the pool of those teaching in this area is still relatively small.

The combined effects of a lack of agreement about the subject's purpose and a generally lower level of commitment by teachers to social studies compared with the other subjects they teach mean that Knitsch's (1993) observation about the potential advantages associated with a lack of explicit text structuring are of doubtful benefit in social studies curriculum design. In fact it can be argued that social studies design needs to assume a much stronger leadership role than that required in other subjects and that this leadership role has to begin with an unambiguous statement of the purpose of the subject. It is unhelpful to perpetuate multiple purposes in design on the assumption that the subject is sufficiently robust and mature to accommodate these and that teachers are sufficiently knowledgeable and committed to resolve them. While this might be true of the subject experts who write the curriculum it is much less true for the much majority of teachers who need to implement it.

Coherence between Purpose and other Curriculum Elements

While clarity and coherence of purpose are fundamental to sense-making about a curriculum such as social studies, the way in which these purposes are carried through into other elements of design is equally important because it is these other elements – content, teaching and learning approaches and assessment – that are most immediately related to the classroom practice of teachers. Fundamentally, the design issue here is one of alignment of intention and content although the relationship is not as straightforward as it might seem. Alignment is desirable where curriculum purposes are clearly stated and the connections between purposes are elegantly and coherently described. In fact, misalignment in this case can undermine a great deal of the work done in setting out such purposes. If purposes are confused or incoherent, however, then alignment with each of these purposes may generate still further confusion as teachers try to make sense of the potentially conflicting detail of what they are required to implement. Both of these problems of alignment have been evident in past curriculum designs for social studies.

Alignment at the Structural Level

Alignment is most strongly evident in the four curriculum designs at the general structural level. In other words, the alignment is evident in the match between the espoused general purposes and the structures that guide teaching approaches and content selection. The 1942 curriculum aim of deepening student understanding of “world affairs” is matched by a three part content structure based on knowledge of the social life of the local community, of the “major peoples of the contemporary world”, and of the “origins of civilization and the development of western civilization”. Specific content suggestions are made within each section. The 1961 curriculum offered a similar match, with the general aim of understanding how people live supported by a content structure based on current and historical contexts at local, national and overseas levels. The structural alignment was strengthened by the re-expression later in the document of the main aim in the form of a question: “how do people live and what do they aspire to?” and the subsequent organization of content,

also largely by questions. Not only, therefore, was there an alignment of content and purpose, there was also an alignment of content with the way in which the curriculum was encouraging students to learn – through “active and questioning minds”.

Structurally, the 1977 curriculum took the alignment principle even further. The curriculum aimed to develop ideas about human behaviour (thinking, feeling and actions) through an inquiry approach based around key questions. At each level of the curriculum a set of *Important Ideas* about human behaviour was suggested as a “guide to the selection of content” and a *Basic Question* was posed to “help guide student inquiry”. The lists of *Recommended Studies* all began with the phrase “To investigate...” In this way, two of the main elements of the espoused purpose of the curriculum were specifically expressed in its structure. To reinforce the nature of this alignment a type of flow diagram was included to show how the curriculum elements connected to each other.

The 1997 curriculum aim of developing knowledge and understandings about human society through the use of “social studies processes” was matched by a curriculum document dominated by achievement objectives directed at these purposes. The knowledge and understanding dimension was to be achieved through studies based on five conceptual *Strands*: social organization; culture and heritage; time continuity and change; place and environment; and resources and economic activities. For each of these Strands two achievement aims were defined and each was supported by a set of achievement objectives at eight progressive levels of learning. The extent to which this structural element dominated the curriculum is evident by its position in the document (a fold-out flap at the back that could be easily referred to by teachers) and by the number of pages of supporting detail devoted to its elaboration (20 of the 58 pages). The three *Processes* of inquiry, values exploration and social design-making were similarly defined by aim and achievement objective. Indicators of progression within each process were also defined. A fold-out flap at the front of the document paralleled the summary that was used for the knowledge and understanding

objectives. The curriculum, therefore, to much the same degree as its predecessors, gave *structural prominence* to the connections between the dual knowledge and skill aims of social studies and the content requirements of the curriculum.

Misalignment between General Principles and Curriculum Specifics

While alignment is present within the general structures of each curriculum, at the level of more specific detail alignment begins to unravel. This happens as the curriculum designers attempt to provide more detailed examples of content and as they attempt to describe the relationship between curriculum elements.

The 1942 curriculum compromised its intent to provide scope for supporting individual student interests, and its guidelines to teachers to focus on depth rather than breadth (“a few important aspects of social life” rather than “masses of half assimilated information”), by providing considerable detail within each of the content sections as to what might be covered. The section on the community study, for example, listed 15 elements “implied” by such a study (for example, law and justice, government, transport and communications). The section on the origins of civilization suggested six major areas of “emphasis” (for example, the accumulation and diffusion of knowledge and learning, the succession of social and economic systems). While intended largely as examples, the broad scope of the suggested content and its expression in the form of lists suggested the very breadth and coverage that the curriculum was trying to avoid.

The 1961 curriculum also significantly undermined its original intent through a basic flaw of alignment. As explained, the curriculum aligned its participatory purpose with an active approach to teaching and learning by re-expressing its aim as a question. This question was then used to guide the selection of content. A major problem arose, however, because the re-expressed question only captured part of the aim. The question “how do people live and what do they aspire to?” focuses attention on the material aspects of cultural; it takes attention away from motivation (“beliefs”) and

from identification with different cultures (“enter sympathetically into their feelings”). As described in the previous chapter, this simple alignment error contributed to a Department of Education decision 20 years later to gazette a guideline to the curriculum (Department of Education, 1981) that rephrased the question as “what can we learn about why people think, feel and act as they do?”

Misalignment and the Use of Summary and Overview Charts

The examples from the 1942 and 1961 curricula illustrate how the desire to provide greater clarity for teachers can, if poorly worked through, undermine alignment and intent. Another approach to clarity has been to represent the relationship between curriculum elements using summary and overview charts. While doubtless well-intentioned and potentially helpful to cognition, this has served to exacerbate, rather than avoid, alignment problems.

The 1977 syllabus included two charts summarizing the relationship between curriculum elements (Figure 10). The chart in the left hand column was intended as a curriculum overview; the chart in the right-hand column shows how this overview was applied to one level of the curriculum (Form 1).

Page 11
Planning the School Scheme

The THEME provides an emphasis and cohesion for the year's study

The **BASIC QUESTION** is a means of organizing approaches to the theme.

The IMPORTANT IDEAS are the teachers' guides to the selection of appropriate content and learning experiences.

Sections A, B, and C give a general framework of study and set out the minimum range of cultural and social settings appropriate to the questions and themes

Important aspects of study are numbered 1, 2 and 3. All these **important aspects of human behaviour** should be considered with any of the recommended studies.

Recommended studies are printed in italics.

Some examples are listed alongside each recommended study. Teachers may choose one of those listed or they may choose another one that illustrates the recommended study and can be supported by available resources.

Pages 12-13
FORM 1 Programme

The Basic THEME is Cultural Difference

The **INTENTION** is that a study of cultural differences will lead to a better understanding of human behaviour.

The IMPORTANT IDEAS **about human behaviour** that follow could become part of students' thinking during the year's work. They are guides to the selection of content and learning experiences, not statements towards which students are to be directed. Other ideas, including some from other themes, may also emerge from studies made during the year.

(14 ideas then listed)

A **BASIC QUESTION** that should help guide student inquiry is: How do ways of life differ, and what can be discovered about human behaviour (including our own) through studying these differences?

It is recommended that STUDIES be selected from each of the areas printed in italics. Examples other than those listed should also be considered. The examples selected will provide settings for students.

(studies then listed)

Note - highlighted sections identify potential alignment problems

Figure 10: Elements of Curriculum Design, Form 1-4 Social Studies Syllabus Guidelines (Department of Education, 1977)

At first glance these two charts appear helpful, set out as they are in a clear and apparently logical sequence. But on closer inspection their apparent logic and coherence is much less evident. An INTENTION is omitted from the curriculum overview (left-hand column) but included in the programme planning requirements (right-hand column). “Important aspects of human behaviour” are included within the “aspects of study” element in the overview but within the IMPORTANT IDEAS element in the programme planning requirements. In the curriculum overview there is no *stated* connection between the IMPORTANT IDEAS and the two elements that precede these ideas – it is *presumed* that the ideas arise from or relate to the QUESTION and the THEME, but this is not specifically stated. This relationship becomes even more uncertain when, in programme planning requirements (right-hand column), the sequencing of the BASIC QUESTION and IMPORTANT IDEAS is reversed. The IDEAS now precede the QUESTION, perhaps implying that rather than the ideas emerging from the exploration of the question (an inductive approach) they are used to structure possible answers to the question (a deductive approach). It is not that either approach is necessarily wrong; it is simply that they are *different* thereby disrupting the logic of alignment and creating potential cognitive confusion.

A similar form of misalignment is evident in the 1997 curriculum. On page 10 of the curriculum a diagram summarises the curriculum elements and the relationship between them. Five pages later another summary diagram is presented and then a final one a further nine pages further on in the document. These three diagrams are reproduced as they appear in the curriculum in Figure 11.

| FLOW CHART 1 Page 10 | FLOW CHART 2 Page 15 | FLOW CHART 3 Page 24 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The aim of social studies education is achieved through learning in FIVE STRANDS with two achievement aims for each strand, two achievement objectives for each strand at eight levels and one set of indicators for each achievement objective. | The aim of social studies education is achieved through learning in THREE PROCESSES sharing one achievement aim with one achievement objective for each process and four sets of indicators each covering two levels for each achievement objective. | Students use the Social Studies Processes which draw on the essential skills to develop knowledge and understandings in the Social Studies Strands through the Settings and Perspectives and through Essential Learning about New Zealand Society and achieve the Aim of social studies education. |

Figure 11: *The Relationship between Curriculum Elements as set out on three pages of Social Studies in the New Zealand Curriculum (Ministry of Education, 1997)*

Alignment problems are immediately apparent. For a start, the first two flow charts read in reverse order to the third – the first two from the aim to the curriculum elements; the other from the elements to the aim. The more appropriate order could be debated but the point here is that they are different.

The content within each flow chart is also different. In the first, the aim is achieved through the Strands (that is, the knowledge component of the curriculum); in the second it is achieved through the Processes; while in the third it is achieved through *both* the Processes and the Strands plus three new elements (the Settings and Perspectives and *Essential Learning about New Zealand Society*). The stated aim of social studies in the curriculum is to “enable students to participate in a changing society as informed, confident and responsible citizens”. This aim emphasises action (“to participate”) based on knowledge. The third flow chart in Figure 11, therefore,

expresses the relationship between Processes (actions) and Strands (knowledge) in a manner that is aligned to the curriculum intention. This flow chart, however, is undermined by the previous two which suggest different relationships between content and process.

There is a further design feature that embeds the misalignment of content and process. The third flow chart in Figure 11 states that the Processes “draw on the essential skills to develop knowledge and understanding in the social studies Strands”. In other words, skills facilitate the pursuit of knowledge. The stem for each Process achievement objective, however, is that “*students will demonstrate skills* [italics added]” as they carry out the process of inquiry, values exploration and social decision-making. In other words, the achievement objective emphasizes the development of skills *for their own sake* while the summary diagram emphasizes their utility in developing understanding of the knowledge achievement objectives. The Process achievement objective stem effectively separates knowledge and skills from each other in a manner not intended by the curriculum but at the level of detail most likely to be implemented by teachers. The Education Review Office (2001) report on social studies confirms this is exactly what is happening. The report comments that “some teachers do not integrate... [strand and processes] when planning... They seem unaware that both are dependent upon each other...”(Education Review Office, 2001, p. 1).

This problem of effectively disconnecting the Strands and the Processes has generated a further misalignment. In spite of the espoused participatory aim of the curriculum the knowledge strands are defined by largely static achievement objectives. Their static nature is reinforced by the fact that each achievement objectives is further defined by a set of “indicators” that illustrate how the achievement objectives could be met. The indicators, however, use only four verb stems – “give examples of...”, “identify...”, “describe...”, and “explain...” These verb stems are consistent with the outcomes-focus imposed on the curriculum but they reinforce the knowledge component at the expense of the investigative, inquiry component that is more clearly

connected to the participatory aim of social studies. Furthermore, as the experience of earlier curriculum showed, the more refined the level of definition the more teachers will latch onto this detail in implementation. The Education Review Office's observation in this regard is interesting as well noting as they do that in many cases the indicators "do not link very well with the achievement objectives" and that they have become a "distraction". While well motivated from the point of view of clarity, progressive refinement of content can prove problematic if not aligned to intent.

Alignment and Potentially Conflicting Purposes

The alignment problems in the 1997 curriculum are not just a consequence of inconsistent expression of ideas between one part of the document and another. Serious as these are for coherence and sense-making there is a more fundamental level at which the 1997 design creates coherence problems. The curriculum includes 44 "separate meaning chunks" related to purpose (Table 2, p.95). These cover virtually all aspects of the past expressions of social studies and most common conceptions of the subject. In order to acknowledge these multiple purposes, the design creates an eclecticism that seriously jeopardises its overall coherence.

National curriculum policy required that all curriculum statements should adopt an outcomes-focused approach. Each statement was required to describe achievement objectives at eight progressive levels of achievement and to classify these objectives by "strands" that defined the general content structures of the subject. Given these constraints it is not surprising that the design of the social studies curriculum was dominated by the five strands – social organisation; culture and heritage; place and environment; time, continuity and change; and resources and economic activities - and their 90 associated achievement objectives. What was problematic, however, was that the design, in attempting to achieve three other purposes, did not align these to the dominant and mandated outcomes-focused design.

Representing the process purpose

The point has already been made that the aim of social studies as stated in the 1997 curriculum was a participatory one. The curriculum design attempted to reflect this by including three teaching and learning processes – inquiry, values exploration, and social decision-making – that each reflected an active approach to learning. The curriculum exhorted, and illustrated (Figure 12), the “inextricable” links between these Processes and the content requirements of the Strands achievement objectives but not only did the various misalignments described in the previous section inhibit this integration but a significant contradiction in design also made the links more difficult to achieve.



Figure 12: Curriculum Diagram Illustrating Links between Content (Strands) and Processes (Ministry of Education, 1997, p8)

As the discussion in Chapter 2 explained, Stenhouse (1975), one of the main advocates of process-based curriculum, argued that learning processes such as the three listed above cannot themselves be “levelled”. What makes them more or less difficult is the content to which they are applied. The curriculum used, as mandated, the Strand achievement objectives to define this progression of content. The confusion arose because the design, rather than simply describing the processes as “principles of procedure” (Stenhouse, 1975) that applied to all the achievement objectives at all levels

of the curriculum, attempted, in a physically separated section of the text, to also develop progressions *within* the processes. This created two problems. Firstly, it created artificial progressions that were difficult to understand and justify. It was difficult, for example, to understand what made the Level 5 and 6 requirement to “collect and record information from a range of primary and secondary sources” any more difficult than the Level 3 and 4 requirement to “collect and record information from a range of sources”. It was also difficult to understand why at Levels 5 and 6 it was not longer necessary for students, as part of the values exploration process, to “explain why people hold different values positions”. Secondly, and more importantly from an alignment perspective, it inhibited the possibility of achieving the simple integration of processes and strands that could have been achieved by preceding each achievement objective with a statement such as “Students will use the processes of inquiry, values exploration and social decision-making to develop understanding of” Achieving the integration sought by the curriculum in the absence of such a statement was clearly a source of difficulty for teachers. The Education Review Office (2001) commented that “some teachers ... seem unaware that both (the Processes and the Strands) are dependent on each other for successful implementation” (p. 2). Attempting to represent an important curriculum element in a manner that is not consistent with its nature created a level of contradiction and confusion that could have been avoided had the design logic advanced by Stenhouse been followed.

Representing the “knowledge about New Zealand” purpose

The 1997 curriculum placed a strong emphasis upon learning about New Zealand society. Rather than integrating this aim within the outcome-based focus of the curriculum (that is, the Strand achievement objectives) a new element was introduced. This was referred to as *Essential Learning about New Zealand Society*. The way in which this was expressed posed problems for alignment and coherence.

Essential Learning about New Zealand Society was presented as a list of nineteen areas of content with no statement of outcome - for example, “Maori migration, settlement, life

and interaction in various areas of New Zealand over time”; “major events in New Zealand history”; “the physical environment of New Zealand and how people interact with the landscape”. In other words, it was expressed in the form of a prescription that implied content to be covered not unlike that developed by Hirsch in his Core Knowledge curriculum (Core Knowledge Foundation, 1999). The element of prescription was strengthened by the stem that preceded the list of content: “Students will have opportunities to develop their knowledge and understanding about New Zealand society, *through studying* [italics added] ...”. This manner of expression was a direct contradiction of the outcomes-focused nature of the achievement objectives that were written to express what students should “learn” rather than what they should “study”. The effect was to imply that *Essential Learning about New Zealand Society* was somehow separate and different from the achievement objectives.

There is evidence that teachers were uncertain about implementing this curriculum element. Hunter (1999) reports that pre-service teachers found the *Essential Learning about New Zealand Society* section of the social studies statement daunting and unspecified. A report on the state of readiness of New Zealand schools for implementation of the social studies curriculum identified *Essential Learning about New Zealand Society* as one of four areas with which schools were having difficulty (Samu, Peddie & Rubie, 1999). The report cited such comments as “needs direction for teachers”, “lack of understanding of how to integrate into current teaching” and “teachers are just check listing: no real thought or meaning goes into it” (Samu et al., 1999, p. 46). Soothill (2004) found that the primary school teachers she surveyed were concerned about their students’ lack of knowledge about New Zealand but reflected that a teacher comment to the effect that “it’s very important ... but we haven’t done much at all” spoke for the majority of the teachers in the study (p. 24).

There is a certain irony that some of this uncertainty could have been avoided. This element, referred to in its title as *learning*, had much more in common with the levelled and outcomes-focus of the Strands than did the Processes, and yet it was the Processes

that were forced inappropriately, and to the detriment of their clarity and implementation, into such a framework while *Essential Learning about New Zealand Society* was not.

Representing the “commitment to social justice” purpose

The 1997 curriculum expressed commitment to such principles as social justice, the welfare of others, acceptance of cultural diversity and respect for the environment. While these principles were partially acknowledged through some of the designated achievement objectives they were also given expression in yet another curriculum element entitled “Perspectives”. Five Perspectives were prescribed – bicultural, multicultural, gender, current issues and perspectives on the future. Worthy as these were, their representation illustrates further problems of design coherence.

The Perspectives were a mix of outcomes (“students will understand the nature of biculturalism and the partnership between Maori and pakeha”), processes (“practise creative problem solving”), content selection guidelines (“examine issues related to racism”), and general advice on teaching practice (“use inclusive language”). The stem leading into these requirements informs teachers that they “are integral to a balanced programme in social studies.” The difficulty from the design perspective, however, is that the mixed nature of their expression inhibits the very integration the curriculum espouses. Because they were neither entirely consistent with the achievement objectives, nor the Processes, nor *Essential Learning about New Zealand Society*, their applicability was not immediately apparent. It was left to the teachers to make sense of their eclectic expression and of their integration with the other elements of the curriculum.

Design as a compromise

The design difficulties in the 1997 curriculum, associated with the attempt to express multiple purposes, are best understood by considering the influences on the process of developing this curriculum. This history has been well documented (for example, Hunter and Keown, 2001; Mutch, 1998/1999, 2004; Openshaw, 2000) but the major

difficulty was that the curriculum faced pressure, on the one hand, from conservative elements (for example, Education Forum 1995, 1996) to demonstrate a much stronger commitment to traditional history and geography knowledge, and, on the other hand, from some within the social studies community to represent a more inclusive, social justice perspective than either of the two previous drafts of the curriculum had provided (for example Harrison, 1998; Smythe, 1998). The prescriptive *Essential Learning about New Zealand Society* section of the curriculum can be seen as an acknowledgement of the conservative voices; the eclectic Perspectives section, as an acknowledgement of the liberal views. From a design point of view, however, these representations, especially within the curriculum that was necessarily dominated by an outcomes-focus, present contradictions and a lack of coherence that compounds sense-making. In attempting to achieve compromise, and to avoid further conflict and resistance, the curriculum incorporated multiple ideas but basically left it to teachers to sort these out. As Kelly has observed, to represent within a curriculum approaches that are not transparently compatible, is “to deny teachers the advantage of clear advice and a conceptually sound base for the realities of their practice” (Kelly, 1999, p. 82).

Conclusions

The analysis reported in this chapter illustrates the coherence difficulties that arise when the purposes of a subject are not clearly defined and integrated in curriculum design. A major design problem in New Zealand social studies has been the failure to express clearly the relationship between multiple purposes. These purposes have either been re-expressed in slightly different ways in separate sections of the text creating subtle shifts in meaning, or they have been represented by a disconnected form of expression that fails to make transparent the relationships between purposes. This disconnected expression is characterized by sentences that incorporate multiple purposes but that do not use connectives to link them, and by altered sequencing of purposes between different sections of the design that imply differing relationships. While lack of explicit connections between purposes may not be a problem for a more

mature subject, it is a significant barrier to sense-making in social studies because there are no clear external reference points that define the nature and purposes of the subject. Its meaning continues to be strongly debated nationally and internationally. Furthermore, there is a limited pool of teachers within both primary and secondary schools for whom social studies is their major curriculum priority. They make sense of curriculum through a limited lens of background knowledge and experience and this inhibits their ability to understand the connectedness of purpose that the designs espouse but do not themselves achieve.

While the expression of purpose within most of the curriculum designs has been unclear, at the structural level curriculum coherence has supported sense-making. Curriculum principles regarding content selection and teaching approach have been matched by a general structure that reinforces these principles. The difficulty has been that at the level of design detail this alignment and coherence has unravelled. This has happened through the provision of examples that draw attention towards themselves and away from the more general requirements. The examples are not necessarily inconsistent with the general requirements but they have been disconnected from them by being given independent prominence. Problems of coherence have also arisen with the use of summary statements and diagrams that have either been internally inconsistent or that are inconsistent with the detail of the curriculum. Mismatch between detail and general requirements is a relatively common pattern¹⁷ that reinforces the care that needs to be taken in expressing detail in a way that is clearly and transparently aligned to intent. Given that this detail is often closest to the practice of teachers and is, therefore, very influential in implementation, any incoherence with purpose inevitably weakens curriculum intent. Likewise, incoherence associated with eclectic design compromises the likelihood that teachers will understand the significance and role of individual curriculum requirements. As a result they are drawn either to those that dominate the curriculum (for example, the 90 Strand

¹⁷ Peddie (1990) observed a similar pattern in his analysis of Six Form Certificate French. Three significant features of the general aims - offering students a positive and enjoyable experience, using this experience to gain a greater knowledge of themselves, and fostering a desire for further language learning - disappeared in the more specific expression of objectives (p. 42-43).

achievement objectives in the 1997 curriculum) or to those that are most consistent with their own view of the purposes of the subject. Without careful and coherent design no manner of exhorting teachers to follow general principles or guidelines will be effective unless, at the level of implementation detail, there is full and transparent alignment to that which is espoused in the curriculum principles.

CHAPTER 6

Design and Complexity

Curriculum design by its very nature has an inherent level of complexity arising from the expression of multiple and related elements: namely, purpose, content, teaching approach and assessment. Although curriculum design sets out to establish alignment between these elements, the previous chapter has illustrated that this has seldom been achieved in New Zealand social studies. This has the potential to add to the inherent complexity of the curriculum, as implementing agents attempt to make sense of apparently contradictory elements. This potential is likely to be enhanced when the curriculum design attempts to maximize implementation flexibility because flexibility increases choice which in turn increases decision-making possibilities. If decisions are to be congruent with curriculum intention then flexibility adds pressure to the sense-making because the implementing agents not only have to make sense of simultaneously interacting elements *within* the curriculum but they also have to integrate these with resources from *beyond* the curriculum that may or may not be well-aligned to the curriculum intention.

This chapter examines the patterns of flexibility within the four social studies curriculum designs and their implications for sense-making, particularly the potential cognitive load they have placed on teachers. The nature of this cognitive load is examined in detail with reference to a case study from the 1997 curriculum. The consequences of strategies that teachers have taken to minimize high cognitive load are also discussed.

The Changing Patterns of Flexibility and their Complexity Implications

The 1942 curriculum restricted overt prescription on the basis that the subject was new nationally and internationally and that, as a consequence, it would be “disingenuous to

suggest that all, or nearly all, of the peculiar teaching problems [social studies] present[s] have been solved". In place of prescription the curriculum offered "general principles that must be respected" and recommended that "schools should be free within wide limits to make their own decisions as to the scope, content and organization of the social studies course".

The 1961 curriculum was similarly encouraging about flexibility but justified it on a different basis. This design emphasized the need for teachers to "adapt the programme to the needs of their children and to the resources at their command". The curriculum went on to suggest that a "very different purpose from that suggested" could be implemented "provided that it satisfies the aims of the syllabus". The 1981 *Education Gazette* statement clarifying the 1961 curriculum made some attempt to reign in this flexibility by setting out principles based on "current school practice" and by providing examples of "contexts for study". Nonetheless it was stated that there was "no prescriptive list of these contexts" and that teachers and students should "focus on those which relate to the resources available, including the children's experience". Thus flexibility was justified, not just on the basis of student needs and interests, but also on the pragmatic basis of resource availability.

The 1977 curriculum made a feature of its non-prescriptive nature with the Director-General of Education commenting in the Foreword that:

the prescriptive element has been kept to a minimum. The intention is that teachers will devise school programmes that are, as far as possible, adapted to local circumstance and to the needs of their students. To underline this intention, the statement that follows is, as the title implies, to be taken as a syllabus guideline (Department of Education, 1977, p. 3).

Consistent with this intention the document listed Important Ideas that "could" become part of students' thinking. These ideas were recommended as "guides" to the selection of content and it was acknowledged that "other ideas... may also emerge". The "Studies" in the curriculum were only "recommended" and the examples

supporting these were prefaced with a comment that “examples other than those listed should also be considered”.

The 1997 curriculum was less overt about teacher flexibility. In contrast to the *Foreword* in the 1977 curriculum it was explained in the *Foreword* of this document that the curriculum provided “a clear indication of the Ministry of Education’s expectations for students’ achievement in social studies from Year 1 to Year 13”. Within the detail of the curriculum, however, considerable flexibility was offered. Teachers were free to choose how, or whether, they would apply the Processes, the Perspectives and *Essential Learning about New Zealand Society* to individual achievement objectives. The achievement objectives themselves were written in an open manner and even though “indicators” were provided for each achievement objective it was explained that these indicators only illustrated how the achievement objectives “could” be met and what students “may come to know”. The concepts inherent in each of the achievement objectives were also not considered to be definitive. A further list of 130 concepts, “reflected in the five strands of this curriculum statement”, was provided in a separate section of the document with teachers encouraged to “add to [this list] as appropriate”. The appearance of prescription via achievement objective, therefore, was largely just that: in reality, teachers were largely left free to develop understanding of the achievement objectives in relation to contexts and content of their own, or their students’, choosing.

There was, however, one notable point of difference in the flexibility provisions of the 1997 curriculum: a difference that has significant implications for complexity. While all previous curricula had included implementation guidelines none of these were stated as requirements. The 1997 curriculum, however, surrounded flexibility with a set of requirements that, while not determining content and context for any *particular* achievement objective, did demand an overall level of accountability based on the need to achieve a “balanced programme”. The curriculum stated that the Processes had to be integrated with the Strands, New Zealand “settings” had to be incorporated each year, and teachers had to develop a balanced programme that included *Essential*

Learning about New Zealand Society. Within any two-year period, planning needed to include a balance of Perspectives (bicultural, multicultural, gender, current issues and perspectives on the future) and over the same period students had to have learning experiences in each of the defined settings beyond New Zealand (the Pacific, Europe, Asia, Other and Global). Thus *overall* freedom and flexibility was constrained by certain accountabilities. Teachers could study what they wished but over time they had to demonstrate that they had addressed particular requirements. This reflected a compromise between two competing design pressures (Hunter and Keown, 2001): the desire to preserve a social studies tradition of affirming teacher “discretionary space” (Hlebowitsh, 2005) through an open, inclusive curriculum based on teacher understanding of the particular interests and needs their students and their communities; and the accountability and audit demands of a nationally implemented curriculum across all schooling levels and across seven essential learning areas.

What this compromise marked, however, was a significant shift in the complexity of curriculum decision-making. The “guidelines” for content selection were certainly complex in each of the three previous curricula, particularly the 1977 curriculum that encouraged the integration of multiple aspects such as theme, basic question, important ideas, inquiry and recommended studies. But these guidelines were wrapped in a language of flexibility and choice that made them less demanding than the imperatives of the 1997 curriculum statement. Furthermore, but not intentionally, the previous three curricula gave teachers the opportunity to reduce complexity and the associated cognitive load of making connections between multiple guidelines, by providing content examples. The 1942 curriculum listed in considerable detail the content possibilities within the three major areas of learning; the 1961 curriculum included a set of broad topics across three bands of primary schooling and, within these, details of the types of questions that might be posed and the content that might be covered; and the 1977 curriculum, at each level, specified, and highlighted in italics, examples that might be used to develop the Recommended Studies. While these content inclusions, and the supporting detail, were often not well aligned to the more generally stated purposes of the curriculum, their very presence provided the

opportunity for teachers to opt out of the cognitive demands of integrating multiple elements. By focusing on the examples provided by the curriculum writers, and with less accountability in terms of “requirements”, it was possible to assume that by implementing the examples, the curriculum intent was itself being implemented – an assumption that was often flawed in implementation as the Recommended Studies increasingly assumed the status of “topics” and were supported by published resources. As explained in Chapter 4 it was common practice for those of us teaching in secondary schools following the introduction of the 1977 curriculum to teach such textbook based topics as Western Life in Village Samoa (Masterman, 1977), Samu’s India (Leadley, 1971) and Victorian England each of which was derived from the suggested examples in the curriculum, but each of which bore little resemblance to the curriculum focus on inquiry and the development of important ideas about human behaviour. Flexibility, therefore, was replaced by a form of willingly undertaken *de facto* compulsion based on published resources and sourced in teacher desire to reduce complexity and make sense of implementation.

The 1997 curriculum was, in theory at least, much more cognitively demanding because there were no specific examples included that teachers could latch onto, which if implemented, could be claimed to be representative of intent, and the requirements within the curriculum were framed in language that was more stringent, and that could be audited.

The next section of this chapter uses a case study to examine in detail the nature of the complexity posed by the competing pressures of flexibility and accountability within the 1997 curriculum and its implications for cognitive load.

Sense-making About What to Teach in the 1997 Curriculum – The Case of New Zealand’s National Identity

The need to simultaneously integrate multiple elements imposes a cognitive load on sense-making. As the discussion in the first part of this thesis explained, this load comprises a component that is intrinsic (the inherent difficulty of the task defined by the amount of new information needing to be understood and the extent of element interactivity) and a component that is extraneous (the way in which the task is represented). Sense-making is inhibited when total cognitive load is greater than the working memory capacity of the individual undertaking the task. Because intrinsic cognitive load is fixed, sense-making in these circumstances can only be enhanced by reducing extraneous cognitive load – in other words, by improving the representation of the task; in this case the curriculum design. These principles are examined by applying them to the decision-making flexibility, and the accountability constraints, surrounding one achievement objective in the 1997 curriculum.

The Curriculum Context of the Case Study

The predominant concern of teachers in interpreting curriculum is working out what they have to teach. As a result they focus on the detail of what they have to teach and accord priority to the particular at the expense of the general (Eisner, 2000; Fernandez & Ritchie, 2003). In the case of the 1997 curriculum, the knowledge and understanding achievement objectives are the “particular”, dominating the curriculum as they do by virtue of their outcomes-focus, their volume and their location; the remaining curriculum requirements, in the form that they are stated and in their position and prominence in the document, are the “general”.

At Level 5 of the curriculum one of the achievement objectives in the Culture and Heritage strand states that “Students will demonstrate knowledge and understandings of ways in which cultural and national identity develop and are maintained”. The achievement objective is usually addressed with students in Year 9 or 10 (13 and 14

year-olds)¹⁸. This case study examines the decision-making requirements surrounding the teaching of the concept of national identity as represented within this achievement objective. This concept is selected for study because it is set within a level of the curriculum with which this writer has more than 20 years classroom experience; and because, irrespective of the conception of social studies to which a teacher most closely adheres, national identity, even though understood and expressed in very different ways, is an important concept within the subject. The concept is also selected because it is multi-disciplinary and, therefore, illustrates links to the social sciences and humanities, and because it is contentious and illustrates the way that the subject addresses competing values and perspectives. It also appears that aspects of the concept are not well understood by Year 8 students: the year level immediately preceding the level at which this concept is most commonly taught (Flockton and Crooks, 1998, 2002).

In 1998, the Ministry of Education published a handbook to support teacher implementation of the curriculum. This handbook, across a two-page spread (p. 10-11), presented a diagram identifying the curriculum elements that teachers had to consider in deciding what to teach. At the culminating point of this diagram there is a box based upon the "Assessment" and "Reporting and Recording" sections of the curriculum (p. 28) entitled "Specific Learning Outcomes". These outcomes are intended to incorporate the "knowledge, understandings and skills" that "organize and guide learning activities", to "state the learning that is expected to occur" and to "signal the expected level of performance through assessment benchmark criteria". In other words, the box signals the ultimate level of detail to which a teacher is required to plan. In order to reach this point, the diagram identifies eleven curriculum elements that teachers needed to consider. These elements are summarized in Figure 13.

¹⁸ As explained in Chapter 4 this is not the curriculum intention. In theory this achievement objective could be taught to students at any level of schooling but in practice it is taught, in effect, as a topic at Year 9 or 10.

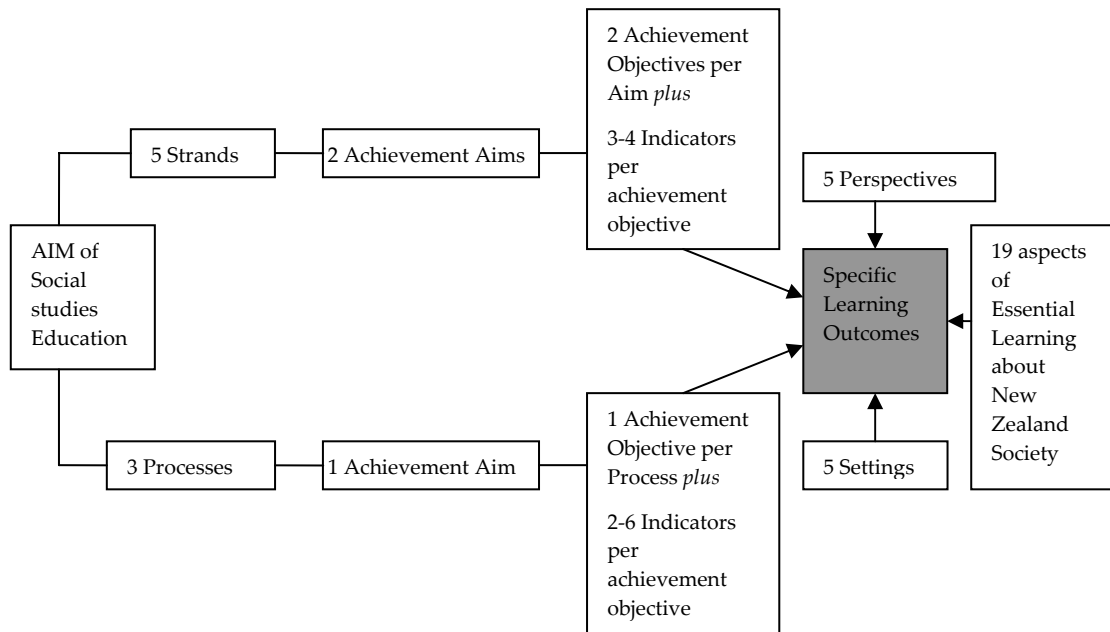
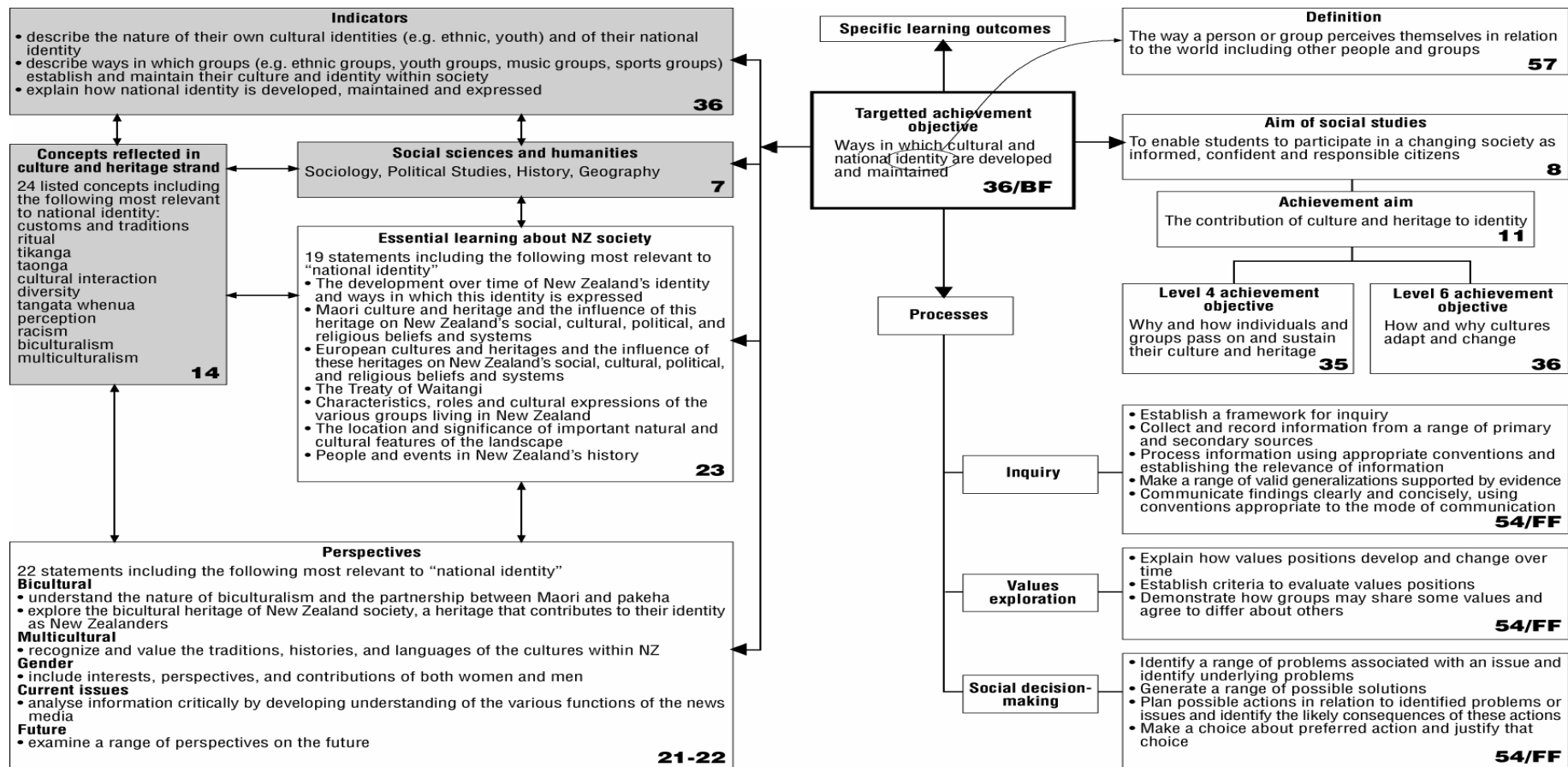


Figure 13: Summary of Curriculum Structure and Requirements as Described in the Handbook supporting the 1997 Curriculum (Ministry of Education, 1998, p.10-11)

Figure 13 gives some idea of the intrinsic cognitive load associated with teacher decision-making. The sheer number of factors that need to be taken into account imposes a high load. Miller (1956) demonstrated that working memory has a capacity of 7 plus or minus 2 elements. Even given that the twelve separate elements in Figure 13 could be grouped more than is illustrated to “stretch [the] informational bottle neck” (Miller, 1956, p. 96) the number of elements is still at the limit of working memory. It is also true that once a teacher has selected an achievement objective (such as the national identity one considered here) the number of considerations reduces. This, however, does not necessarily reduce cognitive load. First, the information presented in Figure 13 takes minimal account of interactions between elements and secondly the diagram excludes some important considerations expressed in the curriculum. The 1997 curriculum begins with the statement that “social studies is the systematic study of an integrated body of content drawn from the social sciences and humanities”. This positions the disciplines as strong informants of content and yet there is no specific reference to these disciplines in the summary diagram in the handbook. There is no reference either to the list of 130 concepts that teachers are encouraged to use in their planning. The curriculum also claims to set out a “clear and

structured progression of achievement objectives that span all levels of schooling” and draws attention to the idea that “students of the same age could be working towards achieving objectives at different levels within and across strands”. These statements imply that a Level 5 objective such as the one examined here cannot be considered independent of the Level 4 objective that precedes it, nor the Level 6 objective that follows it. The curriculum also encourages teachers to view the Strands as being “integrated” meaning that teachers also need to be alert to the presence of related objectives in the same strand, and in the other strands of the curriculum.

The specific nature of the curriculum considerations for the teaching of the concept of national identity at level 5 is illustrated in Figure 14. This integrates the elements depicted in Figure 13 (p. 149) with the additional considerations discussed in the preceding paragraph. As such it outlines a fidelity of implementation perspective (Fullan & Pomfret, 1977); in other words, what it would mean to implement the curriculum as intended. The cognitive load associated with this perspective is considered by examining in turn the intrinsic and extraneous components of this load.



Note: the numbers in the corner of each box are the page numbers of the curriculum document on which the information is found – FF means Front Flap; BF means Back Flap).

Figure 14: Specific Curriculum Considerations associated with Teaching the Concept of National Identity

Intrinsic Cognitive Load

Intrinsic cognitive load is a function of the quantity of information that needs to be acquired and brought into schema and of the extent to which understanding can only be developed by considering multiple elements simultaneously (Cooper, 1998). As Figure 14 illustrates the decision-making that is required to teach the concept of national identity involves both the quantity and the interactivity components of task difficulty. The main dimensions of this complexity are described below although the order of presentation should not imply that teachers necessarily need to make decisions in this sequence.

Determining the meaning of the achievement objective

The teacher needs to understand the nature of the concept at the heart of the achievement objective. The main curriculum sources for this are the definition of “identity” included in a glossary section of the document, the indicators which show “*as a group*” [italics added] how the achievement objective might be met, and the additional list of 24 concepts that the curriculum highlights as being reflected in the Culture and Heritage strand within which this achievement objective is located. The emphasis on the phrase “as a group” and the provision of 24 possibly relevant concepts means that interactivity exists not only between curriculum elements but also within them. This can be illustrated by examining the detail of the process of sense-making that needs to take place as teachers consider these elements.

The indicators suggest that national identity needs to be considered in relation to three main ideas – its expression, its development and its maintenance. In reality these ideas are not independent of each other. For example, the manner in which identity is expressed can influence its maintenance and development. If it is expressed in a way that alienates particular groups of people within a nation then its very existence may be denied and its maintenance consistently challenged. Similar issues may also arise if its expression is so inclusive that it fails to capture any overall sense of commonality or

coherence. Even where national identity is identifiable and shared it is not static. It evolves as its forms of expression change to reflect changing values and beliefs.

Interactions between the ideas inherent in the indicators are further complicated when teachers consider the list of 24 related concepts. Concepts relevant to the expression of national identity include “customs and traditions”, “ritual”, and in New Zealand’s case, “tangata whenua”¹⁹ and “taonga”²⁰; those related to the development of national identity include “perception” and “cultural interaction”; while the concept of “beliefs”, “stereotypes” and “racism” inform understanding of the maintenance of national identity. These concepts also interact with each other. National identity is expressed and maintained through rituals but growing cultural interaction resulting from migration can mean that ascribing a national identity to such rituals perpetuates increasingly less inclusive stereotypes that may be perceived by some as evidence as racism. Other such examples could be developed but the essential point is that making sense of these curriculum requirements is cognitively demanding because of the need to consider a large number of concepts and to simultaneously consider the interactions between them.

Determining the contribution of the related disciplines

A further level of complexity is added when the role of the social sciences and humanities is considered. The curriculum claims these to be the source of “integrated content”. This means that teachers are required to understand multiple disciplinary perspectives on the concept, or concepts, they are teaching. While national identity may appear to be simple and unproblematic, and at a symbolic emblematic level it probably is, there is much more to the concept than this popular view. The type of conceptual connections described above presuppose an understanding that goes beyond the superficial and that draws on understandings of the concept from such disciplines as history, sociology, political science and geography.

¹⁹ Maori term for indigenous people – literally means “people of the land”.

²⁰ Maori term for “treasures”.

This is no straightforward matter. The disciplines introduce a vast array of ideas to the understanding of national identity. By adapting Miller's (1995) five-dimensional framework for the concept it is possible to capture many of these ideas. Each component of the framework is described briefly below and the relationships between the detailed elements of the framework are represented schematically in

Figure 15 (p. 157)²¹.

1. National identity is founded on the mutual recognition of shared beliefs or what Anderson (1991) refers to as an image of "deep, horizontal comradeship" (p. 7). These beliefs do not easily lend themselves to empirical testing because they are often "hidden away in the deep recesses of the mind, brought to full consciousness only by some dramatic event" (Miller, 1995, p. 18).
2. National identity embodies historical continuity. This continuity establishes the comradeship to which Anderson refers and develops a sense of obligation that stretches back across generations. It is based on interpretations - sometimes accurate, sometimes artificial and politically motivated - of the past endeavours of individuals (for example, in New Zealand's case, Kate Sheppard, Sir Edmund Hillary and, most recently, Sir Peter Blake) or of past events, including both successes (for example, the Liberal government of the 1890's, the welfare state, New Zealand's anti-nuclear stance) and 'heroic' failures (for example, the defeat of the 1905 All Blacks by Wales; Gallipoli, the Rainbow Warrior). The foundation myths of a nation emerge from these interpretations as values are extracted, reiterated and endorsed (for example, New Zealand as a brave and independent nation). The values emerge through debate and discussion; through incidental dissemination via 'high' culture (art and literature) and 'low' culture (pop stars, advertisers, sport)

²¹ The description in this section uses Miller's (1995) organising framework but it integrates elements from a series of interviews conducted with academics working in the area of national identity. In so doing it adds details that are not included in Miller's original explanation. The diagram (Figure 15, p. 157) draws on the same range of sources. There has been no attempt made to acknowledge the particular disciplinary origin of the ideas presented here because of the fluid nature of the boundaries between the disciplines when considering a concept such as national identity. Thus, while the concept of an evolving national identity might commonly be attributed to history it also includes elements of political science (changing constitutional arrangements) and geography (immigration and settlement patterns).

(Edensor, 2002); and through deliberate and overt imposition (for example, patriotism around the America's Cup). Thus national identity post-dates the development of mass communications (Anderson, 1991) and depends for its sustenance, at least in part, on the "agencies of popular socialisation" (Smith, 1991, p. 11).

3. National identity is active. It emerges through the decisions (good or bad) that the nation makes and it evolves as new forces (for example, changing conceptions of the relationship between Maori and pakeha, and between New Zealand and Britain; immigration; and technological change) impinge upon the nation. Because it is not ethnically-bound, national identity can accommodate different ethnicities, languages and cultures. As Miller (1995) explains, however, the coexistence of ethnicity and nationality comes under pressure "where an ethnic group finds its identity being threatened or its legitimate political aspirations being denied" (p. 21). Hence the need to understand the potential existence of nations within states and the error of conflating 'nation' (the community aspiration to be politically self-determining) and 'state' (the set of public political institutions that exercise control in a given territory) (Miller, 1995; Smith, 1991).
4. National identity is a spatial, territorial concept in the sense that the nation is limited by the finite boundaries beyond which other nations lie (Anderson, 1991), and in the sense that it is a homeland – a sacred place for use of its citizens and not to be exploited by outside interests (Smith, 1991). It is also a highly visible and obvious source of distinctiveness – the nature of the landscape can perpetuate foundation myths (for example, New Zealand's mountains, rivers and lakes and the 'clean, green' image), and inspire the values that people come to hold (for example, the pioneering, adventurous, outdoor spirit) (Bell, 1995). While the stability and homogeneity of place is reduced by communications technologies that compress time and space, and by globalisation, for reasons of protection of interests and tangible distinctiveness, the territorial boundaries of the nation still exert a strong influence on identity.

5. It has a common public culture that is not monolithic and all-embracing but that is nonetheless distinctive. This distinctiveness is seen in its institutions that codify the rights and duties that exist between a nation and its members. It is also seen in the dense web of customs, practices and implicit understandings (social norms and cultural ideals) and in the symbols (flags, anthems, uniforms, monuments) and festivals that the nation embraces.

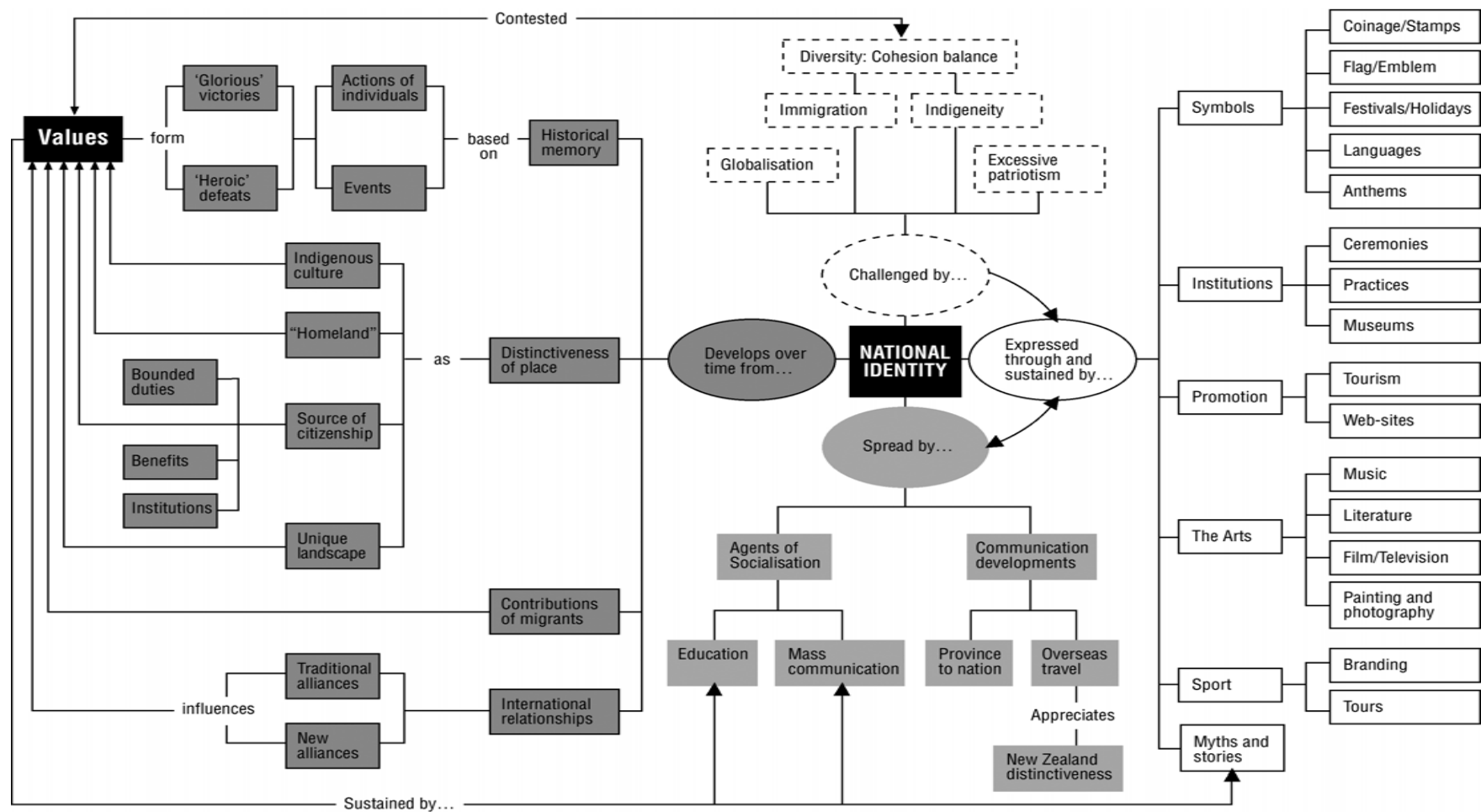


Figure 15: Concepts Related to National Identity

This brief summary account of national identity and the interactions inherent within a full understanding of the concept give a sense of the cognitive challenge that teaching this concept poses for teachers. It is a complex concept that itself incorporates many complex and contentious issues. Furthermore, although Miller's framework does not imply as such, it is also a concept whose validity as an organising idea has been challenged. This challenge, originating largely from historians, is based on the view that a focus on national identity such as that required by the curriculum can lead to a sometimes excessive preoccupation with the quintessential essence of national identity to the exclusion of other more dramatic, personal, inclusive and coherent historical narratives²². Thus the cognitive challenge associated with complexity is magnified by doubt. It is further magnified when it is considered that most secondary teachers have a background in only one of the disciplines that contributes to the ideas suggested here. Perhaps the time has come to heed Cumberland's (1950) prescience that the integration of the social sciences as intended by the curriculum "makes an almost impossible demand on our secondary school teachers" (p. 17) or to heed the less charitable view that he attributes to Ellsworth Huntington: "thinkers pause where ... teachers plunge without fear" (p. 17).

Determining context

Teachers need to make decisions about the context within which the conceptual understandings required by the achievement objective are developed. This involves the selection of "settings" from a set of six broad areas of the world and "perspectives" from five possible clusters. If teachers choose to focus on New Zealand as one of the settings, they also need to consider the 19 "essential areas of learning about New Zealand society" listed in the curriculum and the way in which these connect to the achievement objective. In the case of national identity, this selection appears relatively straightforward given the inclusion among the 19 areas of essential learning of "the development over time of New Zealand's identity and ways in which this identity is expressed". The discussion in the previous sections, however, illustrates that national identity also connects with other items in the list of essential learning such as Maori

²² Based on interviews with historians carried out as part of this study.

culture and heritage, colonisation, European culture and heritages, the Treaty of Waitangi and immigration. The apparent simplicity of the single identity statement becomes much more complex when considered alongside these other areas of essential learning. There is a similar level of complexity when considering the Perspectives because each of them – bicultural, multicultural, gender, current issues and perspectives on the future – is relevant to considerations of national identity. If teachers are to make more than a token acknowledgement of the role of these Perspectives they have to select, from among 22 statements, those that are of particular relevance to identity (see Figure 14, p. 151).

Determining progression

While decision-making about Settings and Perspectives poses a complexity associated with the *quantity* of considerations and the *relationships* between these considerations, a further level of complexity is added by the curriculum requirement that teachers must ensure “balanced coverage” of each over a two-year period. This means that decision-making has to take account of previous and subsequent teaching to ensure that certain areas are not consistently missed and others consistently duplicated.

The curriculum espouses “structured progression” and encourages the accommodation of different levels of learning within the one class level. This requires teachers to consider the relationships between the selected achievement objective and the overall achievement aim; and between the achievement objectives at the levels immediately below and above the selected achievement objective. In this case the achievement aim emphasises the relationship between identity and culture and heritage; while the achievement objectives connect to the process of maintaining identity (Level 4) and to the process of culture adaptation (Level 6). In the background behind these progressions and considerations is the way that teaching about national identity connects to the overall aim of social studies – the need to enable students to participate as informed and confident citizens. Teachers, therefore, not only need to think through the nature and content requirements of the targeted achievement objective, but they also need to work out how this relates to culture and heritage and, ultimately, to

citizenship. Neither of these connections is particularly difficult but they add to the overall number of considerations required of teachers.

Determining the role of the processes

The curriculum claims that the social studies Processes are inextricably linked to the Strand achievement objectives. Teachers need to decide, therefore, which of the three Processes to apply to the development of student understanding of national identity. Because all three – inquiry, values exploration, and social decision-making - are relevant to this concept teachers need to understand how these Processes might interact. For example, if a teacher chooses to focus on national identity as a contentious “issue” (social decision-making) the students will presumably need to examine this issue by collecting relevant information (inquiry) at least some of which will be related to competing values positions (values exploration). Any “resolution” of the issue (social decision-making) will inevitably create disagreement and controversy (values exploration) which can only be predicted through data collection about responses to controversy (inquiry).

This consideration of intrinsic cognitive load might seem to be pedantic, reflecting an obsessive compliance mentality. While it is certainly true that it has examined every possible detail and connection, it is an accurate reflection of the *stated* intentions of the curriculum. As already explained, the curriculum places a premium on teacher flexibility within a broad regulatory framework. The quantity and complexity of decisions described above is the consequence of this curriculum structure: as long as flexibility is valued, and accountability required, such complexity is almost inevitable. This need not necessarily matter of course if the curriculum design is effective in limiting the extraneous cognitive load associated with the representation of this complexity.

Extraneous Cognitive Load

The extent to which the curriculum design adds to the cognitive load of interpretation can be evaluated by considering the factors, identified in Chapter 2, that influence extraneous cognitive load.

Spatial contiguity and discontinuity

Each box in Figure 14 (p. 151) records the page number where the relevant information is found in the curriculum. The “indicators” are contiguous with the achievement objective and are thus integrated by the positioning in the document. The spatial discontinuity between the achievement objective and the other curriculum elements, however, is generally very high. To attend to the detail of these elements teachers need to refer to 16 separate pages spread across the 58 page text. As Mayer and Moreno (2003) have explained, this search process overloads the limited capacity of working memory and, as a consequence, draws mental energy away from understanding the meaning and significance of the curriculum requirements. The demands of this search can be reduced using diagrams that illustrate how discontinuous elements connect (Cooper, 1998; Sweller et al., 1998). The curriculum makes some effort at this by summarising the structure in the form of a single flow diagram. While this may help teachers to find a way through the *sequence* of connections they need to make²³, it omits some requirements (concepts and connections to the disciplines) and it does not reduce the need to search out the scattered detail when it comes to making sense of requirements at the level of unit planning.

Shifts in meaning

A further factor that increases extraneous cognitive load is the way that the language of the disparate requirements sometimes shifts meaning. The achievement objective refers to the “development” and “maintenance” of national identity. The indicators that are designed to clarify the achievement objective introduce the ideas of “establishing” and “expressing” national identity. “Establishing” is similar to

²³ As explained in the previous chapter there is some doubt about the value of this diagram given its lack of alignment with two other diagrams in the curriculum.

“developing” but it has less of a sense of evolving identity. “Expressing” is implied in “maintenance” but it may also be considered independent of this concept. The related *Essential Learning about New Zealand Society* requirement emphasises the “development” and “expression” of national identity but excludes reference to its “maintenance”. The achievement aim is concerned with the “contribution of culture and heritage” to identity, while the list of strand-related concepts introduces further possible ideas such as “rituals” and “stereotypes”. The explicit connections between these different emphases on the concept of national identity are not made clear in the document and nor is there any explanation of the reasons for, and significance of, the shifts in language and phrasing. Teachers are left to make their own sense of elements that are not only physically disconnected from each other but that are also different in meaning and emphasis.

The use of examples

From a sense-making and cognitive load perspective the curriculum could have minimized complexity by improving the indicators so that they more clearly exemplified the anticipated conceptual understandings. The indicators were physically connected in the text of the curriculum to the achievement objective. If it was important, therefore, to be specific about the role of culture and heritage in identity, or about the implications of “rituals” and “stereotypes”, these could have been built into the indicators in ways that informed the achievement objective and that were consistent with the objective. This, however, did not happen.

Developing better aligned and more specific indicators would not only have reduced complexity and spatial discontinuity but it would also have addressed one of the major problems Openshaw (1996, 1998) observes in the current curriculum: its failure to provide direction for teachers in relation to the contentious societal issues that are so often part of the subject. While such curriculum principles as the concern for social justice and respect for human dignity give the appearance of guidance, as Openshaw illustrates in relation to Maori land issues, these concepts could legitimately support any one of the multiple and conflicting views on this issue. This leaves “the thorny

question of topic definition and interpretation mainly up to teachers and schools” (Openshaw, 1998, p. 37) and leaves them to face the criticism and pressure that the curriculum neatly avoids. A teacher reaction to the *Essential Learning about New Zealand Society* requirement of the curriculum captures this difficulty:

You don't want to do it in a way that is either wrong or you do something insulting, and it's just because you don't know. If you did know then you would know where to go and not to go. You just feel a bit worried about how to do it (Soothill, 2004, p. 25).

As a consequence, it is Openshaw's view that

In the hands of overworked and under-resourced teachers, anxious to avoid trouble from any section of the community, the end result...is likely to be an intellectually sterile curriculum which places a premium on memorisation of achievement objectives for particular topics, coupled with the uncritical acceptance of the 'uniqueness' of Aotearoa New Zealand society, a phrase routinely repeated like a talisman to ward off not simply evil thoughts but any tendency towards critical thinking whatsoever (1998, p. 164).

The reason, therefore, that the curriculum did not provide the level of conceptual direction recommended here, related in part to the desire of the writers to avoid overt prescription, but it also related to the political process surrounding curriculum development and the desire to avoid the inevitable contention that would have arisen from more prescriptive content. Witness, for example, the experience surrounding the attempt to physically integrate concepts and contexts in the first draft of the curriculum.

The first draft of the curriculum achieved a high degree of physical integration of curriculum requirements by adopting a layout that provided lists of sample contexts and settings relevant to each achievement objective and, on the facing page, possible learning and assessment experiences along with their relationship to the achievement objective and the processes (see example in Figure 16).

| | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Culture and Heritage Level 5</p> <p><i>Achievement Objectives</i></p> <p>Using a range of skills students will demonstrate their understandings of:</p> <p>1. formal and informal agreements between Tangata Whenua and Pakeha in the past and present.</p> <p>.....</p> <p><i>Sample Learning Contexts and Settings</i></p> <p>Making and keeping agreements</p> <p>The Treaty of Waitangi · Establishing a rahui · School charters in the local schools</p> <p>.....</p> | <p><i>Sample Learning Activities</i></p> <p>EXAMPLE 1: contributing to Achievement Objective One and to Decision-making skills</p> <p>Context: making and keeping agreements</p> <p>Learning Activity: Students survey a range of people in the local community to establish their knowledge and understanding of the Treaty of Waitangi. Using their findings, the students design an information package (for example, a poster, audio tape or video tape) which will assist people’s understanding of the Treaty.</p> <p>During this activity, there could be assessment of the students’ ability to apply their findings when they make decisions about appropriate items to include in an information package about the Treaty of Waitangi.</p> <p>.....</p> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 16: Integration of Curriculum Requirements: Extract from the Draft of Social Studies in the New Zealand Curriculum (Ministry of Education, 1994, p. 62-63)

This approach was modelled on the pattern adopted by the mathematics, science and English curriculum statements. It reduced cognitive load not only by increasing spatial contiguity of curriculum elements but also by modelling the integration of these elements in a worked example format that resonated with what teachers actually had to do in their classrooms. The approach was also consistent with Hill’s (2001) recommendation that more specific examples should accompany general principles to point direction and to reduce the likelihood of misunderstanding. These examples, however, were removed from the final version of the social studies curriculum because they became the focal point for influential critics (for example, Lockstone, 1996; Education Forum, 1995). The Draft did not help itself by including so many disparate “suggested” examples. There were, for example, 110 suggested contexts at level 5. This gave the appearance of a subject without a coherent content base. As Lockstone (1996) commented:

Difficult already, perceiving social studies as a subject becomes quite impossible when we learn... that none of the topics in this amazing gallimaufry is in fact compulsory... teachers are at liberty to select... their own ideas, or even their own obsessions, anything that can be made to fit within one of the strands. (1996, p. 8)

The sheer weight of examples and their optional nature was also seen as “undervaluing... European inheritance” (Education Forum, 1995, p. 11).

The problem from a design point of view, however, was that the criticism that was attracted to these examples led to *their rejection* rather than *their improvement*. The substance that Openshaw was seeking, and even the balance that the Education Forum argued for, could have been accommodated by changing the nature of the examples rather than replacing them with the “compromise” (Hunter & Keown, 2001) of indicators which, by their general nature, substantially reduced integration. They also caused confusion for teachers who were unsure of whether they replaced, covered or elaborated the achievement objectives: a factor that was compounded by the poor alignment of some indicators to their associated achievement objective (Education Review Office, 2001).

Support materials

It would be unfair to leave the discussion of extraneous cognitive load without making reference to the Handbook written to support the curriculum (Ministry of Education, 1998). Given the decision to replace the examples in the Draft curriculum statement with more general indicators, the Ministry of Education recognised that teachers needed more guidance than the curriculum provided.

The Handbook presents eight worked examples of unit plans: three at the same level as the national identity example discussed in this chapter. The units were based on a template designed to reflect the multiple requirements of the curriculum. This template effectively reduced the spatial discontinuity of the curriculum text by representing the requirements together on one or two pages. Achievement objectives

and specific learning outcomes were presented side-by-side, illustrating their interconnectivity. This interconnectivity was reinforced by explicitly referencing the relevant achievement objective in brackets after each specific learning outcome. For example, the specific learning outcome “explain how the signing of the Treaty of Waitangi is a significant event in the development of New Zealand’s national identity” was referenced to the Level 5 Culture and Heritage achievement objective “ways in which cultural and national identity develop and are maintained”. While this example illustrates how the template assisted in reducing extraneous cognitive load it is by no means certain that the other features of the template, beyond representing disparate dimensions on one or two pages, had the same effect.

The other curriculum requirements are largely included in a check-listed manner. In the Level 5 unit “In Tune”, for example, four perspectives, six aspects of *Essential Learning about New Zealand Society*, and 14 (optional) concepts are listed. While they appear on the same page as the achievement objectives and specific learning outcomes the connections are not made explicit. The risk that this creates is that it models a practice that implies that it is sufficient to acknowledge the inclusion of particular curriculum elements without making it clear how this acknowledgement is carried through in practice and substance. It is significant that one of the early criticisms of implementation was its “superficial” nature and the use of such practices as “tick the box” programming (Samu et al., 1999).

The Consequences of Curriculum Complexity

“Tick the box” programming, or check-listing, is an understandable response to complex, interacting curriculum requirements. Given the mix of requirements represented in Figure 14 (p. 151) it is difficult to know how else teachers can reduce cognitive load and make sense of (and progress with) what they have to do. But there are consequences of this form of sense-making and approach to accountability. One is a lack of true fidelity of implementation. While this might concern those who designed

the curriculum there are more serious and wide-ranging problems that arise from this manner of dealing with complexity. Foremost among these are the problems of superficiality, omission and the emergence of a *de facto* national curriculum.

Superficiality

Superficiality arises when teachers attempt to be faithful to curriculum demands by “covering” the elements they have check-listed in their unit plan. The British philosopher, Alfred North Whitehead (1950), was critical of the deadening effect on student minds of such an approach:

The result of teaching small parts of a large number of subjects is the passive reception of disconnected ideas not illumined with any spark of vitality. (p. 2)

For Whitehead the solution was to cover less and to teach it thoroughly with coverage based on the selection a small number of important ideas “thrown into every combination possible”(p. 3). Thus the goal of education was to develop in students a sense of the power, beauty and structure of ideas. Newmann (1988), expressing similar concerns, argued that “addiction to coverage” limits transfer, reinforces mindlessness and is deceptive because it pretends, in the face of an exponential knowledge explosion, that complete mastery is possible. Others cite research findings from educational psychology to challenge the value of coverage. Dempster (1993), for example, draws on interference theory to argue that new learning is hindered, interfered with, when students are exposed to too much information and when the material that has previously been covered is not well-learned. The consequences of this partial learning are confusion, misconceptions and stereotypical thinking (Gardner, 1991). There is evidence emerging that such difficulties are apparent in New Zealand social studies. The Education Review Office (2001) has drawn the somewhat damning conclusion that: “Students often experience ‘hit and miss’ social studies programmes that can result in shallow learning. It is rare for students to be engaged in a sequence of learning activities that have purpose”(p. 3).

Omission

The counter problem to excessive coverage is the consistent omission of important content. If a curriculum offers as much flexibility as the social studies one does, and if it cloaks this flexibility in a high level of complexity, one legitimate strategy to reduce cognitive load is to omit those areas of learning that are beyond the teacher's expertise. So while the curriculum states that the subject is "based on the systematic study of an integrated body of content drawn from the social sciences and humanities" there is no *demand* that any of these sources of content are accessed. Likewise, *Essential Learning about New Zealand Society* has to be incorporated into programmes each year but there is no requirement, or check, that *any particular* aspect of this learning is covered in any one year, or at that it is covered all. Students can, therefore, be repeatedly exposed to some areas of learning, within their teacher's expertise, while other areas remain completely ignored.

There is evidence historically that this has been a significant problem for New Zealand social studies. A major survey of New Zealand social studies (Department of Education, 1987) revealed significant areas of omission associated with the 1977 curriculum. Of the 606 topics taught by Year 10 social studies teachers only one percent focused on New Zealand in the past. Only 12 percent of Year 10 social studies topics related to areas of the world beyond New Zealand and of those only 1 percent were based on Australia and 3 percent on the whole of North and South America. The most commonly selected overseas setting was the Middle East. Although it was not reported, one suspects that most of this is accounted for by studies of Ancient Egypt.

The omission of New Zealand history evident in these data was supported by research carried out in 15 Wellington schools by a visiting British historian (Low-Beer, 1986). She reported that most New Zealand school students had no experience of studying history and that, as a consequence, they had "neither any coherent view of ... twentieth century national history, nor any practice in using historical evidence"(p. 114). In 14 of the 15 secondary schools that she surveyed teachers expressed the view that students at the end of Year 10 knew no national history and, in the view of one teacher, "it is

best to assume total ignorance of history in all pupils entering Year 11" (p. 114). Low-Beer considered that this situation placed New Zealand at the extreme end of an international spectrum and apportioned responsibility to the nature of social studies in New Zealand schools.

Also on the basis of research in schools Simon (1992) expressed similar but more particular concerns about the state of historical knowledge among New Zealand students. She was critical of the rhetoric of social justice that underpinned the 1977 curriculum when her research revealed that few social studies teachers engage with one of the most significant social justice themes of New Zealand history – the interaction between Maori and pakeha – and when the Year 13 students she assessed, after ten years of social studies teaching, still had "a high degree of ignorance coupled with prejudice" in relation to the Treaty of Waitangi (p. 267). Significantly for the developments that were to follow with the 1997 curriculum, she considered that this situation had been allowed to develop because of the omission of content requirements from the social studies syllabus and the resulting freedom this omission provided for teachers to "bring their own values and prejudices to bear in the selection and development of their programmes" (p. 269). Simon was concerned that, by omission, social studies was supporting the cultivation of "social amnesia"– the forgetting of history and the preservation as a consequence of pakeha dominant class interests" (p. 254).

While there has been research and much comment on the omission of history, the omission of economics is probably even more serious in a curriculum that claims to enable student to participate in society. In the 1997 curriculum economic ideas are largely addressed in a strand entitled "Resources and Economic Activities" but none of the achievement objectives in this strand makes specific reference to such important economic concepts as scarcity, opportunity cost, enterprise, taxation or saving. The indicators and concept lists elsewhere in the curriculum do refer to some of these concepts but given that very few social studies teachers have a background in economics it is likely that most would not see the concepts buried in the achievement

objectives. Overseas research indicates that even if they did, there may be a general reluctance to teach these concepts because economics is regarded as being of little interest to students, because of its association with the “nastiness and competitive attitudes of the business world”, and because of teacher suspicions about indoctrination into capitalism (Hutchings, et al., 2002, p. 8). Nasman and von Gerber (2002) have also reported that teachers, through their lack of economic knowledge and a generally critical view of “consumer culture”, miss the chance to turn children’s daily experiences into opportunities for economic learning (p. 171). It is difficult to understand how social studies can claim to be creating “informed, confident and responsible citizens” when, arguably, one of the most important bases of citizenship - economic understanding – and the least understood by teachers, is referred to so obtusely in the curriculum.

The problem these examples illustrate is that flexibility, combined with complexity and an understandable lack of breadth of teacher knowledge across all the social sciences and humanities, not only undermines the knowledge base of social studies but also leaves important areas of content untaught. It is certainly true that defining “important areas of content” is difficult and contentious but that should not mean that the decisions should be avoided by curriculum designers and left, in Openshaw’s (1996) words, to “overworked and under-resourced teachers” (p. 164). In fact the very resource that would be most likely to help these teachers – well researched, discipline-informed background material for teachers in areas of unfamiliar content – is that least likely to be forthcoming while the plethora of choice remains. Unless the Ministry of Education takes a lead it is simply too risky for publishers to invest resource in what teachers might be choosing to teach²⁴.

²⁴ I am not referring here to the learning activity materials produced for students but to publications similar to the *Making Better Sense of Science* (Ministry of Education) series that, in consultation with academics, developed background notes for teachers on the key areas of content. The difficulties this series faced in terms of representing complex ideas accurately and using language precisely (Peddie, 2000) are not likely to be any less in social studies so the challenge of the task should not be diminished.

De Facto Curriculum

One common means of managing complexity is to access resources - textbooks, resource packs and internet sites - that claim to meet the requirements of the curriculum. These resources provide reassurance for teachers that the background thinking involved in integrating complex curriculum elements has already been done and that by using the resource they will be implementing the curriculum intent. While this use of resources is a common and understandable strategy, it gives rise to three potential difficulties. Firstly, it assumes alignment: in other words, that the resource writers have interpreted the curriculum accurately. Given the alignment problems evident in the curriculum itself this assumption may be flawed. The organisation of social studies texts and on-line resource units around one, rather than multiple, achievement objectives is an example of a significant misinterpretation of curriculum that has been consolidated in schools through the use of published resources²⁵. Secondly, it develops a national curriculum by stealth. Official national curriculum statements are quite properly the object of significant public debate. Resources that interpret this curriculum, however, are not usually subject to the same level of public scrutiny. They nonetheless infiltrate and come to dominate the interpretation of the national curriculum to the extent that, for many teachers, they become the curriculum. This, ironically, leads to the third problem. The justification for curriculum complexity is the flexibility that an open curriculum provides for teachers to respond to student and community needs. The heavy reliance by busy teachers on published resources to help interpret curriculum complexity diminishes, and in some cases completely eliminates, this espoused flexibility. The content might just as well have been defined more closely in the curriculum and at least then it would have been subject to more public scrutiny²⁶.

²⁵ See full discussion of this issue in Chapter 4, p.109.

²⁶ I am not blind to the political reasons why this did not happen in the case of the 1997 curriculum. Such was the criticism surrounding the draft and revised draft that the final design was a compromise that transferred many of the critical, and contentious, decisions about content to teachers (Openshaw, 1996/97).

Empirical Findings on Teacher Understanding of Curriculum Requirements

This chapter has argued that design complexities, especially surrounding the 1997 curriculum, have created a cognitive load that compromises implementation as intended. It is pertinent to ask, therefore, whether teachers perceive this load to be as great as that claimed here. There have been two surveys of teacher opinion that relate to this question.

An early pilot survey (27 respondents) of teacher readiness for curriculum implementation reported that “many schools felt confident about their programmes, had done some good work on the ... strands, and felt that they were making progress resourcing the (curriculum)” (Samu et al., 1999, p. 5). This relatively high level of teacher satisfaction with the initial process of implementation was tempered by teacher comment that they were concerned about assessment, monitoring and reporting, and about incorporating two sections of the curriculum into their planning - *Essential Learning about New Zealand Society* and the Processes. These latter two concerns lend support to the argument advanced in this chapter that the myriad of requirements complicates sense-making: an argument given even further weight by a response reported in this pilot survey from a social studies teacher educator that “some schools think they are doing a lot – but it’s very superficial” and another who claimed that implementation was “very itchy-bitsy”(p. 13).

A follow-up survey with a much larger sample (853 teachers) was completed in 2002 (McGee et al., 2003). The data in this report reinforced the impression established in the earlier pilot survey that teachers were, in general²⁷, very satisfied with the new curriculum. Only 3.8 percent of respondents found the curriculum “not user-friendly” with 65.1 percent finding it either “user-friendly” or “very user-friendly”. A significant proportion of teachers reported that the curriculum “always” assisted their planning at school or department level (56.3 percent) and at the level of classroom programmes (48.8 percent). These data, especially given the absolute nature of the “always”

²⁷ For the most part the responses of primary teachers were slightly more positive than secondary teachers.

response from around half of the respondents, appear to represent a very high level of endorsement for the curriculum document as accessible and as an aid to planning. All, however, may not be as it seems.

Firstly, teachers reported some reservations. Although a relatively high proportion (54.3%) said they would make no changes to the structure and organization of the document, when the survey probed deeper some concerns were evident. In response to the question about implementation challenges, some teachers commented on the difficulty of incorporating the multiple curriculum requirements and on the difficulty of some of the concepts for students. The strand achievement objectives, the core of the outcomes-based curriculum, were also regarded, at least sometimes, as too broad by 44.9 percent of those surveyed.

Second, and perhaps more significantly, the data categories used in this report mask considerable potential variations to the extent that it is difficult to be certain about the strength of its generally positive conclusions. For example, although 56.3 percent claimed that the curriculum “always” assisted with their planning there is no indication of what “assists” actually means. The positive interpretation is that it refers to an active process where the curriculum makes planning better. It could, however, also be taken to mean that the curriculum is simply a source that is “always referred to”. This interpretation relegates “assists” to a much more passive role. Similarly the use of the “sometimes” classification within the report makes interpretation difficult. For example, 36.2 percent indicated that the strand achievement objectives were “sometimes” too broad. Given that there are 10 objectives at each level, and given that there is no other intermediate classification between “about right” and “too broad”, it is difficult to know whether “sometimes” means that 2 or 3 of the 10 are too broad – a lesser problem – or 6 or 7 – a more major problem.

The empirical data, therefore, are not yet robust enough to enable us to draw any firm conclusions about teacher perceptions of complexity. The generally positive tenor of the overall responses is tempered by comments and data that indicate that the details

of the curriculum may be causing some difficulties. Furthermore, these data, based as they are on teacher perception, may be masking misunderstandings of which teachers themselves are unaware. Levels of satisfaction with the curriculum may well be inflated by the flexibility built into the curriculum. If teachers fail to identify the accountabilities alongside this flexibility, or if, as emerging practice suggests, they simply checklist such accountabilities, or if they are unaware of the content knowledge they lack, their sense-making in relation to the curriculum is largely unconstrained. In such circumstances they are unlikely to perceive complexities within the curriculum and, consequently, few barriers to implementation. The more critical comments from the teacher educators in the pilot study, combined with the very critical Education Review Office (2001) view of implementation, lend support to the view that implementation is more problematic than teachers perceive and to the argument developed in this chapter that, whether teachers recognise it or not, complexity of design is a significant factor inhibiting successful implementation.

Conclusions

Social studies has a long history of curriculum design that supports teacher choice about content and context. This tradition is based on the desire to develop a curriculum that is relevant to, and inclusive of, students and their communities and that respects the “discretionary space” (Hlebowitsh, 2005) that allows for the exercise of teacher professional judgment. This flexibility has been characterised by two different curriculum design patterns. The first, evident in the 1942, 1961 and 1977 curriculum statements, was to espouse teacher choice in the general guidelines and to support this with suggested or recommended studies that were described at varying levels of detail. The problem this created, however, from a design point of view was that, because these examples were closer to teacher practice than any other element of the curriculum, and because they answered the important “what do we have to do?” question, the *suggested studies* became the *actual studies*. This compromised the very choice that the curriculum espoused to provide. Furthermore, as reported in previous chapters, the lack of explicit alignment between these studies and general curriculum

principles meant that what was being implemented was, at best, only partially reflective of curriculum intentions.

The developers of the 1997 curriculum, aware of these difficulties, adopted a different approach to flexibility. They surrounded non-context bound achievement objectives with an elaborate set of general requirements that had to be satisfied over specified time periods in the interests of providing students with a “balanced programme”. The combination, however, of flexibility and accountability that characterised this curriculum imposed a significant cognitive load on implementing agents. Teachers were required to consider, and demonstrate that they had addressed, multiple and interacting curriculum elements. Because these elements were themselves mostly defined in an open way, teachers needed to make sense not only of the achievement objective they were targeting but also of the related elements and the interactions within these elements, and with other elements. This complexity was not supported by clear and unambiguous graphics that assisted teachers to make connections and nor was it supported by the spatial contiguity of related elements. The multiple elements were spread across many pages of the curriculum increasing the pressure on representational holding as teachers were required to search the curriculum text to establish relevant requirements and connections. For largely political reasons the integration of elements that had been achieved through the use of worked examples in the Draft of the 1997 curriculum was eliminated from the final curriculum. In so doing a significant sense-making strategy was lost.

The complexities associated with the 1997 curriculum are consistent with Hill’s (2001) observation that curriculum designers and teacher implementers often have such different schema for the subject, based on different experiences and learning opportunities, that the well-intentioned desire of designers to respect teacher professionalism by providing choice is not always met with a level of expertise and commitment commensurate with their own. As Truss (2005) has somewhat whimsically observed flexibility is a double edged sword:

Choice ... is a burden dressed up as a privilege. It is bondage with bells on. And, of course it still makes us do all the work. But it is also beguilingly self-aggrandizing, which is why we won't call a halt (p. 84).

For many primary and secondary school teachers social studies is accorded a lower priority than other curriculum areas and their interest and background knowledge in the subject is often low or skewed towards one of the related academic disciplines. While choice might be valued from the perspective of treating teachers as professionals in effect it adds to the workload of those whose priorities are elsewhere. In order to make sense of a complex curriculum and to reduce the cognitive load associated with flexible design these teachers either fall back on published resources which become, in effect an *ad hoc* curriculum but lacking the formal scrutiny to which national curriculum is subjected, or they acknowledge requirements by check-listing them but do not necessarily carry this acknowledgement through into the detail of planning and implementation. The consequence is either superficial coverage or the consistent omission of significant but poorly understood requirements. If these problems are to be avoided in the future, cognitive load theory suggests that curriculum design needs to express the integration of elements in a much less complex manner than that modelled in the 1997 curriculum.

Design Propositions

Part Two of the thesis has sought to appraise the history of New Zealand social studies curriculum design with reference to the design criteria developed from the sense-making analysis in Part One (p. 62). This historical analysis has revealed significant sense-making challenges related to the manner in which shifts in meaning have been communicated, the extent of internal coherence around an agreed purpose, and the complexities associated with retaining teacher flexibility. These challenges reinforce the tenor of the design criteria developed at the end of Part One. They are elaborated below as a set of design propositions particularised to social studies design experience.

These propositions will be used to guide the recommendations for future design developed in Part Three.

Design Proposition One: The design needs to clearly explain the rationale behind any changes in content and purpose.

Design Proposition Two: The design needs to acknowledge existing schema for the subject by integrating where possible any changes in emphasis within structures and approaches that are familiar. This proposition overlaps with the previous but whereas the first proposition relates specifically to the *rationale for change* this relates to the *nature of change*. The emphasis is on minimising unnecessary change by showing how the new ideas connect to current ideas.

Design Proposition Three: In explaining the rationale for change, and in connecting to current schema, the design also needs to consider any misconceptions that implementing agents might hold in relation to the reform ideas and address these by way of “misconception alerts” that explain not only what the reform is but *what it is not*. This third proposition is a critical counter to the risks associated with the second because connecting to the familiar risks lack of recognition by implementing agents that the reform is advocating something new.

Design Proposition Four: The design needs to be developed, and transparently structured in its organisation and expression, around a clear and unambiguous purpose. While this is likely to increase the tension and controversy surrounding development, from a cognitive perspective it enhances schema acquisition by reducing the pressure on working memory to make connections between disparate elements and it also minimises the potential for internal contradiction that arises from attempting to combine different approaches to expressing multiple curriculum purposes.

Design Proposition Five: The design needs to support understanding of curriculum structures with charts and diagrams that are aligned with and make explicit the connections to the text.

Design Proposition Six: The design needs to recognise that social studies teachers generally accord the subject lower priority than other areas of the curriculum and, therefore, that complexity needs to be reduced. This involves simplifying requirements and integrating curriculum elements at the level of detail most likely to be attended to by teachers. This spares teachers the cognitive complexity of integrating multiple and diverse elements and enhances the likelihood of alignment between curriculum principles and curriculum specifics. There is an inevitable trade off, as there always is in curriculum, because such integration also reduces flexibility and, if too specific may also court public controversy and teacher backlash.

Design Proposition Seven: The design needs to acknowledge that compulsion and flexibility are not mutually exclusive and that both are required in a national curriculum statement to reflect entitlement (as perceived by the State) and professional autonomy and relevance (as perceived by teachers and students).

It might be claimed that these propositions undermine teacher professionalism by reducing teacher “discretionary space” (Hlebowitsh, 2005) and that such propositions relegate curriculum design to a technical exercise with the sole evaluative reference point being teacher compliance. The defence against such claims is two-fold.

First, as argued elsewhere in this thesis, there is an essential normative element to national curriculum policy. It is written to communicate the State’s intentions for learners. What the criteria above aim to do is to make intention clear rather than hiding it, as in the past, under a plethora of conflicting ideas and complexities. Such an approach might shield the designers from criticism and to be fair, given the highly

politicised experience of social studies curriculum development in the 1990s, it might have also enabled the 1997 curriculum to actually be published. But it does nothing for the status of social studies as a worthwhile contributor to the compulsory education of young people in New Zealand to perpetuate in design the confusions, contradictions and uncertainties that have plagued social studies for more than sixty years. Better the debate in the open than either not at all or by subterfuge through an excessively permissive curriculum.

Secondly, while the design criteria are technical in the sense that they recommend specific actions this does not imply that the *outcome* is necessarily technical. In fact, if flexibility continues to be sought by teachers, and there is every reason to believe it will, then powerful technical design should make this more, rather than less possible, because it will make the nature and extent of flexibility more explicit and understandable. It might also reduce the pressure for, and cost of, the professional development that is increasingly demanded to support any change in curriculum and teaching. This is especially the case if curriculum support materials are themselves designed consistent with the cognitive principles advanced here and within the heuristics proposed by Davis & Krajcik (2005). Effective design should provide greater freedom for teachers to use their professional judgment and make their own decisions, consistent with the normative agenda of the curriculum, without necessarily requiring an intervening round of clarification via formal national professional development.

**PART THREE: A WAY FORWARD FOR NEW ZEALAND SOCIAL
STUDIES DESIGN**

CHAPTER 7

Citizenship Education and the “Essence” of Social Studies

The analysis in the previous sections of this thesis indicates that social studies has many issues to resolve if it is to continue to justify its position as part of the core curriculum of New Zealand schools. Foremost among these is a clear expression of purpose that establishes the subject’s unique niche in New Zealand education. The other design issues evident in New Zealand social studies flow from this expression of purpose, namely: acknowledgement of the relationship of this purpose to existing teacher schema about social studies; consistent and transparent alignment between the expressed purpose and the conceptual organisers of the curriculum; the role of the social science disciplines, especially history and geography, in informing the curriculum content; the provision of teacher flexibility within a clear and coherent structure; and the development of implementation examples that integrate, and are aligned to, the intent of the curriculum.

One of the difficulties surrounding the development of the 1997 curriculum was that a clear purpose for the subject area was never established from the outset which led to its construction around an essentially pragmatic and atheoretical framework. Although the language of organising strands – social organisation; culture and heritage; place and environment; time, continuity and change; and resources and economic activities – reflected the language of structures that were in place at the time in Australia and the United States it is difficult to avoid the impression that their selection owed more to the appeasement of the contributing disciplines than it did to the desire to reflect a theoretical coherence in the service of a clear overriding aim.

Ironically, the structure has never sat comfortably with the very disciplines it was designed to reflect. Economics teachers in particular have been highly critical of the “resources” focus in the strand that ostensibly reflected their discipline. Marsh (2004)

reports that in Australia there has been similar disquiet over organising frameworks and that in many states new structures have begun to emerge. He continues to advocate for “debate about the conceptual structure” (p. 1) as a test of the subject’s integrity.

This chapter aims to contribute to the search for greater theoretical coherence within the learning area so that a more robust and defensible framework guides the development of the subject. To achieve this, the chapter develops the argument for affirming citizenship education as the central and unique purpose of social studies. It is acknowledged that such a purpose is but one of many and that a compelling case could have been made for aligning the subject more transparently to the contributing disciplines, or to the hitherto largely ignored theoretical framework proposed by the Education Forum (1995). This chapter settles, however, on a citizenship education aim primarily on the basis of its historical connections to social studies in New Zealand and internationally. It begins by identifying the central concepts and processes of citizenship education with reference to theoretical commentaries and to citizenship education curricula in three western democracies. A definition of “social studies” is proposed on the basis of this analysis. The chapter expands the case for directing social studies through a citizenship education purpose and explains the educational challenges associated with such a purpose along with the challenges it is likely to pose for existing schema about social studies and about citizenship education.

The Nature of Citizenship Education

The characteristics of citizenship education are not easily defined or universally agreed. If the characteristics are to have validity as curriculum organisers then they need to be both theoretically informed and capable of practical implementation. This section draws on both theoretical and practical sources to arrive at a definition of, and a model for, citizenship education. It also draws on these sources to establish conceptual organisers for social studies derived from a citizenship education base.

The focus on concepts is deliberate. First, it is consistent with the national requirement that all curricula must be organised by strands that represent the main dimensions of the subject. Secondly, by using concepts derived from a common source to define these main dimensions it establishes the curriculum on a theoretical base that is currently missing. It also emphasises the connectedness of the strands and the importance of focusing learning on important ideas. There is a long tradition in social studies education, originating in the work of Bruner (1960) and Taba (1962), of sourcing student understanding in important ideas. Unlike the recently promoted factually-based Core Knowledge curriculum model developed by Hirsch (Core Knowledge Foundation, 1999), it was Taba's view that specific facts could only be determined once the basic organising ideas had been decided. A leading New Zealand researcher made much the same point in a radio interview last year when, reflecting on many years of detailed observation in classrooms, he commented that if teachers want to understand better what students are learning they need to select what is very important in a domain and to spend more time teaching it and asking students what they have got out of it (Nuthall, 2004a). Whitehead's plea for education to focus on a small number of important ideas 'thrown into every combination possible' (Whitehead, 1950, p. 3) expresses the same sentiment from a philosophical rather than empirical standpoint. Erickson (2002), working specifically in the curriculum field, claims that curriculum with a strong conceptual focus, through its alignment with the organisation of schema in the brain, facilitates depth of understanding and the transfer of knowledge.

Heater's Model of Citizenship Education

One of the most comprehensive theoretical models of citizenship education is that advanced by Heater (1999, 2004). He proposes a "cube of citizenship" (Figure 17) in which education intersects with five citizenship elements across four geographical levels.

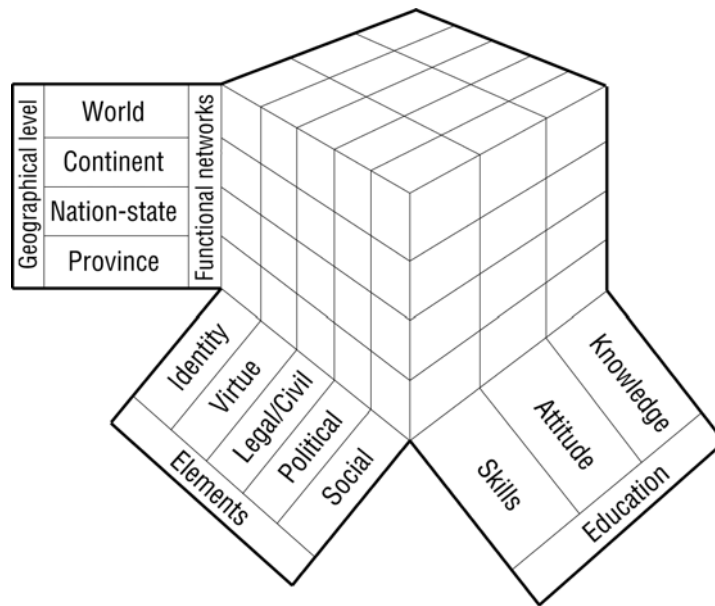


Figure 17: Heater's Cube of Citizenship (Heater, 2004, p.326)

The specification of geographical levels represents Heater's contention that the five elements of citizenship no longer apply to a single relationship between the individual and the State but rather that the relationship is "layered" and operates simultaneously at local, nation-state, regional and global levels (Heater, 1999). Heater argues that education has a responsibility to develop knowledge, attitudes and skills across these four geographical levels in relation to each of five elements of citizenship – identity, virtue, civil and legal rights, social citizenship, and political citizenship.

Identity

Identity refers to a sense of togetherness based on shared interests, traditions and territory and is represented by belief systems, symbols and ceremonies. It is a force that binds a group together over time and cannot, therefore, be fully understood without requiring students to engage with the "collective memory" of history. It also has a strong affective dimension because it deals with personal feelings and choices (Osler and Starkey, 1999). Heater (2004) acknowledges the skill required in helping students understand competing identities, their own included, and from this understanding to develop "acceptance across cultural divides of common citizenship [so] crucial for civic harmony and equality" (p. 344).

Virtue

By “virtue” Heater means: loyalty – the emotional attachment to an institution, place or group; responsibility – the recognition of legal duties and of moral obligations towards others and towards the environment; and respect for political and social procedural values such as freedom, toleration, fairness, respect for truth and respect for reasoning.²⁸ Citizenship education, therefore, has a potentially contentious moral and values component as well as a participatory component. Citing the United World Colleges requirement for all students to join a programme of community service, Heater (2004) comments:

If social studies lessons do not stimulate a desire for community service, they have failed in their good citizenship objective; if they do stimulate a demand for practical opportunities and do not provide them, then the school has similarly failed in that objective. (p. 212)

Civil and legal rights

Within this element Heater distinguishes two groups of rights – the right to be free from interference or oppression by the State (for example, the right of assembly, freedom of speech) and the right to self-improvement (for example, the right of association and to own property). Repeating his concern that citizenship education should encourage participation, Heater argues that education in civil and legal rights must go beyond the mere identification of these rights and their attendant responsibilities. While acknowledging that knowledge is a necessary pre-condition of skill Heater contends that students must also be “taught how to use channels of communication, both to secure rights and to seek redress in case of their violation.” (p. 270).

Social citizenship

This element derives from the assumption of fundamental equality of status and dignity between citizens - hence the obligation upon the State to guarantee all citizens a basic standard of living and to flatten out major disparities. Thus citizenship education

²⁸ Heater sources this list of procedural values to Crick & Porter (1978), p. 66.

must develop economic awareness, in particular of decision-making forces and consequences as they relate to the allocation of scarce resources.

Political citizenship

Heater acknowledges that this element is the most controversial because it goes to the heart of the debate about whether political awareness is appropriately taught to young people. He describes a conservative or “elitist” position which claims that political awareness is too complex and technical to be taught to those with limited electoral experience; that poorly understood awareness may raise unrealistic expectations of political influence which if ultimately frustrated provoke anger; and that it is difficult for teachers with opinions of their own to avoid indoctrination. According to this view knowledge of the machinery of government is sufficient political education (Heater, 2004, p. 225). The counter “participative” view described by Heater claims that conservative political education defends the status quo and, therefore, deprives those who would benefit most from changes in society of opportunities to understand the processes of appropriately challenging this status quo. Accordingly this counter view argues that political citizenship should develop the skills of debate and negotiation and apply these in contexts – work and community – that have more meaning for young people than participation in formal national politics.

The Educational Task

Taken together these five elements across four geographical levels establish the scope of citizenship education. The main citizenship education concepts that emerge are those of identity, loyalty, freedom, rights, duties, justice, social justice and representation (Heater, 2004, p. 344). For Heater, a citizenship education curriculum should provide opportunities for students to develop and understand these concepts from an historical perspective, and to “absorb some basic facts” (2004, p. 344) about the evolution of the status and role of citizens and the ways in which citizenship has been, and is, expressed through institutions and laws. In rejecting an “analytical and theoretical approach” (2004, p. 344) to this content he advocates the development of “the skills to act” (1999, p. 180), sourced in practical and personal issues of citizenship,

including personal feelings and choices, that are often associated with problems and controversies at local, national, regional or global level. The role of the teacher in this curriculum is to stimulate interest; to help students clarify their own values in relation to issues; to develop a “sensitive critical faculty for the detection of bias and special pleading”(2004, p.345); to assist students to understand possibly competing identities; to encourage empathy; and to clarify the reciprocal nature of rights and responsibilities.

The Educational Challenges

While it is tempting to view citizenship as a unifying concept for education, Heater warns of four polarising trends that pose significant educational, and societal, challenges. Foremost among these is the tension that exists between republican and liberal views of the citizenship. The republican view places responsibilities ahead of rights. Thus citizenship involves the elevation of civic duty over individual interests, active participation in the community and contribution to the “common good”. The contrary liberal view places an emphasis on the individual, and on the protection of their rights and freedoms from the arbitrary use of power. As Davies (2003) explains:

the central idea is that all individuals are equal, are independent of any duty or circumstance, and are depositories of inalienable rights that cannot be revoked by any social institution, and in particular by the State (p. 5).

The competition between individualism and communitarianism poses challenges for educators because of the contradictions that can attend to the simultaneous consideration of such ideas. Heater (2004), for example, identifies the contradictory imperatives advanced by many on the political right to “rediscover the civic virtues of community obligations and cohesion” while at the same time arguing “fervently the case for economic freedom” (p. 289).

A second, and closely related, tension within citizenship education is the clash between the desire of individuals to be free “from civic concerns in order to pursue a private family life” and the requirement “to participate democratically in order to preserve

political freedom” (p. 289). The assumption, therefore, that providing opportunities for students to participate in their community will encourage them to do so has to be tempered by understanding the right that students have to preserve their freedom *from* participation.

A third tension is the difficulty, and desirability, of attempting to apply a unitary concept in an increasingly diverse society. Heater (2004) describes this as the contrast between the assimilationist and integrationist views of citizenship. The assimilation view trades loss of separate identity for “equalisation” – i.e. equality before the law, equality of political opportunity, and the guarantee of a minimum standard of living. By contrast the integrationist view rejects a “universally applicable citizenship blueprint” with the needs of each group in society needing to be “treated separately and on their own merits” (p. 290). As Isin and Wood (1999) explain in this regard, the notion of common good risks obscuring the legitimate rights of oppressed groups in a society. The citizenship, and the educational, challenge, therefore, is to understand the extent to which it is possible to “make our belonging to different communities of values, language, culture and others compatible with our common belonging to a political community whose rules we have to accept” (Mouffe, 1995, p. 34, cited in Isin and Wood, p. 10).

The final polarising trend is the competition for loyalty and identity between “world” and “nation-state” citizenship. This is exemplified by the contrast between the growing number of sovereign states asserting their autonomy and nationalism and the increasing articulation of the growing dangers of nationalism, and the contradiction inherent in the encouragement for students to understand the interconnectedness of their world in order to “preserve an endangered planet” at the same time as fostering a sense of loyalty that “bolsters and conserves the established nation-state” (p. 297).

Heater’s analysis provides a strong philosophical and theoretical argument for citizenship education and he sketches the essential components of such a curriculum

and the challenges inherent in it. He stops short, however, of developing this curriculum to a level that could be directly utilised by teachers. In order, therefore, to clarify the nature of the educational task the discussion turns to an analysis of curriculum documents that have been written and implemented in three Western democracies, the United States, England and Australia.

Three National Citizenship Education Curricula

In the United States, the Congress-funded Goals 2000 strategy led to the development of voluntary national standards in civics and government. These standards were developed by the Centre for Civic Education with over 3000 individuals and organisations contributing to the identification of what students should know and be able to do in the fields of civics and government (Centre for Civic Education, 1991). Subsequently they have formed the basis of state curricular frameworks throughout the United States.

In England, after initially being identified as a cross-curricular theme, citizenship education was mandated from September 2002 as a statutory requirement for secondary schools (Qualifications and Curriculum Authority, 1999). Knowledge, skills and understandings at each of Key Stages 3 and 4 were prescribed on the basis of recommendations made by an advisory group convened to develop a statement of aims and purposes for citizenship education and to develop a framework for content and delivery (Crick, 1998).

In Australia, a Civic Experts Group was formed in 1994. This group consulted widely and received 180 written submissions. They recommended the provision of a sequential programme of civic education across the years of compulsory schooling (Civics Expert Group, 1994). This report was superseded in 1996 by the new Labour government's Discovering Democracy initiative that resulted in the injection of \$17.4 million dollars into citizenship education developments. As a consequence, Australia has produced packages of curriculum materials for primary and secondary schools and

supported the professional development of teachers in the use of these materials (Print & Gray, 2001).

The citizenship education curriculum specifications arising from these initiatives are outlined in Appendix C (p. 270). In order to determine the common themes within these documents two processes were followed. First, the three national citizenship education curriculum texts were read with a view to revealing possible underlying concepts or themes. An initial listing of concepts was determined on this basis. These concepts were then re-tested against the separate elements of each curriculum document for comprehensiveness of coverage. Seven organising concepts were revealed – government (GOVT), law (LAW), identity (IDEN), human rights(HR), international relations (INT), civic participation delayed (dPART) and civic participation immediate (iPART). Within each of these organising concepts a further process of sub-categorisation was also carried out because it was evident that while the concepts were common, each curriculum treated them in different ways and with different emphasis. The resultant conceptual framework and the relative emphasis on each component within the three national curricula are outlined in Table 5.

Table 5: Frequency of Reference to Concepts Central to Three Citizenship Education Curricula

| Concept | Sub-classification | Eng | USA | Aust | Total |
|-----------------------------------------|--------------------------------------|-----|-----|------|-------|
| Government (GOVT) | origins | | 1 | 3 | 28 |
| | purposes | | 2 | | |
| | systems and processes | 1 | 5 | 9 | |
| | democracy | | 2 | 5 | |
| Law (LAW) | origins | | | 1 | 9 |
| | processes | 2 | 3 | 3 | |
| Identity (IDEN) | national | 1 | 2 | 1 | 7 |
| | sub-national | 1 | | 1 | |
| | civic values | | 1 | | |
| Human Rights (HR) | historical development | | | 1 | 7 |
| | nature | 1 | 1 | 1 | |
| | social and economic | 1 | | 1 | |
| | protection | | | 1 | |
| International Relations (INT) | interactions with other nations | 1 | 2 | | 5 |
| | global interdependence | 1 | 1 | | |
| Civic Participation – delayed (dPART) | political | 1 | 1 | 5 | 17 |
| | opportunities to influence decisions | 1 | 3 | 2 | |
| | being informed | | 1 | | |
| | role of media | 1 | 1 | 1 | |
| Civic Participation – immediate (iPART) | research skills | 1 | | | 7 |
| | understanding others | 2 | | | |
| | discussion, negotiation, debating | 4 | | | |

Citizenship education concepts

The predominant emphasis of the documents is on the need for students to understand the systems and processes of government within each nation and the ways in which these exemplify democracy. The U.S. and Australian documents have a more overtly formal political emphasis than the curriculum for England (NCE). For example, seven of the 20 U.S standards make specific reference to the constitution or to constitutional government and 13 of the 32 Australian curriculum requirements make reference to

national or federal political systems or processes. These two documents also have strong historical and comparative specifications. Both seek to use selective historical comparisons (for example, Magna Carta, Ancient Greece, the Declaration of Independence) to understand the origins of current political systems. Such specific comparisons, while implied, are left unstated in the NCE. The relationship between government and lawmaking, the concept and expression of national identity, the nature of human rights and an understanding of the role of the media in opinion formation are consistent themes of all three curricula.

The concept of civic participation is developed in each document but with different emphases. Each of the documents requires students to understand how to participate in government, legal and electoral processes. Participation, however, is largely expressed as a delayed activity. Students are required to know about such potential participatory activities as voting, joining groups to influence opinion and protecting consumer rights but because of the adult and future orientation of many of these activities they do not require active and immediate participation.²⁹ It is only the NCE that is explicitly directed towards the notion of direct and immediate participation by requiring research of a topical issue or event, participation in groups and in school and community-based activities, negotiation and debate. This distinction is an important one because direct and immediate participation encourages a more experiential and affective dimension within citizenship education whereby the “affective provides a catalyst for action ... [and]... the cognitive informs the action and gives it coherence” (Osler and Starkey, 1999, 204)

Citizenship education skills

The type of direct participation favoured by the NCE introduces a broad range of skills into the citizenship education curriculum. In order to engage with everyday civic realities (Kennedy, 2005) students need to be able to source and critically assess relevant information, to work co-operatively with others, to discuss, negotiate and

²⁹ Although it is accepted that creative teachers will use such approaches as games and simulations to replicate future active participation.

debate in ways that respect difference; to resolve disagreement peacefully. They need to recognise the importance of beliefs in determining action (Cogan & Derricott, 2000) and to develop the confidence to communicate their views to others and to listen to and consider contrary views. The aim, in Hill's (1994) words, is to develop skills and knowledge that facilitate "critical affiliation" (p. 105). By this he means "neither uncritical loyalty nor aloof detachment but involvement coupled with constructive criticism" (p. 105).

Towards a Definition of Social Studies based on a Citizenship Education

Purpose

While it is difficult to generalise across all of the evidence presented above in any complete way it is clear from this analysis that citizenship education has two dimensions – a knowledge dimension (civic literacy) and a participant dimension (civic participation). The definition of social studies proposed in Table 6 is arrived at by combining these two dimensions.

Table 6: A Definition of Social Studies as Citizenship Education

The aim of social studies education is to build the capacity for students to participate in society and to contribute to the common good through:

- developing understanding of the nature, development and functioning of human communities at local, regional, national and global levels, and through
 - active participation in meaningful decision-making experiences, related to significant societal issues, that develop the skills of analysis, dialogue and self-reflection.
-

This definition is elaborated diagrammatically in Figure 18 in the form of a citizenship education model within the context of a western democracy.

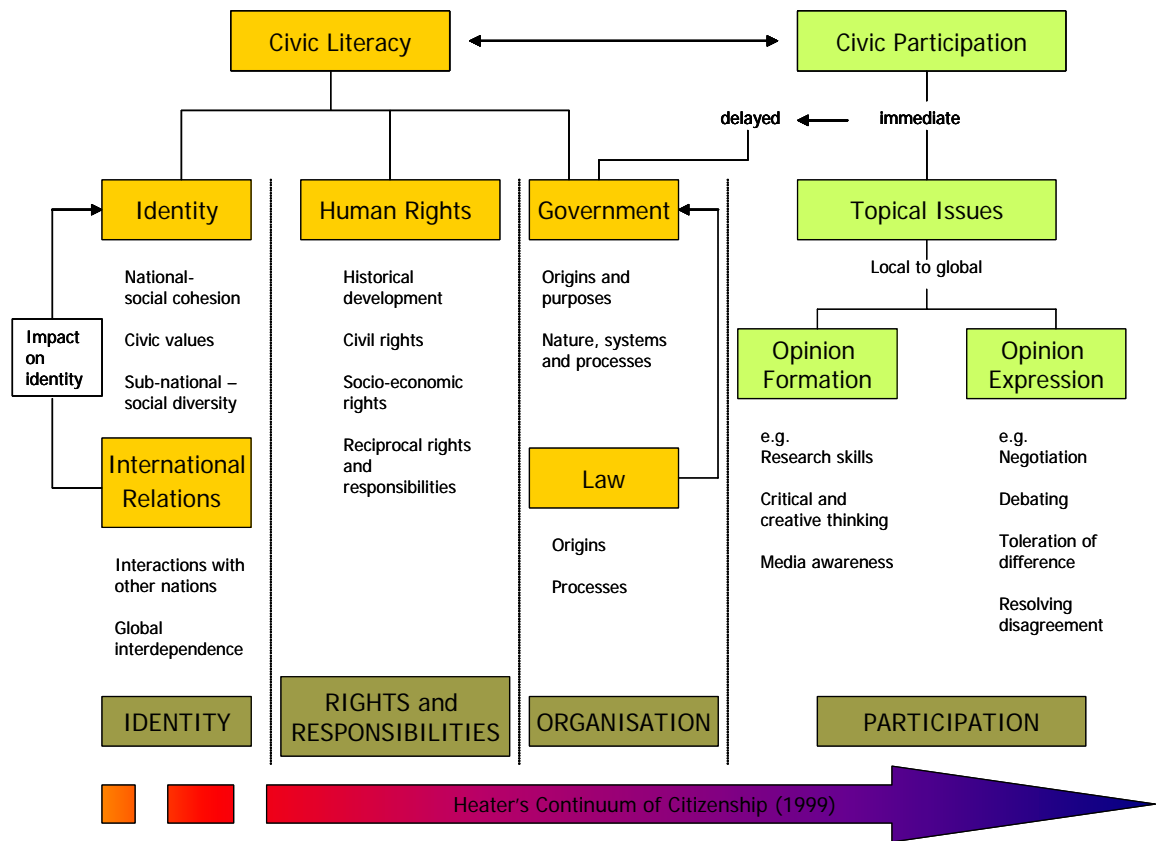


Figure 18: A Model of Social Studies as Citizenship Education in a Western Democracy

The definition begins by addressing the tension that Heater identifies between the liberal and republican views of citizenship. Because these positions differ in emphasis rather than existing as complete contradictions, the definition incorporates both by identifying the aim of “building the capacity to participate in society” (the liberal view, with “participate” referring to the pursuit of individual interests and aspirations, and the aspirations of particular groups in society) and the aim of “contributing to the common good” (the “unifying” republican view).

The definition and the model acknowledge the significance of student understanding of formal national political process revealed by the analysis of the three curricula. They also acknowledge that identity in a citizenship sense exists within and beyond national boundaries, and that citizenship education needs, therefore, to consider both

global and sub-national issues. The civic participation dimension distinguishes between participation as immediate (personal actions that students can take to have immediate influence), and participation that is delayed. Immediate participation acknowledges the arguments of Heater that citizenship education not only teaches skills that can be subsequently transferred to future situations but allows these skills to be practised in situations that have relevance and meaning to students. It is likely, in fact, that this is the only way in which they will be transferable. If students do not practise these skills in situations that have meaning to them, then they will remain formal, academic and adult. Kennedy (2005) has suggested that relevant and meaningful contexts – “things that matter to young people” (p. 304) - will be found in the examination of new geopolitical contexts (for example, the SARS pandemic, immigration policies), civic megatrends (for example, the recognition of diversity, the status of indigenous people, the changing status of women in society), and civic realities (for example, homelessness, the increasing violence of urban life). At the global scale, Cogan and Derricott (2000), on the basis of an extensive cross-national Delphi study, identified themes such as peace and security, equity and fairness, environmental conservation, citizen disempowerment and increasing disparities as having major significance for the education of young people in the next twenty-five years.

Delayed participation is founded upon civic literacy. The model reflects the view that immediate practice alone is insufficient for future participation in the more formal structures of democracy without an understanding of those structures - hence the emphasis on developing student understanding of government, law, human rights and identity.

Across the base of the model a developmental continuum of citizenship education understanding is proposed. This continuum, which summarises the basic structure of the diagram, is adapted from Heater’s (1999) “spectrum of cosmopolitan citizenship” (p. 136). Because it is essentially social in nature citizenship understanding begins by

recognising a feeling of identity or community with others. From this position develops the acceptance that the individual has responsibilities towards others and towards the environment. Beyond this develops the recognition that an individual is bound by systems of organisation - codes of formal and informal law that reflect both rights and responsibilities and that are upheld by institutions and authority structures. Finally the development of these systems is advanced or challenged by those who are committed to participation and involvement.

Justifying the Organisation of Social Studies through a Citizenship Education Purpose

Any justification for directing social studies through a citizenship education purpose needs to consider the role that citizenship education has traditionally played within social studies, along with the demonstrable need for a citizenship education purpose to assume primacy within the subject.

The History of Citizenship Education in Social Studies

The use of citizenship education as an organising concept for social studies is not new. Almost 30 years ago an early classification of the nature of social studies identified “citizenship transmission” as one of the three traditions of the subject (Barr et al., 1977). Barr and his colleagues described this tradition as the inculcation of “norms, beliefs and values” consistent with teacher views of the “ideal society and of ideal citizenship” (p. 61). Subsequent classifications, while using different labels – “social studies as knowledge of the past and as a guide to good citizenship” (Brubaker et al., 1977) and “social studies as cultural transmission” (Janzen, 1995) - have reaffirmed the status of citizenship as one of the central tenets of social studies. The largest social studies association in the world, the National Council for the Social Studies (NCSS) in the United States, continues to orient social studies towards a citizenship education purpose. They define social studies as “the integrated study of the social sciences and humanities to promote civic competence” and claim that the subject’s prime purpose is

to “teach students the content knowledge, intellectual skills, and civic values necessary for fulfilling the duties of citizenship in a participatory democracy” (NCSS, 2005).

Social studies curriculum historians (for example, Archer and Openshaw, 1992; Barr, 1994, 1996; McGee, 1998; Openshaw, 1996) have also established that citizenship education has been a central theme of New Zealand social studies.

In spite of this centrality of purpose, however, there has been significant criticism in New Zealand of the way in which citizenship has been represented and enacted. It has been argued that New Zealand social studies, in spite of the veneer of social science and inquiry introduced in 1977 and reaffirmed in 1997, has essentially pursued a citizenship transmission approach that has encouraged the largely uncritical inculcation of values deemed by teachers and curriculum writers to be essential (Archer and Openshaw, 1992; Openshaw, 1996). While the particular values have changed over time from “conservative” (e.g. obedience, loyalty and duty) to “liberal-progressive” (respect for human dignity, respect for the idea of difference and commitment to social justice) Archer and Openshaw argue that liberal-progressives retain the same basic “allegiance to social responsibility, social competences and consensus values” (1992, p. 25) as the conservatives of whom they have been so critical and wary. This argument has received empirical support from a small-scale survey of teachers in four primary schools (Barr, 1996). Forty-five percent of these teachers “had no idea that citizenship was a goal of social studies” (p. 26) but in response to a subsequent question about what citizenship meant to them the majority of responses fell into two categories: “relating to others as a member of a community” and “learning responsibility and acceptable attitudes and values” (p. 27). It is difficult not to draw the conclusion that these teachers were giving prominence to the inculcation of values but not recognizing this process in their own practice and certainly not naming it as citizenship.

McGee (1998), while agreeing that social studies had essentially adopted an uncritical and socializing approach to citizenship, added another concern. She observed that citizenship education had also established the view that “the task of the citizen in a democratic society [was] to resolve problems ... albeit in a carefully prescribed, official way” (p. 56). The difficulty that arose from this approach was that social studies became the collection point for “any topic that can be termed ‘a problem’” (p. 56). This opened the subject to colonization by pressure groups who wanted to find a space in the curriculum for their particular interests – peace and development education, law education, environmental education – and, as explained in Chapter 3 - left open the ground for the content to be defined by “aggressive historians and geographers”. For McGee the solution was clear: “... citizenship as one of the key goals of social studies needs to be acknowledged openly and unashamedly” (p. 57). This would not only provide a defensible basis for the content of social studies but, properly conceived to include critical analysis of the *status quo*, it would also address the concerns raised by Archer and Openshaw. As Lockstone (1963) has argued, “a responsible and competent citizen is not, *ipso facto*, a supporter of the values of the society into which he [sic] happens to be born – he may well be their sworn foe” (p. 53). Thus the kind of citizenship education that McGee advocates is one that is not “safe”; and one that acknowledges its essentially political agenda.

The case made here for a citizenship education purpose for social studies is justified in relation to this curriculum history. It is not introducing a concept that is foreign to the subject; in fact, it is building on a long-standing tradition. But it is also heeding past criticisms. Firstly, it is specific about its citizenship education purpose in the very first sentence of the definition. This represents a shift away from an approach which sought to *accommodate* citizenship within social studies towards an approach whereby the direction and scope of social studies is *determined by* citizenship education. This approach, especially when informed by the theoretical and curriculum literature analysed here, addresses concerns about the atheoretical basis of the current curriculum, and McGee’s concern about the lack of a clear knowledge-base for social studies. Secondly, by being explicit about the participative dimension, and the critical

thinking and debating skills inherent in that dimension, the concern about the uncritical acceptance of values is, at least in part, mitigated. As the sense-making perspective on implementation developed in this thesis has explained, however, these will remain empty and optimistic claims unless they can be addressed by a clear and coherent design. Such a design is outlined in the next chapter.

The Need for a Citizenship Education Purpose

Until recently there has been very little discussion, outside social studies, of citizenship education in New Zealand. In spite of participating in a number of international benchmarking assessments in other subjects the Ministry of Education chose not to participate in the most recent IEA study on civic education (Torney-Purta et al., 1999). There has also been no targeted curriculum development similar to the initiatives undertaken in the United States, England and Australia. The first sign of any official acknowledgment of the need for citizenship education emerged in the Curriculum Stocktake Report (Ministry of Education, 2002). One of the recommendations of this report was that the outcomes of the national curriculum should be audited against a set of “future-focused themes” (p. 64). Although they were not fully elaborated, at least four of these themes had a citizenship education orientation – social cohesion, education for a sustainable future, bicultural and multicultural awareness, and citizenship. These themes reflected an emerging concern that is difficult to explain with any certainty³⁰ but three possible explanations are suggested below.

Low levels of civic participation

Two democratic principles underpin New Zealand’s political and social structures – the principle of political equality, the assumption that “all citizens are equal with respect to their right to decide the appropriate political course of their community”, and the principle of responsive rule, the notion that political actions must “correspond to the express preferences of a majority of citizens”(Saward, 1994). From these principles derive such participatory rights as expressing opinions, voting in elections

³⁰ The Stocktake Report (Ministry of Education, 2002) summarises more than two years of discussion but the report is largely confined to conclusions and recommendations rather than explanation.

and referenda, standing for office, and gaining access to the courts, ombudsman or tribunals, all informed by a free flow of comprehensible public information about options, arguments and issues (Beetham, 1994).

There is recent evidence in New Zealand that some of these participatory rights are in need of revival. In spite of considerable publicity about, and opposition to, an Auckland Regional Council rates rise in 2003, by the time of the 2004 local body elections a Herald-DigiPoll found that almost 90 percent of Aucklanders could not name one regional councillor (Beston, 2004). Voter turnout for the 2001 local body elections was the lowest in the past five elections leading the Minister of Local Government to comment that New Zealanders are “apathetic and indifferent” and to call for compulsory voting (Lee cited in Orsman, 2001). By 2004 the situation had deteriorated even further with less than 45 percent voting. The new Minister called for an inquiry claiming that such low turnout was “bad for democracy” (Carter cited in Tunnah, 2004). Even with the opportunity for more direct involvement participation is low. For example, turnout for the 1992 referendum on the electoral system was only 55% (cited in Catt, 1999, p. 70). Given the increasing desire of planning authorities to involve their local communities in decision-making about the future of their area such results are worrying. As the Chief Justice of New Zealand has commented:

Without active and knowledgeable citizens, the forms of democratic representation remain empty; without vigilant and skilled citizens able to act through our democratic institutions, there is no check on political tyranny. (Elias, 2001, p. 2)

This reflects concerns expressed elsewhere. Print has observed that the main factor in helping to galvanise support for public and bipartisan political action in relation to citizenship education in Australia was reports of low levels of civic literacy among Australian youth (Print, 2001). Similar motivations have driven the citizenship education initiatives in the United Kingdom with the Crick Report observing “worrying levels of apathy, ignorance and cynicism about public life” (Qualifications and Curriculum Authority, 1998, p. 8). The IEA stocktake of civic education across 24

countries was motivated by the concern that “increasing numbers of adolescents ... are disengaged from the political system, partly as a result of pessimism about finding employment.” (Torney-Purta, John, & Amadeo, 1999, p. 14).

Concerns about civic literacy

While there has been limited research into New Zealand students’ civic knowledge there are indicators of concerns similar to those in other countries. The lack of historical knowledge among New Zealand students discussed in the previous chapter led researchers to lament the lack of coherent knowledge of national history (Low-Beer, 1986) and the cultivation of social amnesia (Simon, 1992). The Chief Justice of New Zealand concurred that the position in New Zealand was similar to that reported in an Australian survey which found there was “very little knowledge of the system of government, of the division and balance of powers, and of the functions and independence of the Courts” (Elias, 2001, p. 3). The strongest current empirical evidence of civic literacy at the school level is provided by the National Education Monitoring Project’s (NEMP) Social Studies Reports (Flockton & Crooks, 1998, 2002). These reveal significant gaps in citizenship-related knowledge and skills among Year 4 and Year 8 students.

The 1997 assessments revealed lack of knowledge among Year 8 students about the meaning and function of such parliamentary roles as Prime Minister (only 17 percent were judged to have a “good” understanding of this role); government (15 percent); ministers (12 percent); and coalition parties (29 percent). The same students also had difficulty explaining how governments are formed and only 12 percent had a “good” or “very good” understanding of how laws are passed. A large majority of students at both Year 4 and 8 struggled to explain the meaning and significance of the make-up of the New Zealand flag and to give satisfactory answers when asked to explain an historical event and its consequences (Flockton & Crooks, 1998, pp. 21-35). The 2001 assessments showed an improved level of knowledge by Year 4 students about New Zealand history and students at both levels were able to identify distinctive symbols of New Zealand identity. Concerns remained, however, about Year 8 students’

knowledge of the parliamentary processes and only a small percentage of students knew how members of parliament are elected (12 percent) and what they do in parliament (15 percent). Approximately 10 percent of Year 4, and 50 percent of Year 8 students showed at least a moderate knowledge of the Treaty of Waitangi but the report commented that there was substantial room for improvement. Less than half the Year 8 students were able to explain the significance of the arrival of Captain Cook, of the arrival of the first Maori explorers, and of the winning of votes for women. Knowledge of immigrant cultural features and of elements of New Zealand culture and identity was limited. Only 6 percent of Year 4, and 16 percent of Year 8 students, were able to give strong or very strong responses to a task that required them to assess the suitability of a place for settlement.

It can justifiably be claimed that these results do not capture the full picture of citizenship knowledge because they deal largely with formal, adult knowledge. The claim being made in this thesis is that social studies also needs to develop the skills associated with active participation in contexts that are meaningful to students. The NEMP reports provide some insight into these skill levels. The 1997 assessments showed that Year 8 students participated well in a school council scenario but students at both Years 4 and 8 were less successful when it came to discussing a rule-making scenario that involved collaboration with others. Year 8 students found it difficult to suggest a strong problem-solving strategy when responding to a scenario about getting the school to put in a good drinking fountain. In a scenario that required students to consider different points of view about disability, students showed a strong tendency to take sides with only 2 percent of Year 4, and 4 percent of Year 8 students able to take a full and balanced view. The 2001 assessments reported less skill-related information but the tasks that compared 1997 and 2001 achievements revealed a slight reduction in the strength of debate among Year 8 students but an increase in the ability to reach consensus, and among Year 4 students decrease in both involvement in discussion and collaboration. These data reveal that it is not only formal citizenship knowledge that is lacking among New Zealand primary school students, but also that there is limited development of some of the important skills of citizenship – problem-solving,

understanding different points of view, discussion and collaboration. These skills, along with those of critical thinking and personal reflection, are increasingly important as informal means of citizenship participation become more predominant in our society. The Chief Justice has recently claimed, for example, that we live in a “talkback age” (cited in Misa, 2005) that offers black and white solutions to complex problems. The NEMP data show that we have a way to go in developing the skills in young people that will resist this form of generalisation and simplicity.

The changing nature of New Zealand society

In a plural society such as New Zealand, the concept of citizenship is complex and contested. As Heater (2004) explained, democratic participation simultaneously involves balancing the classic liberal principles of individuality, diversity and freedom – the concept of ‘pluribus’ – against the classic republican principles of unity, community and cohesion – the concept of ‘unum’. New Zealand is an increasingly diverse society with resultant tensions between commitment to New Zealand as a nation and commitment to coexisting regional identities (for example, the West Coast South Island, ‘Ngati Porou’ East Coast), to cultural identities and authority (for example, tinorangatiratanga³¹), to ethnic and religious identities (for example, new migrant groups), and to class and gender identities. The extreme pluribus position is tolerant and non-judgmental about all difference. This ultimate form of relativism not only challenges personal values but can also result in societal disintegration (Cortes, 1994, p. 6). On the other hand, unum extremism is just as potentially damaging because the demand for primacy of cohesion and uniformity builds fear of diversity. This can lead to oppression of rights for racial, ethnic, cultural and religious groups that are not ‘mainstream’ with the consequent potential for atomisation and marginalisation of groups who feel democracy does not work for them (Civitas International, 2001). The concept of unum is further complicated by the growing involvement of students in global electronic communities which, through their unparalleled and unrestricted diversity, challenge the relevance of such citizenship concepts as “national identity”.

³¹ Maori sovereignty.

In discussing the Alberta experience of curriculum development Thompson (2004) explains the role that effective citizenship education can play in an increasingly plural society. While acknowledging that citizenship education contributes to the development of a “Canadian spirit” and to the “building [of] a strong and united Canada” she supports the curriculum thrust in Alberta that argues that these goals can only be achieved through “recognising and respecting the diversity of Canadians” (§ 17). Thus in increasingly plural societies such as Canada and New Zealand, citizenship education that focuses on “multiple perspectives” and that are “grounded in students’ collective identities” makes a significant contribution to establishing a more legitimate, inclusive and “fluid” sense of belonging and contribution (§ 17). For Bruner (1996), building a sense of belonging and the capacity for contribution is essential not only for the student, but also for the well being of society. As he explained: “a failure to equip minds with the skills for understanding and feeling and acting in the cultural world is not simply scoring a pedagogical zero. It risks alienation, defiance and practical incompetence” (Bruner, 1996, p. 43).

The Challenge of the Proposed Purpose of Social Studies to Existing Schema

The justification for directing social studies through a citizenship education purpose faces two significant barriers. If the design suggestions developed in the next chapter are to have traction these barriers will need to be addressed. The first is that the very idea of citizenship education is challenging for many teachers because it has a common, but not generally well-received meaning. The second is that a citizenship focus has the potential to obscure the role of the disciplines even more than at present.

Common Understandings of Citizenship Education

The emotional impact of the term citizenship education should not be underestimated³². In the minds of some teachers it equates with practices such as flag-raising and the inculcation of patriotism and conformity. It also has a sense of idealistic, putting-the-world-to-rights zeal about it. Lockstone (1963) captured the nature of this objection many years ago when, commenting on the 1961 curriculum aim to “make a good person, a wise person, a just, and a well-informed one”, he observed that “it is highly desirable that all persons should be so – though whether, this side of Paradise, all can be so is another question” (p. 50). He detected in social studies a “do-gooderism” approach that was “not really interested in teaching a subject: they want to cut out a character” (p. 52). For others, citizenship conjures up images of old-fashioned “civics” - the tedious teaching of dry and, to students at least, meaningless formal processes of government. Related to this objection is the perception that citizenship is a western concept that is alien to indigenous people and, because of its potential unifying force, inappropriate in a plural society.

Barr’s (1996) research has shown that citizenship also conjures up very general images that do little to define social studies as distinctive. The four most common responses to Barr’s question about the nature of citizenship - understanding and respecting difference and diversity, relating to others as a member of a community, learning responsibility and acceptable attitudes and values, and thinking and decision-making – are by no means unique to social studies. They are, in one way or another, the preserve of most aspects of formal and informal education. By holding, however, to the all-encompassing and unfocused view that citizenship happens everywhere the advantages of deliberate teaching, sourced in a substantive body of content, is lost.

³² I have been unable to find any current written reaction from social studies teachers to the concept of citizenship but this section is based on many years of listening to anecdotal comment. Two recent experiences capture the tenor of this comment. After speaking to a Ministry of Education working party on the national curriculum one participant approached me to say that she liked the citizenship ideas presented but asked if I could find a better term than ‘citizenship’. At a subsequent social studies curriculum meeting my argument for a citizenship education purpose for the subject was met by one unelaborated response to the effect that if social studies took this direction that would be the end of the person’s involvement in the subject.

The failure of health education in the 1980's in New Zealand and of citizenship education in England prior to 2002 is witness to the problem of claiming that a particular area of knowledge is everyone's concern. Unfortunately it quickly becomes no one's concern.

Whatever weight these views of citizenship education hold, the issue for curriculum design is that they have to be acknowledged and addressed. The design will need to explain how the citizenship that happens in social studies is different from that which happens as students participate in the life of the school; and it will need to allay concerns about its potential tediousness and its tendency towards idealism and excess. One way of doing this is to ensure that the social science disciplines make a major contribution to its content. Herein, however, lies another problem.

Citizenship Education and the Role of the Disciplines

Most geography, history and economics teachers – the dominant social science subjects in senior secondary school – would be unlikely to immediately or enthusiastically claim that citizenship education was a significant purpose of their subject. To define social studies in citizenship education terms, therefore, risks cutting them out of any contribution to curriculum at all levels of schooling before Year 11.

The National Council for the Social Studies in the United States approaches this issue by claiming that the civic issues to which social studies attends – “such as, health care, crime and foreign policy” – are “multidisciplinary in nature” and that as a consequence “understanding these issues and their resolutions...requires multidisciplinary education” (NCSS, 2005). They go on to identify the contributing disciplines as “anthropology, archaeology, economics, geography, history, law, philosophy, political science, psychology, religion, and sociology, as well as appropriate content from the humanities, mathematics and natural sciences”. While there is no doubt that each of these disciplines does contribute towards the understanding of civic issues, the subject-knowledge backgrounds of New Zealand social studies teachers means that such an

all-inclusive disciplinary approach would be likely to face considerable implementation difficulties. The pool of time, expertise and commitment is simply too small to sustain such a breadth of disciplinary input. This conclusion is given further weight by Slater's (1993) observation, in the context of "humanities" teaching in the United Kingdom, that multi-disciplinary approaches are only effective when:

- teachers "understand the distinctive characteristics" of each contributing subject and recognize that curriculum development *between* subjects is "no substitute for developments *within* subjects" (p. 114). In other words, the integration of aspects of history into geography can improve geography but it does not make it a different subject: it is still geography.
- subject alliances support topics that *require* their contribution rather than forcing contributions to fit a particular integration philosophy. As Slater puts it: "three subjects in search of a theme are led by ideology, not learning. Humanities is a strategy, a curricular device, not a crusade or a doctrine" (p. 115).
- time is set aside to enable "considerable planning ... minimally for a year" (p. 115).
- the teachers involved in the alliance share "instinctive ecumenical temperaments and friendships" (p. 115) and an openness to learning across boundaries.
- the constituent parts are taught by the appropriate specialists: "indifferent geography taught by good history teachers, and vice versa, is a wasteful use of scarce resources" (p. 115).

Given these caveats about integration it is perhaps not surprising that in the United States, social studies continues to be referred to largely as "the social studies" and that the NCSS refers to its own role as "an umbrella organisation for ... teachers of history, geography, economics, political science, sociology, psychology, anthropology, and law-related education". There are also separate sets of standards for history, geography, civics and government, economics and psychology.

The difficulty that this discussion poses for future social studies curriculum design is that while the disciplinary distinctions apparent in NCSS social studies and inherent in Slater's criteria may appeal to secondary social studies teachers, they will only do so if the teachers understand how their discipline contributes meaningfully to a citizenship education purpose and only if they are satisfied that this contribution maintains the integrity of the subject. On the other hand, the more obvious the disciplines are made in the structure the greater the dissonance with primary teachers' current schema for, and background in, social studies. Design is going to have to manage the difficult tension of incorporating the social sciences and humanities in a meaningful and disciplinary honest way but not to such an extent that it alienates primary school teachers who are in fact the much larger group of social studies teachers.

The next chapter suggests how a future social studies curriculum design can be developed around a citizenship education theme in a way that heeds the lessons of design that have emerged from the analysis in the earlier sections of this thesis, and that addresses the potential barriers to sense-making and acceptance discussed here.

CHAPTER 8

Citizenship Education and Social Studies Curriculum Design

This chapter is a culmination of the analysis that has preceded it. It sketches the outline of a future curriculum for New Zealand social studies by drawing on the design propositions (p. 176) developed from the analysis in Parts One and Two of the thesis, and the citizenship education purpose discussed in the previous chapter. The recommended design is only partial: it points the way for future development but does not complete it in its entirety. Not only would such completion be beyond the intellectual resources of any one person; it would also be undesirable from the point of view of winning commitment to the suggestions made here. To map out the full design and to present it as a *fait accompli* would undermine the very intention of this thesis: namely, to inform the next phase of development.

The chapter begins outlining the external constraints on the design: the expectations of teachers and the requirements that national policy has already deemed necessary. It then proposes, within these constraints, an “essence statement” aligned to the citizenship education purpose of social studies, and a curriculum structure derived from this purpose. The content of the essence statement, and the curriculum structure, are explained in relation to the design propositions established at the end of Part Two of the thesis.

External Constraints on Future Social Studies Curriculum Design

Curriculum design at the national policy level does not develop in a vacuum. There are significant constraints on design freedom: some, the consequence of the implementation context; some imposed by the State.

The Implementation Context

The 1997 curriculum became official in 2000. In the three years prior to its official implementation and in the five years since there has been a considerable investment of resources in helping teachers to understand its intent. While this thesis has argued that the design flaws of the curriculum have been such that these sense-making attempts have been greatly inhibited, there is little doubt that many teachers, if for no other reason than the time they have put into developing new units of work and the money they have spent on purchasing new resources, have a significant attachment to the curriculum. The Ministry of Education itself has also invested heavily in the curriculum, most particularly through the two-year exemplar project that developed work samples illustrative of student achievement at each of Levels 1 to 5 of the curriculum. These were distributed to schools at the end of 2004. Investment is also evidenced by the self-reported satisfaction levels of teachers (McGee et al., 2003).

It is unlikely, therefore, that any major change in curriculum would be acceptable to teachers or to the authorities. It is significant that the Ministry of Education has named their two recent curriculum initiatives a “stocktake” and a “project” thus avoiding the criticism and resistance that would inevitably have come from teacher groups had the word “review” been used instead, and so soon after the full implementation of the national curriculum. This practical constraint poses a significant issue for the design task attempted here. Although the analysis in this thesis shows that significant design change is required if sense-making is to be enhanced, the nature of the change cannot be so great as to give the appearance of a new curriculum. On the other hand, the sense-making work of Spillane and others shows that if there is so little change that the new design appears to be business-as-usual then that is exactly what will happen – teachers will find the familiar and hold to current resources and practices. The task is not unlike that attempted in the 1981 *Education Gazette* statement that sought to clarify the 1961 curriculum, and the 1991 *Form 3 and 4 Social Studies Handbook* that attempted to do the same with the 1977 statement. These two initiatives illustrated how change can be introduced without undermining the familiar. The approaches they used –

modified focusing questions, simple reclassifications of content, reorganisation of content within familiar topics – suggest strategies that might be used in this curriculum development.

Ministry of Education Constraints

The other major constraint on design is the “givens” imposed on the process by the Ministry of Education. The *Curriculum Project* website states that “the recommended modifications to the current curriculum statements will build on the sound structure of the national curriculum” (Ministry of Education, 2004a). In other words, there is to be no fundamental structural change: the essential learning areas and, within these, the strands, levels and outcomes-focus will remain. The achievement objectives, however, “will be reviewed in each essential learning area”. This review process will be based on the development of “an essence statement that encapsulates the fundamentals of each learning area and clearly states the most important learning outcomes for students”. This statement will guide the subsequent process of “achievement objective reduction”. These revised achievement objectives will become the mandated curriculum with the current curriculum statements relegated to the status of “support documents”.

In summary, the Ministry of Education wants a smaller, more focused curriculum but one that retains the structural characteristics of the current curriculum and that enables the current curriculum statement to remain relevant in a supporting role. This desire reinforces the design challenge described above: too much duplication of the present curriculum will inhibit recognition of change; too much departure from the present so soon after its implementation will face resistance.

An Essence Statement for Social Studies

In December 2004 the Ministry of Education distributed to writing groups the parameters for the development of learning area essence statements (Ministry of

Education, 2004c). In this document, essence statements were defined as “a distinguishing verbal flag which signals, heralds, sums up the learning area in a way that reinforces and communicates its own particular identity, rationale and purpose”. The statements were required to be approximately 600 words. For each learning area, they were to include a rationale outlining its unique purpose; along with details of its “unique content”, the major learning goals for the students, and the major areas of learning (strands). The statements were to focus on knowledge and processes, rather than skills, and any variations to existing structures (strand titles) were discouraged through the requirement that such changes had to be “consistent with policy directions” and supported by “evidence” justifying the proposed changes. Somewhat confusingly, the statements, in spite of requiring a rationale, were not to include any statements “advocating for the learning area”. In summary, the statements were to be broad but concise; they were to capture the fundamentals and uniqueness of the learning area, especially its content, and they were to clearly state the most important outcomes.

In proposing an essence statement for social studies this thesis has taken these parameters into account but more fundamentally it attempts to express these requirements in a manner consistent with the sense-making framework and analysis that has been central to the thesis.

A Proposed Essence Statement for Social Studies

The proposed essence statement is outlined in Figure 19. The right-hand side of this figure outlines the content of the essence statement. The glossed text on the left-hand side adds comment explaining differences between this statement and the current curriculum. The significance of this glossed text, and the organisation of the statement itself, from a sense-making perspective is explained in the next section.

The current curriculum statement for social studies aims to “enable students to participate in a changing society as informed, confident and responsible citizens”. This is essentially a citizenship education aim but, as stated, it is difficult to assess the contribution and impact of social studies because other school subjects contribute to this aim and because much of this participation happens beyond the school.

The subject needs an aim that focuses more closely on *what schools can achieve in social studies*. This is not to say that other subjects and school practices will not continue to contribute to citizenship in important ways; just that social studies needs to be clearer about its *particular* contribution. This statement, therefore, focuses on *building the capacity to participate in human communities* and outlines social studies unique contribution to building this capacity.

This statement gives the social sciences more prominence than the current curriculum statement by *naming* the relevant social sciences and by giving them explicit status as the source of *important ideas*. This is not to say that students’ ideas are not important; rather that they need to be validated against the body of disciplinary knowledge that informs social studies.

Strand titles signal the key areas of understanding. The current strand titles have been simplified so that teaching can focus on the development of important ideas rather than on coverage. “Culture, heritage and place” incorporates aspects of the current culture and heritage, place and environment, and resources and economic activities strands. “Organisation and participation” renames the current social organisation strand to encompass multiple forms of organisation and to make the role of people more explicit.

The Aim of Social Studies

The aim of social studies is to build the capacity for students to participate in human communities and to contribute to the common good.

“Participate in human communities” refers to the pursuit of individual and group interests and aspirations; “contribute to the common good” refers to contribution to the wider community and to fulfilling responsibilities beyond personal or immediate group aspirations.

Achieving the Aim

Social studies will achieve this aim by *developing understanding of how human communities operate* and by *developing and applying the skills necessary for effective participation in human communities*.

Developing Understanding of How Human Communities Operate

By drawing on the content and methods of the social science disciplines – in particular, history, geography, economics, sociology and political studies – students will develop understanding of *important ideas* about how human communities operate. These understandings will be expressed as *achievement objectives* and developed in relation to the following *strands*:

STRAND 1: Culture, Heritage and Place – students will understand how communities develop a way of life and an identity based on their culture and heritage; how peoples’ sense of community and belonging to a place is influenced by flows of people, goods, information and images; the importance of belonging and identity to participation in communities; and the nature of, and responses to, challenges to cultural identity.

STRAND 2: Organisation and Participation – students will understand how communities make choices about the allocation of scarce resources and the impacts of these decisions; how communities confer rights and require acceptance of responsibilities; how forms of political and economic organisation develop and impact on rights and responsibilities; and how people respond to these impacts.

No other subject in the compulsory curriculum develops student understanding of New Zealand's history and geography; of New Zealand's political processes and of New Zealand's economy. The *Essential Learning about New Zealand Society* section of the current curriculum defines this knowledge but it separates it from the achievement objectives making it difficult to integrate and monitor. This statement makes the nature of this knowledge more explicit by including it as a curriculum strand with its own achievement objectives.

The achievement objectives within each strand do NOT need to be taught separately. Teachers are encouraged to make connections between achievement objectives at each level of the curriculum.

Because there is no direction in the current curriculum about the New Zealand content that needs to be understood at each level there is a hit-and-miss aspect to the development of this knowledge. This statement explains that the achievement objectives will help teachers direct this knowledge in a more coherent way.

STRAND 3: *New Zealand Society* – students will understand the significance of the status of Maori as tangata whenua; the nature and continuing importance of the Treaty of Waitangi; the influences of New Zealand's Maori and European heritages; migration and its role in shaping New Zealand's ethnic and cultural diversity; events, people and forces that have had, and that continue to have, significant and lasting influence on New Zealand communities and society, and their multiple and sometimes conflicting interpretations; New Zealand's forms of political and economic organisation; how New Zealand as a place, and how places within New Zealand, are distinctive and retain this distinctiveness in spite of change; and how people perceive and use places differently and the consequences of this.

Selecting Contexts to Develop Understanding about How Human Communities Operate

Understanding of important ideas about human communities will be developed in past and present contexts; and in contexts within and beyond New Zealand. New Zealand content will be included at each level in a coherent and substantive manner that develops a sense of historical sequence and geographical location.

Developing and Applying the Skills Necessary for Effective Participation in Human Communities

The capacity to participate effectively in society is partially built by developing the understandings outlined above, but it is also built by developing the *skills of participation*: the ability to source and critically assess relevant information, to follow an argument, to reason logically, to work co-operatively with others, to discuss, negotiate and debate in ways that respect difference, to resolve disagreement, and to develop the confidence to communicate their views to others and to listen and consider contrary views.

The current curriculum encourages teachers to apply the three processes to the Strand achievement objectives. This statement does not discourage this from happening but it establishes a context – topical issues - in which it *must* happen.

Note the difference between Social Studies and Health Education here. The focus in social studies is on public issues which promote consideration of the common good.

By way of simplification, the inquiry process described here integrates the three processes in the current curriculum - inquiry, values exploration and social decision-making – into a single process.

Unlike the current curriculum which defines the processes differently at each level, this statement explains that the SAME process will be applied at each level. It will be left to teachers to select issues and contexts that are most suited to the ages and backgrounds of the students they are teaching.

Selecting Contexts to Develop and Apply the Skills Necessary for Effective Participation

These skills are best developed in situations that are meaningful to students and that are significant for human communities and societies. At each level, therefore, students will examine a range of topical political, economic, social, cultural or environmental issues.

“Topical issues” are those about which groups in the community urge conflicting courses of action based on different value judgments and where any resolution is likely to cause significant objection. The focus in social studies is on the decision-making process associated with attempting to resolve public issues rather than issues of personal morals.

Topical issues will form a fourth curriculum strand within which teachers select issues of relevance to their students and communities and which promote consideration of the common good.

STRAND 4: Topical Issues - as they carry out inquiry into *topical issues* students at each level will learn to:

- clarify facts by distinguishing fact and opinion, by interrogating evidence, by detecting fallacies and by clarifying meaning
- clarify multiple historical perspectives
- acknowledge and unravel interconnected causes
- describe and explain values positions
- articulate an informed position and refinement of this position in response to new information and argument
- make decisions about appropriate action.

Through their inquiry into topical community issues students will develop a greater awareness of their own perspectives on issues that face societies, the basis of those perspectives and their possible consequences.

Figure 19: Proposed Essence Statement for Social Studies

(Note – the Essence Statement is outlined in the boxes on the right-hand side of this Figure. The glossed text to the left explains differences between this statement and the current curriculum)

A Commentary on the Essence Statement from a Sense-making Perspective

The analysis in this thesis, summarised in the Design Propositions at the end of Part Two (p. 176) has shown that, to maximise sense-making, a new essence statement for social studies needs to state a clear rationale for any proposed change and it needs to alert teachers to the nature of the change in a manner that engages their current schema and addresses likely misconceptions about the subject. Given social studies chequered history, and the Ministry of Education parameters for essence statements to define what is unique about the learning area, it also needs to make a clear and unequivocal statement about the purpose of social studies and the distinguishing features of its content and method. It must achieve coherence with this purpose through transparent alignment of curriculum elements, and retain scope for teacher flexibility without creating significant complexity.

Expressing the rationale for change in a way that connects to existing schema

There is some doubt that the Ministry of Education will accept the inclusion of a rationale *for change* because it does not form part of their essence statement specifications. Its inclusion also lengthens the statement well beyond the required 600 words³³. It is included here, however, because of its sense-making value and is expressed in a manner that attempts to address the Ministry restrictions. Its expression also acknowledges the extraneous cognitive load that arises from developing a separate, spatially-discontiguous statement about the rationale for change.

The rationale is glossed to the left of the essence statement and directly against the relevant sections of the essence statement. In this way it does not form part of the actual statement and it does not detract from the logic and flow of this statement. This manner of expression also reduces the pressure on representational holding that would be required if the rationale were included in a separate section of text. The nature of the changes, and the reasons for them, are explained directly beside the relevant curriculum element.

³³ The proposed statement itself is 785 words. If the rationale in the glossed text to the left of the statement was included then the word count would extend to 1354.

The rationale uses three approaches in attempting to connect to current teacher schema. Where the change is based on the reorganisation or renaming of curriculum elements a brief explanatory comment is provided - for example, the reasons for the change of strand titles. Where more substantive changes are included the explanation is strengthened by describing difficulties associated with current implementation – for example, the problem of the disconnection of *Essential Learning about New Zealand Society* from the strand achievement objectives; the lack of substantive development of New Zealand content. These statements run the risk that the 1942 curriculum faced by being critical of current practice but the criticisms have been deliberately phrased here as a critique of the *current curriculum* (for example, “there is no direction in the current curriculum about...”), not as a critique of *current practice*. In this way the essential point is made but teacher self-image is not undermined. The most common form of connecting to teacher schema is an adaptation of Wiggins and McTighe’s (1998) misconception alert. The alerts either affirm current practice where it is anticipated that teachers may interpret the new statement as rejecting these practices (for example, “this is not to say that students’ ideas are not important: rather that they need to be ...”) or, they explain what the change is **not** suggesting to avert possible misinterpretation (for example, “the achievement objectives within each strand do NOT need to be taught separately”).

The purpose of social studies and the distinguishing features of its content and method

For the reasons advanced in the previous chapter the proposed essence statement for social studies is organised around a citizenship education purpose. Unlike earlier social studies curriculum there is only one statement of purpose. The aim is stated in one sentence and the key phrases in the aim are immediately defined. These definitions acknowledge the potential for misunderstanding that can result from familiar language used in a different way, and from the use of language that is new to the subject (Hill, 2001). The phrase “participate in human communities” has been a poorly defined mantra of social studies for many years so there is considerable doubt as to how teachers might interpret it; the phrase “the common good”, while used

widely in the citizenship education literature, is completely new to social studies and so is defined to avoid confusion.

The distinguishing features of social studies content and method are defined in relation to the citizenship education purpose. The strands have been derived from the model of citizenship education developed in Figure 18 (p. 194). While the strand titles do not match the elements of this model they do reflect their intent. Rather than completely disrupting teacher schema with a set of new strand titles, aligned to a theoretical model of which teachers are unaware, the strategy adopted here utilizes existing titles but alters their emphasis. The strand titles in the essence statement use the familiar words “culture”, “heritage”, “place”, and “organisation”. Following the approach taken in the 1981 *Education Gazette* clarification of the 1961 curriculum, these words are given a different and more specific emphasis through altering the grouping of some of the words, and through adding new elements to them in the form of statements of intended student “understandings”. For example, while the theoretical model establishes “identity” as a central concept of citizenship education, this word has not been used as a strand title because understanding of the concept can be developed through a strand named in a familiar, but slightly altered, way; and through clarifying the understandings intended within the strand. The familiar “culture and heritage” is replaced with “culture, heritage and place” to emphasise the role of place in shaping community identities; and the strand is defined to include understanding of “the importance of belonging and identity to participation in communities; and the nature of, and responses to, challenges to cultural identity”.

Other shifts in meaning associated with the citizenship education purpose have been more deliberately signalled. “Topical issues” are a new inclusion designed to develop the skills of active citizenship in meaningful contexts. The statement attempts to reduce any possible confusion about this new element by defining the nature of topical issues (“those in which groups in the community urge conflicting courses of action...”), by identifying and naming clusters of issues (“political, economic, cultural or

environmental”), and through a misconception alert about personal moral issues to avoid confusion with the content and purposes of Health Education. The inquiry process associated with these issues is also new. For this reason its steps are defined using bullet points and its difference from the current three processes is acknowledged and explained.

The role of the social sciences has often been diminished in past social studies curriculum through poor alignment between curriculum intention and curriculum detail. As explained in the previous chapter there is also unlikely to be wide, immediate acceptance of citizenship education as an organising concept for history and geography. The ideas of these subjects, therefore, have been given much more explicit recognition within the essence statement than within the current curriculum. The subjects are named as contributing disciplines and specific examples of content derived from these subjects are included. The three senior school social science subjects are given particular prominence. The first two – history and geography – because of their connection to the schema of most secondary school social studies teachers, and the third, because of common misunderstandings of its role and importance. Each of these inclusions seeks not only to acknowledge the role of the disciplines but to illustrate the meaningful ways in which they can contribute to “citizenship that is participatory, pluralist and deliberative” (Barton & Levstik, 2004, p. 40).

The contribution of history

The knowledge component of history is acknowledged in the requirement to develop understanding, through the achievement objectives, of “events, people and forces that have had significant and lasting influence on New Zealand communities and societies.” Such content capitalises on history’s potential to promote an “expanded view of humanity” that confronts students “with the cares, concerns and ways of thinking of people different from [them]selves” (Barton & Levstik, 2004, p. 37). In so doing it helps students understand that there are “alternative ways of thinking and acting” that are “potentially as sensible as our own” (p. 37). Alternative ways of thinking are also promoted by the inclusion in the essence statement of the need for

students to understand the “multiple and sometimes conflicting interpretations” of historical events and experiences; in other words, to understand that history is not a single shared story but that it comprises multiple contested stories. Thus history is accorded a central citizenship education role in the proposed essence statement through its focus on the diversity of human experience and through developing understanding that “there are ways of being human other than our own” (p. 37).

History’s contribution to the notion of “common good” is also encouraged through two other inclusions in the essence statement. First, the methods of history promote “reasoned judgment ... weighing alternatives, determining significance and reaching conclusions” (Barton & Levstik, 2004, p. 36). The essence statement acknowledges this in the prominence given to such skills as “critically assessing relevant information”, “following an argument”, and “reasoning logically” within the nominated set of participatory skills. Second, the proposed Topical Issues strand contextualises this skill development within settings that are contentious and that “promote consideration of the common good”. Barton and Levstik (2004) view history as a major source of such contexts. They claim that:

Students should be exposed to historical topics that force them to consider issues of justice – the impact of racism, for example, or of gender roles, dictatorship, warfare, colonialism, economics relations, and so on. In addition, students should have the chance to discuss the justice of past events or social arrangements, as well as the justice of their legacy. (p. 39)

The contribution of geography

The contribution of geography to a curriculum based on citizenship education is less immediately obvious than that of history. There are, however, at least two ways in which the significant role of geography is made explicit in the essence statement. First, the essence statement introduces emerging ideas of place (Castree, 2003) to the understanding of the functioning of human communities. Thus community identity is acknowledged as being “shaped by flows of people, goods, information and images.” As Massey (1998) argues, we should be seeking to understand both the *roots* (culture and heritage) and the *routes* of people’s identity. The focus on the distinctive character

of places in the New Zealand society strand is also acknowledgement of geography's shift away from the nomothetic search for theory, law and generalisation about places back to the idiographic sense that places, while intensely interconnected and interdependent, remain unique in character and design (Gregory, 2003).

Secondly, geography's focus on understanding interactions and interrelationships among and between people and the environment contributes significantly to the development of participatory and deliberative citizenship. Tilbury (1997) identifies a range of important environmental and development issues central to participatory and deliberative citizenship, and to the Topical Issues strand proposed in the essence statement. There is a risk that without geography's holistic focus such issues as climate change, deforestation, land degradation, depletion of natural resources, overpopulation, drought, poverty and urban decay will be interpreted simplistically without the focus on relationships between, for example, the environment and development. The geographical perspective incorporated in the essence statement requirement to "identify and unravel the interconnected causes of issues" draws attention to the impact of the students' "own lifestyles, choices and actions" on the physical and social environment and also to the need to study environment and development problems in a multidimensional way (Tilbury, 1997, p. 112). Furthermore, the skills of "interrogating evidence", of "describing and explaining values positions" and of rational "decision-making about appropriate action" included within the essence statement each connect with geography's concern to ensure that students think critically, rather than naively, about issues affecting the quality of the physical and social environment, and that they are challenged to consider their own roles in contributing to more sustainable communities.

The contribution of economics

The suspicion with which economics has historically been regarded (Hutchings, et al., 2002; Nasman & von Gerber, 2002) is addressed in the proposed essence statement with the specific inclusion of the main organising idea of the discipline – namely, understanding "how communities make choices about the allocation of scarce

resources and the impacts of these decisions". While, this reference may be too obscure for most teachers without a background in economics, its presence in the essence statement will require elaboration through the achievement objectives in a way that is aligned to the central concern of economics. This will help address the current marginalisation of the discipline resulting from an achievement objective focus on "resources" without any direct reference to the key economic ideas of scarcity and opportunity cost. As Hutchings et al. (2002) argue, understanding of the ways that these and other related economic concepts play out in communities and societies are important for three reasons. First, the development of economic understanding empowers individuals to "cope with the everyday economics of earning, consuming, borrowing and saving" (p. 2); second, it enables the development of an informed and questioning citizenry; and third, it develops entrepreneurial skills that ultimately contribute to more prosperous communities. While this "empowerment" function of economics may appear self serving, when applied to Topical Issues it takes on a more critical edge as it informs the debate and discussion around public issues related to the promotion of the common good.

Alignment of curriculum elements

Considerable attention has been paid to alignment in the essence statement. One aspect of this alignment - the matching of purpose and content - has been described in the previous section. It is not only the fact of alignment that is important, however, but also the appearance of alignment; in other words, that alignment is sufficiently transparent for teachers to recognize its presence.

The essence statement has used headings to signal the elements of the statement and in the phrasing of those headings it has repeated the exact phrasing of the text (for example, "understanding of how human communities operate"). By retaining and consistently repeating these same words, the confusions associated with slightly altered phrasing, and potentially slightly altered meaning, are avoided. The statement also uses connectives to reinforce links between each section of the text. For example, the connection between the aim and the two elements involved in achieving the aim

(developing understanding of how human communities operate, and developing and applying the skills of effective participation in human communities) are reinforced by the statement that “Social studies will achieve this aim by...”. The two elements are themselves connected through the explanation that “the capacity to participate effectively in human communities is partially built by developing the understandings outlined above, but it is also built by developing the skills of participation”

Curriculum Structure

While the essence statement signals the broad intentions of the subject by its very nature it stops short of providing a template for implementation. It is the Ministry’s intention that such a template should be developed from the essence statement and that it should make explicit the strand and achievement objective structure of the curriculum. While the structure needs to retain eight levels of achievement objective, the Ministry is clear that there must be “fewer achievement objectives”, particularly at the foundation levels of learning (Levels 1 and 2). From a sense-making perspective a revised curriculum structure also provides the opportunity to reduce the complexities inherent in the current curriculum. This section proposes a possible design for social studies that is aligned to the essence statement, that achieves the Ministry of Education intention of achievement objective reduction, and that addresses the complexities of the current curriculum while still providing sufficient discretionary space for school-based interpretations that are consistent with the identified needs and interests of students.

The Curriculum Strands

If the social studies curriculum is to develop the twin dimensions of understanding and skill reflected in the essence statement, then the design of the curriculum needs to be aligned to both dimensions. The current curriculum attempted an accommodation between understanding (the Strands) and skills (the Processes) using a matrix structure. As explained in Chapter 5 this has not been entirely successful. The

knowledge strands dominate the physical organisation of the curriculum and feature prominently in the resources that have been developed to support the curriculum. A design that successfully accommodates the twin dimensions of social studies needs to resolve this dominance of one dimension over another. The strategy adopted here positions the knowledge and process dimensions of citizenship education in parallel with each other thus removing the competition that arises from a cross-cutting matrix (see Figure 20, p. 226). The knowledge section develops understanding of the three sets of important ideas stated in the essence statement. The labels for these sets of ideas become new strand titles. The fourth strand title – Topical Issues – develops the skills of participation via the inquiry process outlined in the essence statement.

It may be argued that while this design avoids the dominance of one dimension over the other it introduces a new problem – the separation of content and skills. Up to a point, there is some justification in this argument. Developing conceptual understanding is the predominant focus of the knowledge section; developing skills is the predominant focus of the process section. But these distinctions are not exclusive. Conceptual understandings develop as students engage with topical issues – in fact some of the issues are likely to be derived from the knowledge and understanding section of the curriculum. Likewise, the development of conceptual understandings in the knowledge section will very likely happen through at least some of the skills in the process section. The current debate, for example, around the design of the New Zealand flag might well emerge as a topical issue from within a study of national identity originating from the Culture, Heritage and Identity strand. Engagement with these debates in the manner suggested here will in turn develop and refine student understanding of the complexities of the concept of national identity.

As well as removing the competition between strands and processes, this design simplifies the inclusion of New Zealand content. The current curriculum requires teachers to integrate *Essential Learning about New Zealand Society* with the Strand achievement objectives. This has often been accomplished by check-listing (Samu, et al., 1999) but to the detriment of sustained engagement with New Zealand content in a

manner that develops a sense of historical sequence and of geographical location (Flockton and Crooks, 1998, 2002). The design proposed here gives knowledge of New Zealand society prominence alongside the conceptual and process strands. It avoids the eclectic mix of design that confuses the structure of the current curriculum and reduces cognitive demands associated with integrating New Zealand content within other, differently expressed, curriculum elements.

The design structure outlined in Figure 20 will need to be elaborated by developing specific achievement objectives. It is recommended, however, that even when this process is complete Figure 20 still be included because it provides a curriculum schematic that illustrates the relationships between elements. Such relationships, and the understanding that goes with them, are easily lost once the detail is added and the opportunity to reduce the cognitive load through visual representation is also lost.

| | KNOWLEDGE | | | PROCESS |
|---------|---------------------------------------------|--------------------------------|--------------------------|-----------------------------------------------------------------------|
| | Understanding How Human Communities Operate | | | Developing the Skills of Participation |
| | Culture, Heritage and Place | Organisation and Participation | New Zealand Society | Topical Political, Economic, Social, Cultural or Environmental Issues |
| Level 1 | 1 achievement objective | 1 achievement objective | 1 achievement objective | 1 local issue |
| Level 2 | 1 achievement objective | 1 achievement objective | 1 achievement objective | 1 local issue |
| Level 3 | 2 achievement objectives | 2 achievement objectives | 2 achievement objectives | 2 issues at least one of which must be local |
| Level 4 | 2 achievement objectives | 2 achievement objectives | 2 achievement objectives | 2 issues at least one of which must be local |
| Level 5 | 2 achievement objectives | 2 achievement objectives | 4 achievement objectives | 2 issues at least one of which must be local |
| Level 6 | 2 achievement objectives | 2 achievement objectives | 4 achievement objectives | 2 issues at least one of which must be local |
| Level 7 | 2 achievement objectives | 2 achievement objectives | 4 achievement objectives | 2 issues at least one of which must be local |
| Level 8 | 2 achievement objectives | 2 achievement objectives | 4 achievement objectives | 2 issues at least one of which must be local |

Figure 20: Possible Structure for a Social Studies Curriculum Aligned to the Proposed Essence Statement and Model of Social Studies as Citizenship Education

Achievement Objectives

At the most superficial level, the design proposed in Figure 20 reduces complexity because it reduces the number of achievement objectives. There are currently thirteen achievement objectives at each level. Consistent with Ministry requirements this design reduces the objectives to 4 at Levels 1 and 2; to 8 at Levels 3 and 4; and to ten at

other levels. Complexity, however, depends as much upon the nature of the objectives as it does upon their number.

The current social studies curriculum was deliberately based on open-ended objectives (Hunter and Keown, 2001). It was left to teacher judgment to decide how best to infuse these objectives with other structural elements within the curriculum (for example, *Essential Learning about New Zealand Society*; bicultural, multicultural, gender and futures perspectives; inquiry, values exploration and social decision-making processes). While the intention of such open-ended objectives was to maximise teacher flexibility and to accommodate student and community interests and circumstances, the complexities surrounding this flexibility have created a high cognitive load and implementation difficulties. As the theory of germane cognitive load suggests one way of ameliorating some of these difficulties is to *integrate* the current curriculum elements within the achievement objectives rather than leaving this complex, albeit flexible, process to teachers. For example, an objective that considers the concept of “national identity” as a subset of the “New Zealand society” strand could be written as follows:

Students will evaluate examples of the construction of national identity in New Zealand since 1840, and justify and disseminate recommendations on the ways in which New Zealand’s national identity should be represented to enhance inclusiveness into the future.

This objective draws on a current aspect of *Essential Learning about New Zealand Society* but it defines historical continuity (“examples of the construction of national identity since 1840”) more closely than at present and connects it with bicultural, multicultural and gender perspectives (“inclusiveness”). It also integrates these elements using aspects of the current inquiry process (“evaluate examples of the construction...”) and the current social decision-making process (“justify and disseminate recommendations”). This example also illustrates how an objective in the knowledge section of the curriculum can be written to include elements from the process section.

The full development of such achievement objectives, derived from the intended understandings listed in the essence statement, will require considerable work. The Ministry of Education requires understandings within each strand to be developed at eight sequential levels. The lack of obvious progression in the current curriculum has been such that teachers and resource-developers have largely ignored the idea of progression by achievement objective and taught the achievement objectives as discrete topics tagged to particular levels of schooling. If replication of this approach is to be avoided the curriculum writers will need to develop a form of progression that is conceptually sound and transparently sequential. Alternatively, and perhaps more appropriately, they will have to argue that the research base for such progression is so poor in social studies and that the sequential nature of learning so uncertain, that progression by level of schooling is the more appropriate approach. Whatever choice is made, what is critical from a sense-making point of view is that the design does not attempt, as the current curriculum does, to mix statements that encourage learning at multiple curriculum levels with a curriculum structure based on progression by level of schooling.

The objectives in the process strand of the proposed curriculum structure are less problematic from a progression point of view. By their very nature, processes describe teacher and student activity rather than predetermined outcomes. As Stenhouse (1975) has argued, what a curriculum should specify is “principles of procedure” (the process of learning) and “concepts”. Outcomes emerge from the interaction of these elements but they cannot be pre-specified. Thus, what needs to be defined in this section of the curriculum is contexts of study at each curriculum level along with achievement objectives that apply a common process of learning to these contexts.

Contexts of study: topical issues

The essence statement suggests that contexts for study should be teacher-selected topical issues. As the analysis in Chapter 7 showed, such flexibility can add to the complexity of curriculum decision-making. Without guidance in this area teachers may revert to textbook “issues” that, on the surface, meet the requirements of the

curriculum, but that lack topicality: or they may misinterpret the idea of “issues” and stray into territory that is more appropriately the province of health education – i.e. issues of personal and community moral behaviour. The design, therefore, needs to provide guidance for teachers on the nature of topical issues and their defining characteristics. The proposed structure attempts to avoid the personal moral focus by suggesting that the nature of these issues should be “political, economic, social, cultural or environmental”. The characteristics that define such issues are that they involve a specific problem about which different groups in a community urge conflicting courses of action; that they are of such significance that each means of resolution is objectionable to some groups of citizens and arouses protest; that they are concerned with value judgments and, therefore, cannot be settled on facts and evidence alone; and that they involve participants in a decision-making process (Stenhouse, 1971; Zevin, 2000).

A common process of learning

If students are to develop the skills of participation, the examination of topical issues needs to be based on an active decision-making process that encourages analysis, dialogue and self-reflection. The current curriculum defines three such processes but in practice there is much overlap between them. What is proposed in the essence statement and within the curriculum structure is that a single, integrating learning process should be used to develop student understanding of, and engagement with, topical issues. The proposed process is illustrated in Figure 21. It is based on a structure developed by Hill (1994) but also incorporates ideas from approaches that are related to the concept of active citizenship – the jurisprudential inquiry model (Oliver and Shaver, 1966; Joyce and Weil, 1986); issues based teaching (Zevin, 2000); and teaching for intercultural understanding (Bennett, 2002). As with the curriculum structure diagram (Figure 20, p. 226), this diagram offers a schematic that helps teachers connect the different but closely related elements.

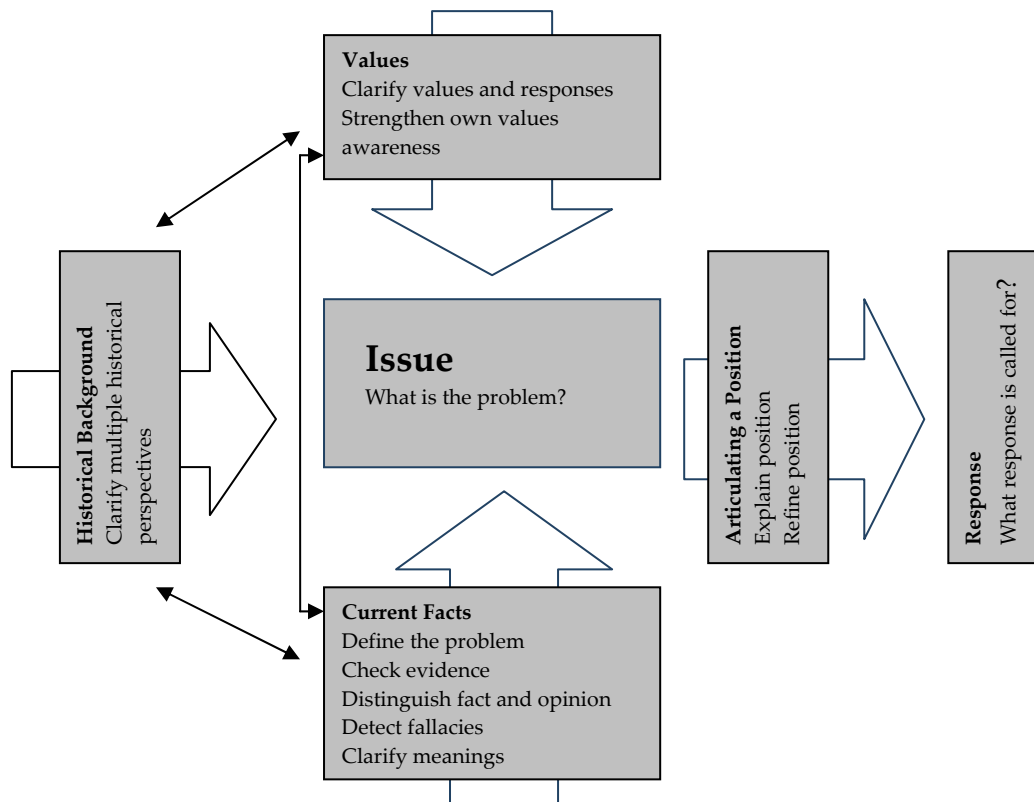


Figure 21: A Possible Process for Approaching Topical Issues

As students engage with the investigation of a topical issue, they clarify the facts that are immediately pertinent to the issue. This clarification goes beyond simple identification. It requires students to clarify the nature of the problem associated with the issue, to check evidence used to support claims, to distinguish between fact and opinion, and to clarify meanings and uses of words that are central to the issue. Given the often long and complex historical basis of most issues students need to track these origins and to develop awareness that the origins are contested on the basis of differing interpretations, often between minority groups and macro-culture, of past events. Values – judgments about good and bad, right and wrong – are at the heart of topical issues. Students, therefore, need to be able to clarify these values and the ways in which they are influencing responses to the issue. They also need to locate their own values position on the issue and to appreciate that this is not universally shared and may differ profoundly from that held by others. These considerations help students to

articulate³⁴ a position on the issue that recognises the inherent values conflict, that weighs the desirable and undesirable consequences, and that advances reasons for its selection. Active citizenship, however, requires dialogue. As Larson and Keiper (2002) explain, this involves "... much more than merely presenting a point of view to others. It involves being receptive to others' comments and having a willingness to refine one's current level of understanding" (Larson and Keiper, 2002, p. 11). The initial position, therefore, is refined as students dialogue with those who hold alternative positions, as they examine resolutions to other similar situations, and as they recheck the factual assumptions behind their own position (Oliver and Shaver, 1966). On the basis of this process students decide upon the response they consider most appropriate in relation to the issue.

Topical issues, process of learning and achievement objectives

The Ministry of Education requirement for an outcomes-focused curriculum defined at eight progressive levels complicates the expression of the Topical Issues strand. The current curriculum attempted to level the three processes but this approach merely added to conceptual confusion because it was inconsistent with the design logic advanced by Stenhouse (1975), and understood intuitively by teachers, that the same process can be successfully applied at any level. Difficulty depends upon the context to which the process is applied; it does not reside within the process itself. This suggests two possible solutions to the statement of achievement objectives in this strand. The first is to state the same achievement objective at each level and to require teachers, within the guidelines suggested above, to select topical issues that are appropriate to the age and abilities of the students they are teaching. Thus, the single achievement objective might be:

Students will present the results of their inquiry into a topical issue demonstrating their understanding of the current facts, the historical background and the values-base associated with multiple perspectives on the issue. They will articulate a position on the issue and demonstrate the ability to refine this position in response to contrary evidence. They will recommend a course of action in relation to the

³⁴ Given the oral nature of much debate around topical issues students need to develop the ability to articulate their position in both oral and written mode.

issue and acknowledge the difficulties inherent in this possible resolution.

The advantage of this approach is its simplicity. The repetition of the achievement objective from level to level will also reinforce teacher understanding of the nature and constituent parts of the process making it more likely that it will become ingrained in teaching. The disadvantage is that the selection of an appropriate topical issue relies on teacher judgment of student abilities. While this in itself is not necessarily problematic, when combined with issues of manageability and resource provision it is likely that all students in one class, irrespective of ability will study the same topical issue.

A second possible approach would be to distinguish levels within the strand by prescribing and defining the issues at each level. In this case the achievement objectives could be expressed in a manner similar to the approach taken in the New Basics curriculum (The State of Queensland, 2004): in other words, they could be framed as “rich tasks” accompanied by assessment criteria. An example from the New Basics project illustrates this approach:

Students will work with a local community to develop a plan for improving an aspect of the wellbeing of this community and then enact the plan, modifying it as necessary. They will evaluate the level of success they experience in enacting their plan and, where necessary, recommend future actions.

This task is accompanied by a description of the “desirable features” of the completed task at “high quality” and “acceptable” levels of performance:

High-quality performance is evidenced by:

- a well considered plan that is collaborative, innovative, practicable, feasible, and reflective of genuine community concerns;
- flexibility in planning, that indicates thoughtful responses to rising concerns and serious reflection on ongoing evaluations;
- serious, sensitive and tenacious involvement with a community plan.

Acceptable performance (successful task completion) is evidenced by:

- feedback from the community where there was student involvement, that a plan had been undertaken in good faith;
- an evaluation of the plan that is indicative of some student learnings having occurred.

These criteria would need to be adapted to more closely reflect the process depicted in Figure 21 (p. 230) but they illustrate one way in which the requirement to establish an outcomes focus for each curriculum strand could be met. The advantages of this approach are that the standard is more clearly defined nationally with the levelling determined by more widespread consultation than is possible for any single teacher or school. It also more closely reflects the provision of supporting examples encouraged by Hill (2001) to improve teacher understanding of curriculum intention, and the “worked example” approach that has been shown to reduce extraneous cognitive load. As Cooper (1998) explains, worked examples shift mental resources away from working out what the pieces of the curriculum puzzle mean and how to put these pieces together into a coherent teaching plan, towards a focus on what the example is showing about the way the curriculum is encouraging students to be taught, and to learn. The description of such tasks is also likely to stimulate resource provision to support teachers and students in the achievement of the standard. The most significant disadvantage is that there is a risk of losing topicality unless new sets of tasks are developed on a regular basis (as happens in Queensland). This approach also faces a similar problem to the common achievement objective approach described above in that manageability constraints are likely to mean that all students in a class, regardless of ability work on the same task.

Conclusions

It has been argued that if New Zealand social studies is to position itself more strongly within the New Zealand curriculum it has to carve out a distinctive purpose and that

this purpose should be based on the goals of citizenship education. It has also been argued that for this purpose to be served effectively the curriculum design needs to reduce the complexities and misalignments in the current curriculum. The proposed curriculum design model, while only sketched in broad terms here, illustrates one approach to establishing alignment between a citizenship aim and a curriculum structure, and to reducing curriculum complexity. The model accommodates the constraints of retaining teacher familiarity and an outcomes focus by using strand titles that are similar to the present ones and by retaining achievement objectives; it reflects the twin dimensions of citizenship education and gives them parallel status rather than the competing status that arises from a matrix structure; it uses the key concepts of citizenship education identified from international curriculum as knowledge organisers (i.e. strand titles); and it retains some teacher and student flexibility by enabling selection of topical issues.

It does differ, however, from the current curriculum in some significant respects. It reduces the number of strands and, thus, the number of achievement objectives; it integrates *Essential Learning about New Zealand Society* into the Strand structure and the Perspectives sections of the current curriculum into the achievement objectives, thereby mitigating some of the complexity and confusion that exists with the current eclectic design; and it integrates the current three processes into one process that reflects the skill requirements of active citizenship.

Like citizenship itself, however, it may be asking too much to get this right first time.

As Heater comments:

The truth is that the ideal citizen must be a paragon of multiple virtues, who brings to the fore different qualities according to the circumstances ... One may realistically accept that the truly good citizen exists only as a perfect model laid up in a Platonic heaven, but one needs a term to define the ideal (Heater, 2004, 198)

The same may well be true of curriculum.

CHAPTER 9

Summary and Further Work

This thesis originated in the practical problem of preparing an essence statement and revised curriculum structure for New Zealand social studies. The investigation of this problem was built around three research questions, each of which was sourced in the idea that curriculum design is a resource for teacher learning about the subject it represents and about the requirements of teaching the subject. The first question sought to develop a theoretical framework for understanding the characteristics of design that enhance sense-making by teachers and other implementing agents. The second examined the characteristics of past social studies curricula with the aim of identifying the design issues inherent in representing the subject and their implications for sense-making. The final question drew on the analysis of the previous questions to recommend parameters and structures for a future social studies curriculum design that operates more effectively as a resource for teacher learning about the subject. The findings related to each of these questions are examined in this chapter along with a discussion of their limitations and recommendations for further research.

Research Question One: What does the research literature reveal about the characteristics of curriculum design that enhances sense-making by implementing agents?

The analysis of the process of sense-making in curriculum implementation arising from the first research question established that sense-making is the result of interactions between individual cognition, the social context of cognition (situated cognition), and the nature of the policy signals (design). These interactions are summarised below.

Interactions between Design, Cognition and Implementation

Figure 22 contrasts a traditional view of the relationship between design and implementation with the cognitive view argued in this thesis. In the traditional view teachers make decisions about implementing curriculum policy on the basis of will, or on the basis of insufficient knowledge or resources. Unacceptable adaptations of curriculum are then addressed through interventions in the form of teacher professional development, or resource provision, or revised regulations. The alternative cognitive view, developed from the empirical policy implementation of Spillane and his colleagues, is that teachers genuinely try to make sense of what policy (expressed in curriculum design) is requiring of them. In so doing they may either understand requirements or they may misconstrue them. Either way, their implementation decisions are based on a prior cognitive process of attempting to learn what the policy is requiring of them. This does not mean that quality implementation is a linear process of alignment to a single 'correct' interpretation of policy. What it does suggest, however, is that by enhancing the sense-making qualities of design, implementation decisions are better able to be based on deliberate and defensible adaptations that are 'accurate' in the sense that they are coherent with intention, rather than inadvertent, "lethal mutations" (Brown and Campione, 1996). Thus design, while not a determinant of implementation makes a significant contribution to that process.

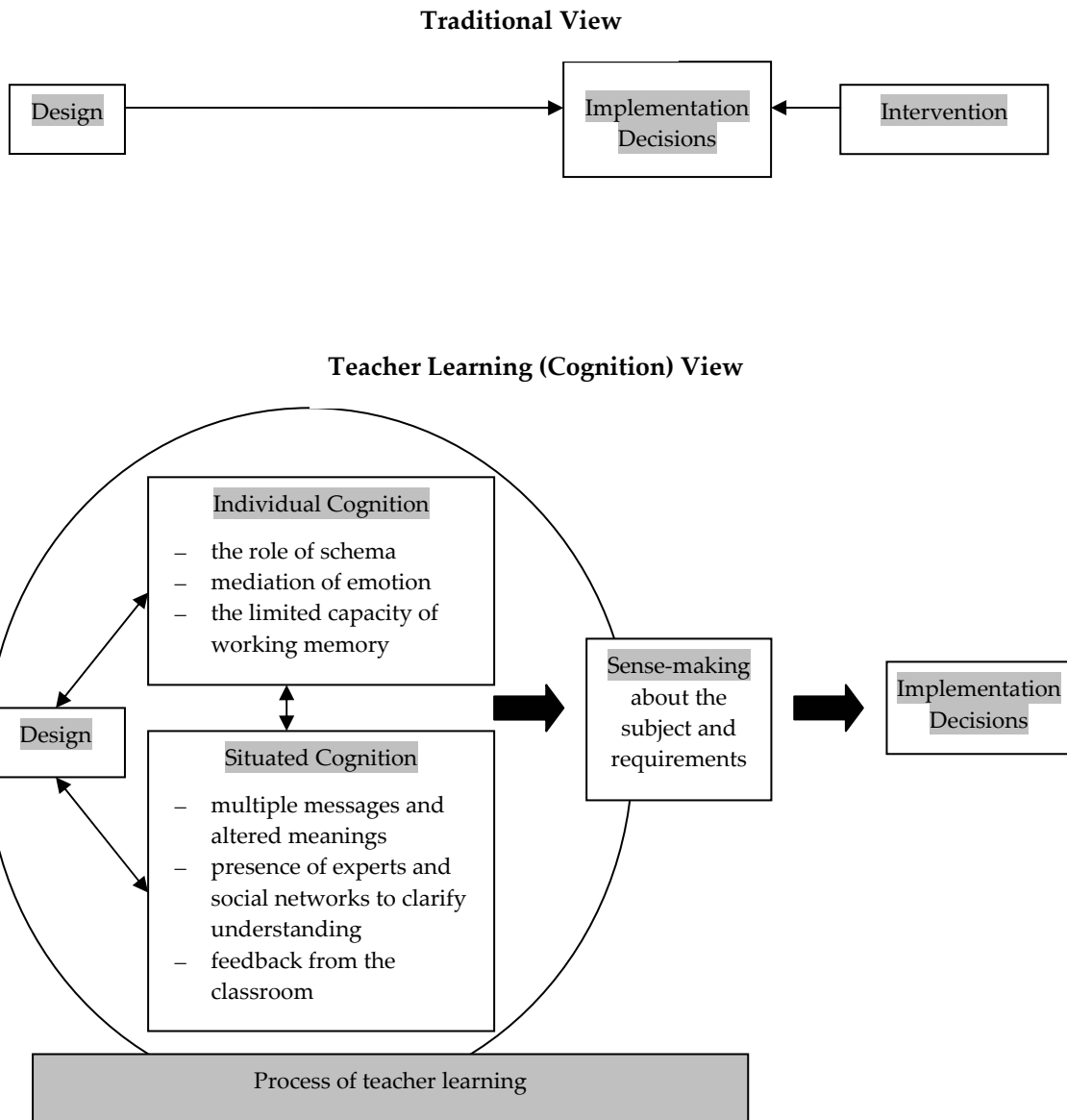


Figure 22: Interactions between Design, Cognition and Implementation

Summary of Design Criteria

The analysis in Part One of the thesis argued that design can enhance sense-making by incorporating characteristics that are consonant with processes of human cognition – especially the pattern-making role of schema and the limited capacity of working memory. The analysis identified six main design characteristics.

The first three characteristics of effective design primarily sought to address the automatic and pattern-making nature of schema that supports the conservation of

existing understandings and that draws attention to surface features that are consistent with those understandings. Thus it was argued that design needs to clearly communicate a policy rationale so that attention is focused on underlying intentions; that it needed to be alert to the meanings (schema for the subject) that implementing agents are likely to be bringing to the new policy and to recognise the misconception that these meanings might create; and that it needed to integrate principles and examples so that policy intentions were embedded at the level of detail most likely to be attended to by implementing agents.

Design also needs to attend to the limited capacity of working memory. Given that curriculum design incorporates multiple, interacting elements, its very nature imposes a relatively high intrinsic cognitive load. If design compounds that load with poor representation of curriculum elements and requirements then the combination of intrinsic and extraneous load is such that sense-making is inhibited. Thus three further design characteristics were proposed along with aforementioned integration of principle and example which itself reduces extraneous cognitive load by incorporating multiple requirements at the level of teaching examples. The three additional characteristics were the use of graphics to illustrate the interconnectedness of curriculum requirements and to utilise the full capacity of working memory by accessing dual channels (visual and verbal); the use of logical text organisation and signalling devices to reduce the load associated with connecting spatially discontinuous information; and the development of an internally coherent design that avoids contradictions.

These characteristics were presented as a set of six criteria for appraising the sense-making qualities of curriculum design (p. 62). They formed the background to the analysis of past curriculum design in New Zealand social studies associated with the second research question. The discussion below reviews and summarises the relationships between these design criteria and past curriculum designs in New Zealand social studies.

Research Question Two: What design patterns are evident in the four official expressions of social studies curriculum in New Zealand – 1942, 1961, 1977 and 1997 – and what are the likely implications of these patterns for sense-making?

Viewed from a cognitive perspective past curriculum designs have posed some significant sense-making challenges. These challenges fall into three broad groups – the first relate to the challenge of communicating shifts in meaning; the second, to the challenge of achieving coherence around an agreed purpose; and the third to accommodating flexibility.

Communicating Shifts in Meaning

The analysis of reform intentions within New Zealand social studies curriculum designs has revealed that the communication of shifts in nature and purpose, and consequently the acknowledgement of implementing agents' schema, has been very uneven. In some cases (1942 and 1981 *Education Gazette*) the rationale for change has been communicated in a manner critical of past practice. This approach carries the risk that understanding and acceptance will be compromised by conflicting values and emotions.

A more common approach has been to include reference to previous meanings without explicitly acknowledging them as such. The problem with this approach is that it risks signalling to teachers that nothing has changed and increasing their inclination to regard the curriculum as nothing new. Even more significantly from a sense-making perspective, while previous meanings have been alluded to they have often not been carried through into the detail of the design. This has been particularly evident in the failure of each design to embellish the espoused connections to history, geography and the other social sciences thus making it possible for misconceptions about the nature and purposes of the subject to thrive.

Nowhere is the failure of design to address misconceptions more evident than in the 1997 curriculum. In this curriculum teachers were required to completely rethink the idea of progression by topic with the idea of progression by pre-specified outcome. There was, however, no acknowledgement of, or explanation for, this reform idea, nor any recognition that teachers might misunderstand the new approach. Rather, teacher understanding was assumed on the basis that this change was part of an overall shift in national curriculum policy. But this assumption took no account of the fact that most secondary teachers of social studies had no prior experience of such a shift and that, for primary teachers, the shift had been experienced within other curriculum areas that represented it quite differently. The result has been the complete undermining of the national curriculum directive, and the espoused purpose of the curriculum, to reflect *through the achievement objectives* multiple levels of learning at the same level of schooling.

Ironically, the most successful communication of shifts in meaning from a cognitive perspective has been achieved not through new curriculum statements but through revisions of existing statements. The 1981 *Education Gazette* revision of the 1961 curriculum and the 1991 *Form 3 and 4 Social Studies Handbook* revision of the 1977 curriculum both took elements of the existing curriculum with which teachers were familiar and illustrated how they could be modified to meet new requirements. While these design devices were largely untested, from the theoretical stance argued here, they reflect an approach to design that is empathetic to the cognitive and emotional processes of implementing agents because they both connect to, and help shift, schema at the critical level of implementation detail without entirely rejecting the value of past practices.

Achieving Coherence around an Agreed Purpose

The most persistent difficulty that New Zealand social studies has faced has been the lack of a clear and agreed purpose. Each of the curricula has expressed multiple purposes and while these have not necessarily been contradictory, the manner in

which they have been expressed has not assisted sense-making. This is a critical issue in social studies because the overall domain knowledge of many teachers for the subject, drawing as it does on a wide range of social sciences, is not strong. Teachers are also often conflicted by the on-going debate about the nature and purposes of the subject and by internal school pressures, or personal preferences, to prioritise other subjects. For these reasons design has to work harder in social studies than in many other subjects to integrate multiple purposes.

Such integration has not been strongly evident in past designs. The relationships between purposes have either been acknowledged in a perfunctory way (1942) or, more seriously, through the use of a disconnected style of expression that avoids the use of connectives (1977, 1997), and which leaves it up to implementing agents to work out the meaning for themselves. This assumes, especially in the case of the 1997 curriculum, which includes 44 separate purpose statements, a level of commitment to implementation that, given the other priorities on time, is likely to be beyond the cognitive and emotional resources of all but the most specialist social studies teachers.

This difficulty may not have mattered as much had the integration of purposes been achieved at the level of curriculum detail most commonly attended to by teachers. The alignment, however, within each curriculum between statements of general purpose and implementation detail has seldom been strong and explicit.

The inclusion of multiple purposes has also created internal contradictions in design. This is particularly evident in the 1997 curriculum where the learning processes were artificially forced into a series of achievement levels independent of the sophistication and complexity of content to which they were applied. In addition, the only prescribed content within the curriculum, which was more amenable to description by level, was not so described. Such contradictions work against the very integration that is required in a design that attempts to achieve multiple purposes, especially when the audience for that design is not necessarily giving priority to the subject it represents.

Accommodating Flexibility

The desire to preserve teacher flexibility in the selection of content has been a consistent feature of past designs. This non-prescriptive approach, while respecting teacher autonomy and local circumstance, adds to complexity because it leaves decisions about the integration of multiple elements to teachers. This “element interactivity” in turn adds to cognitive load creating a tension between flexibility and complexity. One response to complexity has been for teachers to base their teaching on the “recommended studies” listed in the curriculum. Teachers, however, commonly selected the content of these studies on the basis of the topic title rather than selecting content that reflected the specific elements, and their intended interactions, set out in the curriculum. Thus flexibility and complexity collided, with teachers’ responses to complexity reducing both flexibility and curriculum alignment.

The 1997 curriculum design retained the flexibility that had characterised earlier curriculum but added further complications. Recommended studies were replaced with accountability requirements that ensured particular curriculum elements were addressed in a two-year period. While this need not have added significantly to complexity it did so because there were so many accountability elements (eleven) and because each was phrased in an open manner that required thoughtful and, often, researched interpretation. Furthermore, extraneous cognitive load was not well managed. The interactions between elements were not supported by clear diagrams, and the elements and their description were spread across 58 pages of text thereby increasing spatial discontinuity. The integration of achievement objectives and examples that had characterised the Draft of the curriculum was also removed as a result of political pressures. In many ways the curriculum reflected the gulf that Hill (2001) observed between curriculum designers who are passionate about social studies, and teachers whose personal teaching preferences, or school priorities, lie in other curriculum areas. The flexibility espoused by designers is actually illusory if it is surrounded by such complexity and accountability that, in order to reduce cognitive load, the details of curriculum intentions are either ignored or are paid lip-service.

Research Question Three: What parameters and structures should inform the process of social studies curriculum design currently being undertaken by the Ministry of Education in order to improve sense-making and to enhance the quality of future implementation?

The motivation for this thesis was to contribute to the review process that is currently being undertaken in New Zealand social studies as part of the national *Curriculum Project*. The application of a theoretical cognitive framework of analysis to the history of New Zealand social studies curriculum design summarised above reveals significant lessons for future design. These lessons, framed as design propositions, are outlined below.

Design Propositions and Curriculum Recommendations

In order to contextualise these propositions within the current Ministry of Education initiatives, they are integrated with the essence statement and curriculum structure recommendations advanced in Part Three of this thesis.

Design Proposition One: The design needs to clearly explain the rationale behind any changes in content and purpose.

The major shift advocated in the recommended design is the organisation of the design around a citizenship education purpose. The reasoning behind the shift is explained in the notes that accompany the essence statement as a clarification, rather than replacement of, current intention. It is also argued that the change better positions social studies as a distinctive contributor to an overall goal of schooling by isolating its unique contribution to the curriculum.

Design Proposition Two: The design needs to acknowledge existing schema for the subject by integrating where possible any changes in emphasis within structures and approaches that are familiar.

The design aimed to build on two prevalent, existing understandings – those related to the role of the social sciences in social studies, and those related to the current curriculum structure.

The social sciences are named and their contribution to the aim is defined. In this way the social sciences are not positioned as competing disciplines but as sources for understanding and pursuing the main aim. In so doing their role is transparently strengthened. This role is further reinforced by including within the strands content that is clearly connected to each of the disciplines. Teachers do not, therefore, have to force their disciplinary preferences onto the subject because they are acknowledged and given meaning in the design.

The recommended changes to strand titles are potentially damaging to acceptance. The current curriculum has only been in official use since 2000. Any change in the wording of the strands is likely to be seen as undermining significant work and resourcing around the current curriculum. This difficulty was approached by compromising on the titles that would have been most desirable from a theoretical citizenship education point of view – identity, rights and responsibilities, organisation, and participation – and by using titles that were familiar but consistent with this theoretical preference.

Design Proposition Three: The design needs to consider any misconceptions that implementing agents might hold in relation to the reform ideas and address these by way of “misconception alerts” that explain not only what the reform is but what it is not.

Ironically, given the focus of the recommended design on citizenship education, one of the greatest risks to its understanding and acceptance is the use of the term “citizenship” because of its conflation with previous understandings associated with “civics.” The design approaches this potential misunderstanding by avoiding the use of the word “citizenship” but by embedding in the definition the essence of citizenship education – the capacity to participate in human communities and to contribute to the common good. The notion of “common good” is immediately defined to reduce potential misunderstanding about the use of this new term.

The introduction of a new strand entitled “Topical Issues” also has the potential to create misunderstanding. The scope of issues under such a broad title is vast and may lead teachers to interpret the strand as completely permissive to the extent that issues that have very little connection with a citizenship education purpose may become prevalent. The design attempts to mitigate this by establishing criteria for the selection of topical issues.

Misconception alerts are used to clarify intention where the new intention differs from current understanding and practice. Thus the change from processes differentiated by curriculum level to a single process descriptor replicated at each level is explained with reference to current practice (“unlike the current curriculum ...”) and with attention drawn to the new practice.

Design Proposition Four: The design needs to be developed, and transparently structured in its organisation and expression, around a clear and unambiguous purpose.

The citizenship education focus has already been explained. The curriculum expresses a single aim aligned to this purpose. The related curriculum elements are derived directly from this purpose. The design uses two main textual devices to make this derivation obvious. The layout of the essence statement makes use of headings that repeat the essential components of the aim. While this generates wordy headings it makes connections between the text and the curriculum structure more transparent than shorthand titles which have the potential to be misinterpreted. The text also makes deliberate use of connectives to signal links between text elements and reduce the likelihood that important relationships will be overlooked.

At a deeper level, internal coherence has been achieved by formatting each curriculum element in a manner consistent with its purposes. Thus the strand content is expressed in achievement objective format as required by the *Curriculum Project* but the inquiry process is not forced artificially into this format in a way that is inconsistent with its

purpose. This purpose is more logically represented as a “principle of procedure” (Stenhouse, 1975) than as a set of levelled achievement objectives.

Design Proposition Five: The design needs to support understanding of curriculum structures with charts and diagrams that are aligned with, and make explicit the connections to, the text.

The curriculum structure and recommended inquiry process are represented schematically and consistent with the language and sequencing of the text to reduce the pressure on representational holding associated with making these connections from the text alone.

The essence statement itself is presented as a form of diagram. The statement includes explanations glossed in left-hand margin. The inclusion of explanation alongside the text reduces the spatial discontinuities associated with separated presentation and, therefore, reduces the extraneous cognitive load for the reader. Given that is argued that these explanations – connected as they are to rationale, schema and possible misconceptions - are critical to sense-making it is important that their impact is not diluted by separating them from the essence statement in a way that places unnecessary pressure on representational holding.

Design Proposition Six: The design needs to reduce complexity by simplifying requirements and by integrating curriculum elements at the level of detail most likely to be attended to by teachers.

The recommended curriculum structure substantially simplifies requirements. All requirements are included within four curriculum strands and within these strands the number of achievement objectives has been reduced at each level. Although the design has only been partially developed at the achievement objective level of detail, the recommendations advocate the expression of objectives in ways that integrate multiple curriculum elements. It is also recommended that New Zealand content be developed through a strand with its own achievement objectives. In this way teachers are not left to make connections between New Zealand content and separately expressed achievement objectives as required by the current curriculum. Likewise, one of the recommended approaches for developing achievement objectives in the Topical Issues

strand is referenced to the New Basics “rich task” approach that, by its very nature, integrates multiple elements.

Design Proposition Seven: The design needs to acknowledge that compulsion and flexibility are not mutually exclusive.

While the curriculum recommendations propose a clearer, simpler and more prescriptive structure than at present it is not suggested that this prescription is such that teacher discretionary space is eliminated. Rather it is suggested that teachers are left to make content choices within a structure that ensures that important conceptual understandings and participative skills are addressed. Likewise, while the process for investigating topical issues is prescribed, the contexts to which the process is applied are largely left to teacher choice. In this way the complexities associated with complete flexibility are reduced and there is more certainty about the understandings and skills that students will develop. The curriculum is not so constrained, however, that teacher professionalism and student interest and needs are not respected.

Limitations of Findings and Future Work

This thesis began by integrating Spillane’s research findings about sense-making processes with research into the cognitive load theory to develop a set of criteria for effective curriculum design. It used these design criteria to analyse four historical curriculum documents in New Zealand social studies and, on the basis of this analysis, the criteria were refined into a set of design propositions. These were used in turn to develop recommendations for a future design. While it has been argued that these recommendations have significant implications for the current process of curriculum design in New Zealand - not just in social studies but across all curriculum areas – there are three main areas where the findings need to be further scrutinised. The first is the need to test empirically the theoretical claim that effective curriculum design, based in the propositions developed here, can enhance sense-making and teacher learning about curriculum intentions. As Davis and Krajcik (2005) explain:

Design of any educational innovation involves iterations of developing, implementing, testing and refining ideas. Initial designs should be based on theoretical understandings of goals combined with informed intuitions about best practices. Once initial design approaches are implemented, they are refined on the basis of empirical study. (p. 4)

This thesis marks the first phase of developing theoretical understandings. Subsequent iterations will lead to their refinement and to the development of an ultimately more powerful and influential design. The second area of scrutiny is around the selection of citizenship as an organising framework for the recommended design. There are other possibilities that may achieve even greater design coherence. The other major area of scrutiny is an examination of the extent to which the design propositions developed here are *able* to be applied to the process of curriculum development; in other words, to better understand the context within which the curriculum is being developed and the constraints that this context places on developing cognitively sound design.

Empirical testing of teacher sense-making processes

The findings in this work have been theoretically rather than empirically derived. That is to say, the implementation difficulties that have featured consistently with New Zealand social studies have been attributed to design failures on the basis of analysing the design through the lenses of schema and cognitive load theory, not on the basis of direct interaction with teachers. The sense-making principles derived from the empirical work of Spillane and from cognitive load researchers have been applied theoretically to the text of past curriculum designs and conclusions about the qualities of the design have been drawn. While there is no particular reason to suppose that Spillane's observations of American teachers' policy deliberations are substantially different from those of New Zealand teachers – in fact Fernandez and Ritchie's (2003) research draws some distinct parallels in their analysis of physics teachers curriculum understandings - the fact remains that the way that New Zealand teachers make sense of the social studies curriculum has not been tested in the field in the detailed manner that would give greater surety about the findings argued here. Likewise, while

cognitive load theory has strong empirical validation this validation has not been in the context of teacher sense-making from curriculum text.

Given that the next step in the Ministry of Education *Curriculum Project* is to consult teachers on the draft essence statements and curriculum structures it is strongly recommended that, rather than simply relying on the usual sources of feedback (self-report questionnaires and individual or focus group interviews), the sort of detailed observations of teacher interpretive work that Spillane, Hill and others have carried out be included alongside the consultation process. In other words, teachers should be asked not so much what they think of the curriculum (although there is clearly a place for such a response) but what they understand the curriculum is asking them to do and what they would do to implement it. From the point of view of testing the efficacy of particular sense-making strategies suggested in this thesis, especially those related to the reduction of cognitive load – glossing explanations alongside the main body of the text, aligned diagrams, connectives, achievement objectives that integrate multiple elements – it would be necessary to compare the responses of teachers to differing presentations of curriculum content.

Nuthall's (2004b) standards for research into the relationships between teaching and learning in the contexts of students and classrooms are pertinent here. He argues that research that draws conclusions about the *overall effectiveness* of teaching strategies is limiting because it fails to distinguish the *relative effects* of the component parts of the overall strategy. The design propositions advanced in this thesis are, in effect, the component parts of an overall cognitive approach to design. Any claims for their efficacy, therefore, need to be derived from "direct systematic continuous observation" (p. 296) of the effects of *individual* components of design on the sense-making of *individual* teachers. It is only through such detailed analysis, Nuthall argues, that it is possible to understand the ways in which particular actions "shape the learning process going on in the mind ..." (p. 301). Thus, the types of research questions that are likely to be most productive are such questions as:

- Do teachers make more sense of an essence statement that has explanations glossed beside it than one that has no explanation accompanying it or that that has an explanation included separately?
- At what point does the addition of explanations and rationale frustrate teachers and do these frustration levels vary by such teacher characteristics as experience and qualifications? (Davis & Krajcik, 2005)
- How do individual teachers respond to, and make sense of, the attempts to balance curriculum requirements alongside teacher discretion and autonomy? (Davis & Krajcik, 2005)
- Does a teacher's social studies 'biography', and their values and beliefs about the subject, influence the extent to which particular strategies assist sense-making?
- What is the relationship between the content of the reform and the need for sense-making support? In other words, does design assist or inhibit sense-making irrespective of content or is the sensitivity, or novelty, of content a mediator of sense-making?

Equally importantly, the research will need to take account of the role of situated cognition. The design propositions, as stated, emphasise the relationships between design and individual cognition. As Spillane's research has shown, however, teacher sense-making about policy is strongly influenced by the *context* within which the individual teacher is working. Therefore, research into the impacts of the design propositions on teacher sense-making will also need to consider whether the presence or absence of subject experts makes a difference to the sense-making of individual teachers, and whether particular school contexts – such as the general attitude towards social studies and towards change - influences the efficacy of the proposed design devices.

This thesis has also claimed that sources such as handbooks and published resources intervene in the curriculum sense-making process, especially where the cognitive

demands on sense-making are high. It has further claimed that misalignment of these sources to curriculum intent in effect introduces multiple and conflicting policy messages. While there has been ample evidence of intervening sources in New Zealand social studies, this thesis has only examined the issue of alignment with official curriculum at the level of official support materials and even then only to a limited extent. It has not carried out a detailed analysis of the alignment between official statements of curriculum and official support materials and nor has it investigated the extent to which teachers are influenced by these sources.

The need for such work is especially important in the context of the current Ministry of Education's intention to encourage greater teacher involvement in curriculum decision-making by promoting school-based curriculum development (SBCD) (Bolstad, 2004). The Ministry intends to help teachers work from the national curriculum to develop school-based curriculum by providing support in the form of "principles, processes and examples" (Ministry of Education, 2005). This is a relatively conservative form of SBCD given its origins in national curriculum rather than in the curriculum problems of teachers and their students but, as such, it places pressure on the "principles, processes and examples" to be aligned with curriculum intentions. Two avenues of research are likely to be productive here. One would extend the curriculum documentary analysis undertaken in this thesis to a detailed analysis of the match between the mandated curriculum and the support materials that accompany it. Ideally this research would *precede* the release of the support materials so that potential confusions and contradictions are minimised. The second line of inquiry would be to examine the ways that teachers use the supporting materials to make sense of the curriculum task. Such empirical work would not only test the claims made in this thesis about the role of multiple sources of policy but would also provide valuable insights into the impacts of professional development resources on teacher learning which would, in turn, inform future processes of curriculum and resource development.

The other intervening source of policy is the *ad hoc* curriculum developed by commercial publishers. In spite of the flexibility built into past expressions of the New Zealand social studies curriculum it has been argued here that this flexibility has often been compromised by the ready availability of resources that have done much of the curriculum thinking for the teacher. Given the likely continuing dependence of many New Zealand social studies teachers on such sources a much closer empirical analysis needs to be carried out of their alignment to the curriculum and of the ways that teachers use these resources to make sense of the curriculum.

The selection of citizenship as an organising framework

There is general agreement in the social studies literature in New Zealand and internationally that the subject needs to be organised around a clearer, more robust theoretical structure. While this thesis has argued that citizenship education should provide this focus, the on-going contention around understandings and misunderstandings of its meaning may well undermine the very direction sought in this thesis. Significantly, its acceptance as a term to Maori is also largely untested. The promise of *rangatiratanga* in Article 2 of the Treaty of Waitangi, for example, significantly challenges the unitary nature of citizenship implied in Articles 1 and 3. A more inclusive definition of citizenship may not necessarily resolve this issue. As Heater (2004) acknowledges, the concept is being asked to take on so much meaning that it “cannot take the strain of the semantic burden” (p. 293). As a result “it contains so many tensions and contradictions there [has been] little chance for educationists to construct comprehensive and coherent programmes of citizenship education” (p. 295). If he is right this does not augur well for the design recommended here given its focus on cognition. There is certainly substantial further work to be done on understanding teacher, and community, reactions to and interpretations of citizenship.

There is also scope for work on developing and testing alternative theoretical frameworks for social studies. Citizenship is by its nature an “integrating” theme. This thesis has not tested the alternative of organising the subject around the

individual disciplines. This is not likely to be any less contentious than citizenship given the likely sense of disenfranchisement it would engender in primary school teachers and the disagreements within the disciplines between traditional and radical approaches (Marsh, 2005). The enduring nature of the disciplines and the ever-strengthening call from teacher groups representing these disciplines for greater recognition in the curriculum suggest that such an organising framework is at least worthy of further research work. Given the diversity of views a Delphi study drawing on teachers and academics might well help surface shared themes.

There are other integrating themes that could also be explored in the search for a more robust framework for social studies. A recent Ministry of Education commissioned discussion paper on the title of the learning area (Sinnema, 2004) canvassed various options for naming and organising the learning area – social studies, social sciences and society – before settling on “Society” on the basis that this, more than any other title clearly communicated what the subject was about. In their submission on the first draft of the 1997 curriculum the Education Forum (1995) recommended and justified a theoretical framework “based on a clearly stated and defensible view of what is most important in human societies” (p. 51). They argued that the framework should be organised around three sets of “criteria of significance” – human control over nature; changes in modes of thought; and changes in freedom, equality, safety and security. There has also been much New Zealand interest in, and promotion of, the curriculum structure that supports the New Basics in Queensland on the basis of its “unified approach to knowledge” (Clark, 2004, p. 136). Each of these offers possibilities for organising structures for the subject that warrant further research into their theoretical rigour and their wider acceptance.

The context of curriculum development and design implications

It has been claimed throughout this thesis that design is an artefact of the process of curriculum development. It is simplistic to claim that the design propositions advanced here can be simply and unproblematically transferred to, and imposed on,

the current curriculum. In fact it can be argued that their emphasis on greater clarity of intention increases the difficulty of their acceptance by those who design curriculum because it directly challenges the eclectic response that has been commonly used to “resolve” contestation (Clark, 2004; Kelly, 1999). Design Proposition Four, for example, about the need for a clear and unambiguous purpose, while not necessarily contentious as a proposition about clarity becomes highly contentious when the purpose itself is defined.

What needs to be better understood here is what Walker (2003) calls the deliberative platform: the process by which “curriculum development groups ... adopt a set of shared beliefs that will guide their deliberations” (p. 237). Such beliefs need to take account of persistent problems, their causes and the range of possible resolutions. Assumptions should be identified and labeled as such. Such a process is critical to the development of coherent and thoughtful design because it helps to mitigate whim and convenience. There is a small literature in New Zealand social studies that documents the deliberations of curriculum committees – some from members of those committees themselves (for example, Lewis, 1980; Hunter and Keown, 2001), and some from the interviews with participants (for example, Mutch, 2004; Openshaw & Archer, 1989). The current phase of development is somewhat unique, however, in its consultation scope. This uniqueness poses significant challenges to the development of a shared platform of beliefs and to a subsequently coherent curriculum.

Throughout the current process of curriculum development the Ministry of Education, in response to criticism that previous curriculum developments marginalised teachers and privileged particular power groups, has embarked upon what they call a “co-construction” process. In the case of the social studies, this process has been characterised by more than 18 months of consultation through on-line forum hosted by curriculum writers, teachers and academics; through interest group meetings – sometimes of more than 50 people; and through “reference groups” and “writing teams”. Various informal consultations have also been undertaken by the Ministry and

by members of the reference groups and writing teams. The composition of both the reference and writing groups has changed over the 18 months in an attempt to include new voices, and through attrition and dissatisfaction. While inclusion has been a strong and consistent feature of consultation, the ephemeral nature of the membership of the writing and reference groups poses potential risks for design because it complicates the deliberative platform. Shared beliefs from one meeting become contested beliefs at the next. While shifts are inevitable, and necessary, the extent of these shifts, as evidenced by two very different essence statements produced three months apart (December, 2004 - February, 2005) by two different writing teams, indicates that after 18 months of work considerable contention remains about the purpose, content and structure of social studies.

The greater inclusiveness of the current consultation also poses a design challenge. Inevitably, and deliberately, the wider net of consultation has strengthened the voice of teachers in the process. As Marsh (1984) observed, however, teachers are inclined to focus more on the “means” rather than the “ends.” There are two possible consequences of such a focus that suggest future lines of research. First, it may be that teachers’ preoccupation with the practical leads them to focus even more than past designs on specific rather than the general (Eisner, 2000). Thus the misalignment between general statements of curriculum intent and specific learning objectives may become even more pronounced. Second, important deliberative questions about the nature of knowledge and the purposes of the subject may be compromised in processes that focus primarily on the best ways to organise the subject. The design propositions advanced in this thesis suggest that the absence of such deliberation risks compromising clarity of purpose and theoretical coherence.

This thesis in arguing for a more coherent design cannot be blind to these complexities and uncertainties. What is needed is a better understanding of how particular design decisions and compromises get made in such an ostensibly consultative process of curriculum development, and how the design propositions advocated here are

promoted or overlooked by the dominant voices in the process. Design aspirations are one thing; infiltrating these aspirations into the development process and finding creative ways of resolving values conflicts they might pose is quite another (de Bono, 2005). With at least a further 12 months of consultation to go and with detailed on-line records and meeting minutes available it is an area of fruitful future research.

Concluding Comments

This thesis has aimed to make two substantive contributions to the curriculum field. The first has been to contribute a perspective on current curriculum theorizing that is sourced in aspects of cognitive theory – in particular schema theory and the theory of cognitive load. Although it is unlikely that Pinar and his colleagues (1995) were thinking of such an addition given their focus on deconstruction, the contribution of this perspective is consistent with their claim that the curriculum field remains open to ideas from other fields. They concluded their major text on curriculum understanding with the following comments:

Perhaps the most exciting areas may be ones we have not identified in this book. They may be areas – hybrid ones – that will evolve out of existing sectors, across discourses, identifying areas of focus and specialisation of which we cannot conceive at this time ... the conversation in the field shifted rather dramatically just twenty years ago, and it might shift again, in a direction we cannot foresee at this time. (p. 868)

While the cognitive shift developed in this thesis might be seen by some as purely technical, or, by the postmodernists as an impossible search for clarity and agreement (Pinar, 2003), it is argued here that such a contribution offers much more than a technical addition to curriculum theorizing. It develops theoretical perspectives on the way in which national curriculum policy, as a statement of entitlement for all students, might be better communicated. It, therefore, positions curriculum design in the field of teacher learning and argues that curriculum policy itself needs to be seen as an educative resource (Davis & Krajcik, 2005) that supports teacher instructional decision-

making in the myriad unique and novel situations that teachers face. By applying theoretical and research evidence about aspects of human cognition to an analysis of historical patterns of design it develops a set of propositions about the ways that design affects teacher learning. These propositions need to be tested empirically in future work. The cognitive perspective does not imply any particular position on the purpose or content of the curriculum other than its internal coherence. Nor does it imply any particular sense of prescription. The fact that the second half of this thesis has argued for greater prescription within social studies is a function of the context of the subject in New Zealand, not of the cognitive theorising *per se*.

It is acknowledged that the cognitive perspective developed here is only partial. While internally incoherent and unnecessarily complex design can certainly inhibit learning, design alone cannot educate teachers. It is “only one perturbation to the *status quo*” (Davis & Krajcik, 2005, p. 8). The role of situated cognition, therefore, needs much closer examination within the real contexts in which teachers make curriculum decisions. A cognitive approach to curriculum theorising is also naïve if it ignores the social, cultural and political influences that impose significant constraints on the communication of clear and agreed curriculum policy. The cognitive perspective does, however, offer a set of insights into the principled design of curriculum policy. Such insights, if validated by further empirical testing in the full context of teacher curriculum decision-making, are likely to inform increased teacher agency by reducing the demands on sense-making thereby increasing the capacity for teachers to adapt requirements to local circumstances in a manner congruent with the State’s intended curriculum entitlement.

The second contribution is to the position of social studies itself. In spite of its status as a compulsory subject in the New Zealand curriculum for more than fifty years social studies is not yet widely valued by the community, by students, and even by some social studies teachers themselves. Although curriculum is only one vehicle for promoting a subject’s status it is an important one because it sets out the scope of what

is to be learned and the approach by which that learning is to be encouraged. In doing so it makes claims about what is of value in a particular subject and more indirectly stakes a claim for that subject in the context of competing claims from many other subjects. Given the constraint of limited time available for learning in schools what is critical for social studies is that it successfully argues for its *relative value*. This means it has to be clear about its contribution to the education of all young people and it has to communicate this clearly and convincingly. For too long, New Zealand social studies has failed to agree on a clear aim and, as a consequence, it has failed to develop a sound, theoretically informed curriculum structure. In fact, the design has become increasingly eclectic as it has sought to acknowledge all past traditions of social studies while avoiding advocating for any one as predominant. Much of the work, therefore, of creating value for social studies has been left to teachers. In this endeavour, teachers have been hindered not only by the lack of a clear subject purpose but also by increasingly complex, and sometimes contradictory design. This thesis has argued that the way forward for New Zealand social studies is to abandon the atheoretical approach to curriculum design and to build the subject around a well-reasoned, unequivocally-expressed focus such as citizenship education with all curriculum elements transparently aligned to this focus and with examples at the level of implementation detail integrating each of these elements. Only through such a design will both curriculum rhetoric and teacher practice demonstrate the relative value of the subject as a core requirement within the New Zealand national curriculum.

APPENDICES

Appendix A: New Zealand Curriculum Framework Development Sequence

English and Maori curriculum statements were developed in each of seven essential learning areas.

- Mathematics (publication 1992, implementation 1994), Pangarau (1996, 1997).
- Science (1993, 1995), Putaiao (1996, 1997).
- Language and Languages - English (1994, 1996), Te Reo Maori (1996, 1997).
- Technology (1995, 1999), Hangarau (1999, 2001).
- Social Studies (1997, 2000), Tikanga-a-Iwi (2000, 2002).
- Health and Physical Education (1999, 2001), Hauora (2001, 2004).
- The Arts (2000, 2003), Nga Toi (2000, 2003).

As part of the Language and Languages learning area statements were also developed in Chinese (1995), Spanish (1995), Samoan (1996), Japanese (1998), French (2002), German (2002) and Cook Island Maori (2004)

Appendix B: An Overview of the Purposes of Social Studies as Described in New Zealand Social Studies Curriculum Documents

| Classification of Purposes | | 1944 | 1961 | 1977 | 1997 |
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| Social studies as knowledge and understanding | About Society | An integrated course organised around the central theme of the life of man in society. | | | <p>Social studies focuses on the study of society and of human activity in the contexts of continuity, change and contemporary issues.</p> <p>Social studies enables students to develop their knowledge and understandings of the diverse and dynamic nature of society and of how interactions occur among cultures, societies and environments.</p> <p>Students will develop knowledge and understandings about human society.</p> <p>Students will ... learn about society.</p> |
| | About Human Behaviour | | | <p>Social studies should make students and teachers look at and think about human behaviour realistically, objectively and with sensitivity.</p> <p>Social studies can help students develop ideas about human behaviour.</p> | <p>Students will be challenged to think clearly and critically about human behaviour</p> |
| | About How People Live | In any study of people the essential thing for the pupil to understand is their way of life – their social habits, their occupations and leisure time pursuits, their religion, their art and literature, their political outlook and form of government, their type of social and economic organisation. | Social studies is a study of people: of what they are like – their beliefs, their aspirations, their pleasures, the problems they have to face: of how and where they live, the work they do, and the ways in which they organise themselves. | Social studies is about people: how they think, feel and act, how they interact with others, and how they meet their needs and organise their ways of life. | <p>Ui mai koe ki ahau he aha to mea nui o tea o, maku e ki au he tangata, he tangata, he tangata (ask me what is the greatest thing in the world and I will reply, it is people, it is people, it is people)</p> |

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| | | In dealing with a particular people ... to show who and what they are, how they have developed historically, and how the kind of land they live on has conditioned their activities. | Help children take an intelligent and sympathetic interest in the various peoples, communities, and cultures of the world. | A better understanding of others. | Students will understand people's organisation in groups; and the rights, roles, and responsibilities of people as they interact within groups (followed by more specific detail of general outcomes under these general aims). |
| | | | They should understand a little more about the peoples of other countries and their ways of living, to enter sympathetically into their feelings, to appreciate their ideas and problems, and to be aware of the contribution of each country to the welfare of all countries. | | |
| | | | Through the study and exchange of ideas children will come to look for new patterns of meaning, new relationships of cause and effect in the lives of the people they study. | | Students will understand the contribution of culture and heritage to identity; and the nature and consequences of cultural interaction (followed by more specific detail of general outcomes under these general aims). |
| | | | There is only one theme – "how do people live and what do they aspire to?" | | Students will understand people's interaction with places and the environment; and the ways in which people represent and interpret place and environment (followed by more specific detail of general outcomes under these general aims). |
| | | | | | Students will understand relationships between people and events through time; and interpretations of these relationships (followed by more specific detail of general outcomes under these general aims). |

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| | | | | | Students will understand people's allocation and management of resources; and people's participation in economic activities (followed by more specific detail of general outcomes under these general aims). |
| | About New Zealand and New Zealand society | | Students will appreciate their national heritage, understand the drive, the energy, and the achievements of their own forefathers ... they will strive to be equally independent, energetic, and adventurous in their own lives. | To develop those ideas and skills that will contribute to their understanding of their society. | An emphasis is placed on learning about New Zealand society. |
| | | | | | <p>Social studies programmes emphasise learning about New Zealand peoples, cultures, and groups in various time and place settings ... include[ing] development of understandings of the Treaty of Waitangi, of New Zealand's bicultural heritage, and of the multicultural nature of our society.</p> <p>All students [will] gain knowledge and understandings about events, places, and people of significance to New Zealand, in the past and present.</p> <p>Students will understand their own society and environment...</p> |
| | | | | | <p>All students will investigate and come to understand particular aspects of New Zealand society (later listed as 19 bullet points in a separate section).</p> <p>Students will ... develop their knowledge and understandings about New Zealand society.</p> <p>Students will understand the nature</p> |

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| | | | | | of biculturalism and the partnership between Maori and Pakeha. Students will explore the bicultural heritage of New Zealand society. |
| | About the Wider World | A gradual widening of horizons | To enlarge children's experience, to deepen their understanding of it, and to extend this understanding into the world beyond their immediate experience. | | Social studies helps students to understand their world |
| | | Deepen pupils' understanding of human affairs | The aim of social studies is to help children understand the world they live in and to take their place in it. | | An emphasis is placed on learning about the countries and regions that have significance for New Zealand. |
| | | | Through the study and exchange of ideas children will illuminate the world they live in in a way their own limited experience could never do. | | Students will develop understandings of the societies, cultures and environments of Tagata Pasifika; ...Australia; ...British and other European societies; [and] ...South and East Asia. |
| | | | A many-sided attack on the great educational project of understanding the world and of learning how to carry on a good life in it. | | Students will develop understandings of international organisations and global issues that affect New Zealand, of the roles and responsibilities that New Zealanders have within such organisations as the United Nations and the Commonwealth, and of the ways that New Zealand continues to be involved in international issues. |
| Social studies as citizenship education | Through knowledge of contribution, duties and responsibilities | Arouse and quicken in pupils a livelier interest in the meaning and responsibilities of citizenship. | They should begin to develop towards their own country feelings of loyalty which will make them neither blind to its faults nor boastful of its merits, but eager to play their part as responsible citizens. | A better understanding of their involvement in society. | Students will develop a sense of belonging to their community and their nation. |

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| | | Develop a lively sense of responsibility towards civilised values. | | | |
| | Through development of participatory abilities. | Aim – assist in the development of individuals who are able to take their part as effective citizens of a democracy (Note – the word “citizen” is then defined to include levels from family to state). | To develop the sympathies and sensitivities, habits of thought, skills of study, and standards of behaviour that are necessary for intelligent, competent, and responsible people in our New Zealand society. | Social studies should help make students and teachers make decisions about participation in a changing society. | Social studies is important to the whole community. It emphasises the skills and processes involved in social participation ... and help[s] students to become informed, confident and effective citizens. |
| | | Acts intelligently in the common interest | They need to see their own society more clearly and to appreciate its values more justly. | Involvement in developing ideas about human behaviour may enhance students’ participation in the affairs of the community. | The understandings and skills they develop enable (students) to participate in society as informed, confident, and responsible citizens. |
| | | | | Social studies can lead students to realise that they can contribute to the life of the community. | Social studies education aims to enable students to participate in a changing society as informed, confident, and responsible citizens. |
| | | | | To apply their knowledge and skills to the welfare of mankind. | Students will develop the skills ... to enable them to participate responsibly in society. |
| | | | | | Students will be able to investigate and explore important social issues, make decisions, work cooperatively... |
| | | | | | Social studies gives students the skills and knowledge to play their part in society |
| | Through actual participation | Pupils should actually perform services for their community. | | Students should demonstrate a willingness to be involved in their community. | |
| Through developing commitment to social justice | | | Social studies aims to commit students and teachers to respect human dignity, to show respect for others, to respect and accept the idea of difference and to uphold social justice. | Students are challenged to think about the nature of social justice, the welfare of others, acceptance of cultural diversity, and respect for the environment. | |

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| Social studies as the development of lifeskills. | Through developing self-awareness and personal values. | To provide scope for, and itself help to create, individual interests of many kinds. | Children should begin to develop their own ideals of behaviour, to see themselves as people striving to be tolerant, kindly, honest, courageous, just, generous and independent. | A better understanding of themselves. | |
| | | | They should become accustomed to accepting responsibility for failure as well as success. | Social studies can help students form and clarify values | |
| | | | Students should seek to identify and examine, as rationally as possible, what is important to people in their lives. | | |
| | | | Involvement in developing ideas about human behaviour may enhance students' sense of personal identity. | | |
| | | | To develop those ideas and skills that will contribute to their understanding of themselves. | | |
| | | | To think clearly and critically about human behaviour and values so that they may make reasoned choices. | | |
| | | | The syllabus is designed to help students identify their own values, to recognise how values affect the way they think and act and the influences that have shaped their values, to examine the consequences of their values in terms of their consequences, and to attempt to resolve values conflicts by applying rational procedures. | | |
| | | | Students should develop independence in their studies and their judgments. | | |
| | | | Students should develop the attributes of objectivity and open-mindedness. | | |

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| | Through developing the ability to interact and communicate with others. | | Act responsibly and intelligently in social situations. | Students should gain experience in working out personal relationships. | Students develop and apply skills as they ... work cooperatively with others. |
| | | | They should learn to state their own opinions modestly, and to listen with respect to the views of others. | The syllabus is designed to help students show by their actions that they are sensitive to the needs and interests of others and that they accept and respect the idea of cultural difference. | |
| Social studies as the development of reflective and analytical skills | Inquiry and investigation | Open up wide fields for personal exploration | Must gain much factual knowledge; and learn to consider critically and to evaluate many ideas and generalisations. | Social studies can help students form and clarify ideas | The inquiry process involves students in collecting and analysing information about people, groups, communities and societies. |
| | | The course should give ample scope for the development of skill in expression – oral, written and pictorial (e.g. diagrams and picture statistics) and in such processes as the collecting and handling of facts, the weighing of evidence and argument, and the working up of material into a logical pattern, and in the technique of reaching decisions through group discussion. | | The syllabus is designed to help students identify and formulate an appropriate inquiry, to locate and gather relevant information, to interpret information, to make inferences from information, to make tentative generalisations, and to form and express new ideas. | Students collect information and process it in relation to the inquiry focus. From the processed information, they make generalisations, draw conclusions, and communicate them. |
| | | They should have experience of first-hand inquiry into their own community. | | Students should learn how to ask significant questions. | Inquiry is focused through the use of questions or hypotheses. |
| | | | | | Students develop and apply skills as they investigate society [and] explore issues. Students reflect upon the process and their findings and evaluate them. |

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| | Values analysis | | To discuss and understand many points of view – both those that may be held by their fellow countrymen and the sometimes diverse views held by peoples of other countries. | The syllabus is designed to help students identify value positions, identify values in their own and other societies, examine values in terms of their consequences, recognise that values change and why, accept that people strive to maintain their values and that value conflicts exist. | Students will explore different values and viewpoints. |
| | | | | Social studies can help students form and clarify values | The Values Exploration process involves students in examining and clarifying their own values and those of others in relation to issues in society (followed by more specific detail of general outcomes related to this). |
| | | | | Students should seek to identify and examine, as rationally as possible, what is important to people in their lives. | Students will also examine the collective values upon which social structures and systems are based. |
| | | | | | To recognise that people’s values are formed by many influences and that they may change over time. |
| | Social problem-solving | Make firm social judgments | Help children think clearly about social problems. | Students should learn how to deal with life’s varied and sometimes controversial situations. | The Social Decision Making process involves students in applying their knowledge and developing their skills as they make decision about actions that could be taken on a range of issues and problems in society (followed by more specific detail of general outcomes under these general aims). |
| | | | | Students should learn how to involve themselves in problem-solving. | Students develop and apply skills as they ... make decisions. |

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| Social studies as an integrating social science | | A new direction in the teaching of history and geography | | | Social studies is the systematic study of an integrated body of content drawn from the social sciences and the humanities. |
| | | We recommend that history, geography, and civics, as well as certain new material derived from the first hand study of community life and from social studies other than those just mentioned, be regarded as one subject and learned as such. | | | |

Appendix C: Citizenship Education Requirements in three national curricula

(see p. 191 for explanation of codes)

| National Curriculum for England Key Stage 4 | National Standards for Civics and government – USA | Discovering Democracy – lower and middle secondary (Australia) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Knowledge and understanding | The nature of civic life, politics and government? | Who rules? |
| Legal and human rights and responsibilities in society and how they relate to citizens, including the role and operation of the criminal and civil justice systems. (HR/LAW) | Reasons why politics and government are necessary and integral elements of society (GOVT) | Types of governance: monarchy, aristocracy, tyranny, democracy (GOVT) |
| Origins and implications of diverse national, regional, religious and ethnic identities in the UK and the need for mutual respect and understanding. (IDEN) | Purposes of government and the implications of different purposes (GOVT) | Features of Australia’s system of representative democracy (contrasted with Ancient Athens and Sparta) (GOVT) |
| The work of parliament, government and the courts in making and shaping laws. (LAW) | Nature and purpose of constitutions (GOVT/LAW) | Political parties in Australia: origins, purposes, objectives, ideologies, constituencies, operations (GOVT) |
| Playing an active part in democratic and electoral processes. (dPART) | The nature of the rule of law and how civil society can maintain constitutional government (LAW) | Impact of the party system on parliament, pre-federation to contemporary Australia (GOVT) |
| How the economy functions, including the role of business and the financial services.(HR) | The relationship of constitutional government to political and economic freedom (GOVT) | Features of a healthy democracy (GOVT) |
| Opportunities for individuals and voluntary groups to bring about social change locally, nationally, in Europe and internationally. (dPART) | The conditions required for constitutional government to flourish (GOVT) | Threats to democracy as exemplified by democracy lost in Germany in 1933 (GOVT) |
| The importance of a free press, and the media’s role in society, including the internet, in providing information and affecting opinion. (dPART) | The alternative ways that societies organise constitutional governments (GOVT) | Safeguards to democracy in contemporary Australia (GOVT) |
| The rights and responsibilities of consumers, employers and employees (HR) | Foundations of the American Political System | Law and Rights |
| The United Kingdom’s relations in Europe, including the European Union, and relations with the Commonwealth and United Nations (INT) | The intellectual and political background to American constitutionalism from Magna Carta onwards, including the development of popular sovereignty and the idea of constitutions as “higher law” (GOVT/LAW) | Origins and development of Australian law (LAW) |
| The wider issues and challenges of global interdependence and responsibility, including sustainable development and Local Agenda 21 (INT) | How the constitution has shaped the character of American society and the distinctive characteristics of that society (IDEN) | Types of law: common, statute, customary, criminal and civil (LAW) |

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| Skills of inquiry and communication |
| Research a topical political, spiritual, moral, social or cultural issue or event by analysing information from different sources, including ICT-based sources, showing an awareness of the use and abuse of statistics (iPART) |
| Express, justify and defend orally and in writing a personal opinion about such issues, problems or events (iPART) |
| Contribute to group and exploratory class discussions, and take part in formal debates (iPART) |
| Skills of participation and responsible action |
| Use imagination to consider other people's experiences and be able to think about, express, explain and critically evaluate views that are not their own (iPART) |
| Negotiate, decide and take part responsibly in school and community-based activities (iPART) |
| Reflect on the process of participating. (iPART) |

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| Character of American political culture, unique features of national identity and political life (IDEN) |
| Understand civic values, the conflicts that arise among these values and the disparities between ideals and their realisation (IDEN) |
| How the government established by the Constitution embodies the purposes, values and principles of American democracy. |
| The function of law and opportunities for individuals to influence the making and executing of law (LAW) |
| Public opinion and the influence of the mass media on public opinion (dPART) |
| Interest groups, political parties, campaigns and elections (GOVT/dPART) |
| Relationship of the United States to other nations and to world affairs |
| The division of the world into nation states, how these states interact and the roles of major governmental and non-governmental international organisations (INT) |
| The history of America's relations with the world and how domestic politics and constitutional principles affect this role (INT) |
| How American foreign policy is made, the purposes of this policy and the reciprocal influence between the US and other nations (INT) |
| Roles of the citizen in American democracy |
| The nature of personal, political and economic rights and the responsibilities these rights entail (HR) |
| The difference between social and political participation, avenues available for participation and the distinctions between different avenues (dPART) |
| Understand how democracy depends upon attentive, knowledgeable and competent citizens who care about |

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| The Australian constitution and the role of the High Court (LAW) |
| Elements of a fair trial (LAW) |
| The nature of human rights (HR) |
| The historical development of the concept of human rights with reference to the Declaration of Independence (USA), the Declaration of the Rights of Man and Citizen (France), the Bill of Rights (USA), UN Declaration of Human Rights, the Australian constitution and civil rights organisations (HR) |
| The protection of human rights in Australia (HR) |
| Human rights of Australia's indigenous people over time (HR) |
| The Australian Nation |
| Key elements of democracy (GOVT) |
| Struggles to establish democracy in Britain and Australia (GOVT) |
| Establishment of franchise for Australian women and indigenous people (GOVT/HR) |
| Processes of federation – America and Australia (GOVT) |
| Constitutions as a basis for national government (GOVT) |
| The dissolution of federations (GOVT) |
| The republic debate in Australia (GOVT/dPART) |

their fellow citizens and their country (dPART)

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| The meaning and relevance of images of Australia (IDEN) |
| The demography of Australia: immigration policies and practices (IDEN) |
| Economic policies: work and the marketplace (IPART) |
| Social policies: historical and contemporary debates about welfare (HR) |
| Citizens and Public Life |
| The nature of political activity (dPART) |
| Parliamentary and activist lives (dPART) |
| Processes of influencing the views and actions of others (OPIN) |
| The evolution of community political debate (dPART) |
| Party political policies and practices (GOVT/dPART) |
| The role of the media (dPART) |
| Resolution of disputes between state and federal governments (GOVT) |

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