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**Manuscript for: Assessment in Education: Principles, Policy & Practice**

# The impact of standards-based assessment on knowledge for history education in New Zealand

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**Biographical Note:**

Barbara Ormond is a Senior Lecturer in the Faculty of Education and Social Work, at The University of Auckland. She researches within the fields of curriculum development and implementation, and assessment. Barbara's research relates to epistemological theories within the field of social realism and her current research focusses upon teachers' selections and framing of knowledge for secondary history. Barbara has also published on pedagogies for interpreting visual evidence using an interdisciplinary approach which draws upon both art historical and historical methodologies. Barbara lectures in secondary teacher education in the disciplines of history, art history, classical studies and social studies.

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# The impact of standards-based assessment on knowledge for history education in New Zealand

**Abstract**

This paper examines how a standards-based form of assessment in operation in New Zealand has impacted upon the knowledge taught to secondary history students. The segmentation of history into assessable components along with assessment mechanisms which encourage the reduction in the number of standards being attempted, has impacted upon both the breadth and range of historical content in history programmes. The reduction in knowledge is problematic as it diminishes learners' opportunities to draw connections between inter-related historical concepts from a wider knowledge base. Social realists have raised concerns about the reduced focus on knowledge in education and its effects in restricting students' development of conceptual knowledge which enables higher order, more abstract thinking. Experiences of standards-based assessment for history in New Zealand are indicative of this reductive phenomenon. In a culture of accountability standards-based assessment, as enacted in New Zealand, may impede delivery of critical knowledge.

**Key words:** standards-based, achievement standards, accountability, history, social realism

## Introduction

In New Zealand, an exacting form of standards-based assessment has created the circumstances in which knowledge for history in secondary schools has become fragmented and narrowed. While teachers have the autonomy to select any historical content which they believe will best serve their students' learning, the precision in assessing against tightly worded standards has reduced freedom and flexibility and encouraged teachers to reduce the breadth of knowledge taught to their students. New Zealand's educational practices mirror recent global trends in framing curricula requirements in *The New Zealand Curriculum* (2007) as outcomes-based goals which operate in tandem with extensive measuring and monitoring of student achievement against defined standards. Yet the two arms of educational policy, curriculum and assessment, have different purposes. While 21st century curricula are commonly focussed upon developing students' learning capacities underpinned by a philosophy that students learn best when curriculum decisions are tailored to their perceived needs and recognise what students want to learn, these objectives are not easily reconciled in a culture of accountability for grades. Through research into teachers' explanations for their selections of knowledge and analysis of the empirical data arising from national surveys on teachers' views on the standards used to assess history, this paper aims to illustrate the impact that standards-based assessment can have on programme design and cohesion of knowledge. The findings support the theoretical concerns raised by social realist scholars (e.g. Moore 2013, Young and Muller 2013, Wheelahan 2010, Rata 2012) that acquisition and understandings of propositional knowledge no longer has a certain place in educational thinking and practice. This paper contributes to the increasing body of social realist literature on questions of knowledge. However while much of the focus has so far been on the place of knowledge in curricula, this paper aims to show that standards-based assessment, under certain conditions, can also play a part in marginalising knowledge.

**The New Zealand Context**

New Zealand, in common with many other nations, operates an outcomes form of education for both *curriculum* and *assessment*. While the terms used to express these outcomes vary across nations, at their core are statements which define learning expectations. In *The New Zealand Curriculum 2007,* the term *achievement objectives* is used to describe the skills, concepts or content to be addressed in each learning area. The *Curriculum* is a slim, single document applicable to all state primary and secondary schools. It was designed to be flexible to enable teachers to develop programmes perceived to be relevant and appropriate for the learners in their school communities. For History, the *achievement objectives* require a number of concepts to be addressed (e.g. causes, consequences, perspectives, historical significance) rather than specifying particular historical topics. Operating alongside the *Curriculum* is a standards-based assessment system with *achievement standards* for assessing senior secondary students (aged 16-18) for the National Certificate of Educational Achievement (NCEA). The *achievement standards,* which had first been introduced in 2002, were revised between 2008 and 2010 to closely align with the curriculum *achievement objectives (*refer to Ormond 2012, for an explanation of the alignment project). While this discussion therefore, has its focus upon the enactment of standards-based assessment, implied within that is the curriculum *achievement objectives* because of their symbiotic relationship.

Looney, in a report for the OECD (2011), states that

> the core logic of standards-based systems rests upon alignment of three key elements: standards defining knowledge and skills …, curricula … and student assessments and school evaluations which measure attainment of standards (p. 3).

The systematic approach to alignment undertaken to create coherence between the three elements therefore suggests that the New Zealand education system operates in accordance with what is considered to be best practice in standards-based assessment.

[Insert Tables 1, 2 and 3 here]

The potential for knowledge to be marginalised has its foundations in a minimalist approach to specifying the learning outcomes. There are two *achievement objectives* for each of the senior levels of history in the *Curriculum,* comprising a total of only 108 words for the three levels of history (refer to Table 1). Using Level 1 of the *Curriculum* as an example, the first achievement objective focusses upon *causes and consequences* and the second requires students to understand how people's *perspectives* differ. During the alignment process, each of these was translated into an *achievement standard* at Level 1 of the NCEA. Achievement standard AS91005 (refer to Table 2) directly assesses understanding of *causes and consequences* of an historic event while standard, AS91004, assesses understanding of *perspectives.* The limitations of the *Curriculum achievement objectives* were addressed through additional standards to assess disciplinary processes and concepts such as interpreting historical sources, skills of inquiry and communication, and understanding the effects of significant events on New Zealand society (refer to Table 3). Due to the broadly stated *Curriculum* where there were no prescribed topics and themes for history, teachers gained responsibility for determining the historical content of their programmes from the time of this alignment in 2011. The new *achievement standards* were implemented for each senior level progressively between 2011 and 2013 and they comprise both internally assessed standards, where the assessment tasks are designed and marked by the teacher, and externally assessed standards for which students sit a three-hour nation-wide examination at the end of the year. The examinations are marked by national assessment panels and each panel marks one achievement standard.

While the six achievement standards provide scope for designing programmes which have breadth, depth and range, teachers and students can be selective of the standards they address There is no requirement or expectation that students be assessed against all of the standards and schools and teachers are encouraged to reduce the number of standards to reduce the workload for students. Each standard has a separate exam paper or assessment, with enrolments recorded separately for each standard. The number of standards attempted may be determined by the teacher or by the student. For example, during the three-hour, examination students may sit all three externally assessed standards for history, but most will be sitting two of the standards and some will be sitting one standard. Through doing fewer standards more time can be given to completing them. This may then yield higher grades. The achievement standards evaluate students against criteria with three grades of achievement - Achievement, Achievement with Merit, and Achievement with Excellence (refer to Table 4) and each standard accrues credits, with between 4 and 6 credits per standard for history. At each level, students need a total of 80 credits across all their subjects to gain a NCEA certificate. The NCEA forms part of a *National Qualifications Framework* which encompasses both senior secondary and tertiary qualifications.

[Insert Table 4 here]

**Conceptual Framework**

To understand the impact of standards-based assessment on history education in New Zealand three key fields of educational discourse are examined. First social realist theories within the field of the sociology of knowledge are examined to explain the epistemological features necessary for delivering critical knowledge. Secondly, consideration is given to the principles

underpinning standards-based assessment and its potential to adequately assess the breadth and inter-relatedness of important propositional knowledge. Thirdly the interface between assessment and accountability are explored to examine how high accountability models can impact on the knowledge students are taught.

**Social Realism and the place of knowledge**

In response to trends internationally in curricula where skills for 'learning to learn' and broad vision statements have taken precedence over specifying particular propositional knowledge, social realist literature has raised concerns about the side-lining of this form of knowledge. Propositional knowledge, refers to content and concepts, in contrast to generic skills or processes. For history propositional knowledge includes the content of knowing about people, places and events in the past and concepts such as nationalism and communism. In refocussing attention on the importance of knowledge in contemporary education debates, Young (2009) asks 'What are schools for?' and argues that the question of the place of knowledge in schooling has 'been neglected by both policy makers and educational researchers' (p.11). The issue is gaining attention of scholars in different disciplines with studies undertaken into, for example, geography (Lambert, 2011), physics (Yates & Millar, 2016) and music (McPhail, 2017).

A social realist view of knowledge recognises that knowledge has been developed and exists within its social context. It is knowledge which is real and reliable, although not infallible, because it is produced and critiqued within communities of practice, such as academic communities. Developing from social realist theory is the concept of powerful knowledge (Young and Muller, 2013) which, social realists argue, all students should be given access to. Powerful knowledge has 'generalising capacities' (Young, 2013, p. 108) which enables the learner to make interconnections to create a framework into which new knowledge may be

understood (Ormond, 2014). Powerful knowledge emerges when contexts and concepts are explored in sufficient depth and breadth for students to be able to engage with their central principles.

**Standards-based assessment**

While a curriculum is foundational in determining the knowledge taught to students, the ways that students are assessed on their knowledge also plays a role in both validating particular knowledge and in the ways knowledge is selected, framed and taught. With standards-based assessment the standards comprise statements which define the knowledge students are expected to understand. This can include propositional knowledge or skills and competencies which students are expected to demonstrate that they can do. Standards therefore have the potential to clarify what is important to learn (Wiggins & McTighe, 2005). The effectiveness and value of the assessment against standards is highly dependent on the particular nature of the standards, the mechanisms by which they are implemented, and the accountability framework in which they operate.

The process of determining *standards,* which Sadler (2014) calls *codification*, involves identifying and separating out the critical components of a subject and condensing down a body of propositional knowledge, disciplinary concepts or skills into manageable and measurable 'bites'. A study of literature on standards-based assessment by Rawlins et al. in 2005, in which 88 publications were analysed, concluded that standards-based assessment was perceived to have the benefits of improved student understanding of what is being assessed, greater accuracy in teacher judgements, improved generic skills, and the replacement of 'quota' or norm-referenced systems (Rawlins et al., p.108). The difficulties of standards-based systems, on the

other hand, were identified as ‘atomisation’ of learning and the reductionist effect of standards on narrowing of curriculum, over-assessment, and the focus on assessment rather than on learning (p.108). Knowledge, therefore, has the potential to be marginalised through the implementation of standards-based systems as it is only seen to be valid where it is directly applicable to achieving a standard. ‘The knowledge that counts is the knowledge that is visible in performance’ (Allais, 2014, p.144). In making curriculum and teaching decisions, teachers therefore, ‘design down’ (Allais, 2006, p. 25) from the standards. Where these standards are broad concepts or skills, as is the case for history education in New Zealand, Allais (2014) points out that, propositional ‘knowledge cannot, in this approach, be the starting point’ (p. 25).

While the division of a subject into discrete standards has beneficial effects in clarifying what is important to learn, it can also disrupt the disciplinary coherence of a subject and reduce comprehensibility for students. Sadler (2007) argues that ‘The further this decomposition progresses, the harder it is to make the bits work together as a coherent learning experience which prepares learners to operate in intelligent and flexible ways’ (p. 389-90). Moreover, Fountain (2008) comments that learning is assumed to be ‘a linear process that functions like a machine, and that every piece can be taken apart, analysed, and then put back together’ (p. 136) but he poses the question -

> Can the subject of history (or any other knowledge-based discipline) actually be disassembled and reassembled in this way? History is a subject where a student’s progress depends on the depth and breadth of their understanding about the past rather than isolated measurable, and transferrable skills (p.136).

The reductive effects of utilising just enough knowledge to address the standards is often further compounded by the common practice that students are usually assessed against a standard just once so that the 'pea-sized bits (are) to be swallowed one at a time – and for each bit, once only' (Sadler, 2007, p. 390). Whether a single experience of a concept or skill learned once for the purposes of achieving a standard is sufficient to enable that learning to be transferrable, is doubtful. While there may be an expectation that teachers revisit concepts or skills repeatedly to ensure the learning process is robust, the purpose of gaining the standard or a qualification is likely to be foremost in both teachers' and students' minds so that achievement of an outcome be ticked off and learning moves quickly on to the next bite-sized segment. Furthermore, Torrance (1995) comments that 'empirical evidence … suggests that minimum standards or minimum competency often become a *de facto* maximum as teachers strive to make sure all students reach the minimum (p. 149).

***Transparency***

A key goal of standards-based assessment is that it is *transparent* which refers to the clarity with which the standard is described. It should be able to be read and interpreted with a high degree of consistency by all users, and enable the learner to know in advance, and work towards, what he or she needs to demonstrate to reach the standard (Looney, 2011, p. 12). The degree of transparency can have implications for knowledge. Where teachers are very clear about the level of achievement required to meet a standard, knowledge may be tailored to the precise requirements of a standard. Where there is uncertainty in interpreting the standard, teachers may over-deliver on knowledge in an attempt to cover all bases, or favour detail over breadth.

Sadler (2014) argues that the qualities referred to in standards are not 'directly observable or measurable'. They are drawn from 'inferences based on evidence' in student responses. 'Codifications therefore cannot 'hold' standards by serving as stable reference points for judging and reporting on different levels of student achievement' (p. 275). Nevertheless, regardless of whether this goal of transparency is achievable, this assertion and promise of transparency encourages both government officials and teachers to seek out precision about what is required. In the search for transparency, a 'spiral of specification' (Wolf 1995, p. 55, Allais 2014, p. 147) arises in order to clarify the standards and create shared meanings and understandings. The clarifications and mechanisms for assurance then become so complex that transparency may further be lost. Furthermore, the process of adding layers of specification leads to a narrowing of the domain (Wolf, p. 55) to which the outcome relates. This reduces knowledge to that which fits the new specifications, overall resulting in 'narrowly specified bits of information' (Allais 2014, p. xx).

Torrance (2007) also suggests that 'transparency encourages instrumentalism' (p.281). 'Going ever-so systematically through all the steps, actually turns out to be instrumental in subverting the goal of assessment' (Sadler, 2007, p. 389). Elevating the focus of education to singularly and primarily the achievement of specified standards can lead to teachers and students regarding the role of teaching and learning as one and the same. This is commonly recognised as '*assessment for learning*' and while this has validity in terms of its recognition of the value of integrating learning with assessment, there has been a shift to the point where this is, to use Torrance's phrase, 'assessment as learning' 'with assessment procedures and processes completely dominating the teaching and learning experience' (2007, p. 291). Assessment therefore 'masquerades as, or substitutes for, learning itself' (Sadler, 2007, p. 388) and ultimately leads to altered perceptions of the purposes of assessment.

**The interface between assessment and accountability**

Governments attribute significant worth to accountability factors such as the comparative measures of PISA and TIMSS in order to ensure educational systems produce students who are globally competitive and will be able to contribute to the economies of the future. In order to meet these global expectations there is therefore pressure on governments to raise standards and monitor delivery of curriculum. To do this, student progress needs to be measured and schools and teachers made accountable for student achievement against such benchmarks. In New Zealand assessment results are reported on nationally on an annual basis, for example *NZQA, Annual Report on NCEA and New Zealand Scholarship, 2017*, and each school's results are publicly available. Through comparative analysis between subjects and years, the government aims to show progress in relation to national targets. However, there is a contradiction in play. Forms of curricula which focus upon critical thinking skills and generic competencies, such as *The New Zealand Curriculum*, are founded on expectations of teacher autonomy to determine local curricula in the best interests of students. When accompanied by standardised testing or highly specified standards-based assessment the flexibility of determining what is taught, is often weakened or undermined. 'The technical-managerial approach to accountability can in no way be reconciled with an approach in which responsibility is central' (Biesta 2004, p. 250). Schwartz (2009) explains that the United States move to nationwide standards has created accountability, which he regards as a good thing because it has shifted resources to those who need them and provided incentives for district leaders, but he argues that the challenge is to 'recalibrate the balance between top-down and bottom-up control' (p. 15). Similarly, Looney (2011) asks the question 'Is it possible to achieve an appropriate balance between bureaucratic needs for accountability and a strong role for teachers as professionals? (p. 5).

**Research Methodology**

Evidence for this paper is drawn from interviews, on-line surveys and official documentation. Semi-structured interviews of history department leaders in six secondary schools were undertaken through two interviews, a year apart, in 2014 and 2015. To select the participants, purposeful sampling (Patton, 2002, p. 169) using schools from a range of deciles (a method used to classify schools according to the socio-economic backgrounds of students and used for funding purposes) and teachers with a range of experience levels, was chosen to enable the research findings to be representative of the diversity of schools and of value to history teachers and policy makers across New Zealand. The teachers ranged from those with over twenty years' experience as Heads of Department, to those who had recently taken on the responsibility. The interviews, which had ethics approval, were undertaken by the author with no formal connections to the institutions in which the teachers worked. The interviews inquired into selections of historical topics for assessment and the principles upon which choices were made. Of the ten interview questions, the two questions which were most relevant and provided data for this paper were:

1. What were the most important factors in making the selections (of content)?

2. How did the different requirements for external and internal assessment impact upon your choices of topic?

The interview data was coded to categorise the factors contributing to teachers' choices of history content and these were further coded to distinguish comments which related to either internal or external assessments. Following the second interviews, points of difference between each teacher's comments in successive years were identified.

Four on-line surveys of history teachers undertaken by the *New Zealand History Teachers' Association* (NZHTA) between 2014 and 2016 provide a larger data set (refer to Table 5). The surveys inquired into teachers' views on examination papers, marking and results, and on whether changes should be made to the standards. Therefore, while the interviews focussed more broadly on school history programmes and their relationship to assessment requirements, the NZHTA surveys were more directly investigating teachers' views on assessment. Official documentation derived from the Ministry of Education and New Zealand Qualifications Authority (NZQA) on policies and requirements in relation to *The New Zealand Curriculum* and the NCEA, is also referred to. The combination of sources serves to triangulate the evidence and give validity to the findings.

[Insert Table 5 here]

**Research Findings**

Teachers have considerable concerns about the impact of assessment on the delivery of history education. In circumstances where assessment is closely controlled and where interpretations of requirements in the standards have shifted in subtle but significant ways since their implementation from 2011, there is increasing uncertainty over what is required of students and how best to prepare students. While the interviewees and survey respondents raised issues about the nature of the assessments which went beyond concerns over knowledge, the research identified the following as significant impacts of standards-based assessment on history programmes.

1. The narrowing of history programmes to focus upon selected concepts, skills and containable historical events at the expense of integrated learning and 'big picture' history.
2. The manner in which full alignment between the *achievement standards* and student assessments has resulted in 'generic' examination questions, which in turn has encouraged students to pre-prepare their responses and learn just sufficient to address the question(s).
3. The rising expectations of students' levels of achievement year after year which has led to more detailed responses. When coupled with the overall drive to improve grades through reducing the number of standards being attempted, the breadth and range of knowledge is reduced.

***1. Narrowing of history***

Teachers recognised that their history programmes had narrowed. Of the six research participants five directly commented that they believed such narrowing was problematic while one participant continues, for some standards, to teach broader topics leaving it to the students to choose a narrower focus to prepare for the examinations. A key factor contributing to the narrowing is the way in which the selected disciplinary concept or skill for each standard becomes the focus and framework for the teaching and learning. This impacts upon the capacity of teachers to freely and authentically deal with an historical topic in terms of both breadth and depth and dissuades teachers from bringing in other relevant concepts or skills when applicable. The reality of designing programmes to address the individual standards is that the targeted aspect, such as *perspectives*, provides a narrowed frame for examining a topic. In an interview, Linda (pseudonyms have been assigned to the interviewed research participants) comments that –

> I think what has changed is the fact that we are not delivering a detailed narrative through the topic as much. We're using the topic to deliver a concept or a skill so it might be historical sources working with historical sources or it might be working with causation. So that becomes the driver and it changes the way we deliver the topic. I think the students are the poorer conversely because they are being driven towards this narrow definition of what history is. It's an event and it's about causes and consequences about that event.

In this comment Linda also points to the way in which the focus upon an *event* for many of the achievement standards (refer to Table 3) has encouraged a narrowing to a containable single historical event. Examining an historical theme, a broader historical period, or continuities and changes over time are less suitable for most standards. Illustrating the focus upon an event using an example from a Level 1 programme in her school, Linda explained - 'So we just take (the) Montgomery (Bus Boycott) out of black civil rights and … we don't want our textbook on black civil rights anymore - we just want one chapter'. Matthew advocates that it is important to 'get the big picture of everything that is going on as opposed to just these small bits' and suggests that in the current structure there is 'not that scope to think about the bigger picture … trends and patterns get lost'. He then explained why teachers design programmes in this manner – 'Because I guess you want kids to pass ultimately'.

However, teachers do point out that the history standards which require students to undertake research (AS910001, AS91229 and AS91434) and communicate their findings (AS91002, AS91230 and AS91435) (refer Table 3), are generally considered to be working well. For these standards, undertaken at any point during the school year, teachers design and mark the

assessments. This means teachers have greater control over outcomes and can require students to investigate longer periods of history, or investigate a topic more holistically, if they wish.

Further encouraging the narrowing of students' studies in history are mechanisms known as *certificate endorsement* and *course endorsement* introduced by NZQA (the body overseeing the NCEA qualification) to recognise high achievement and incentivise learners to apply themselves and go beyond *just* achieving the standards. The NCEA certificate records all standards which students achieve, and the certificate as a whole, or an individual course, may be 'endorsed' as 'Merit' or 'Excellence' where students gain the required number of these higher grades. Students are astute in making their own decisions not to attempt particular standards. They seek to reduce the number of standards in order to gain the remaining standards at a higher achievement level. Most schools also limit the number of *achievement standards* they teach each year and each of the six research participants identified at least one of the six achievement standards at each year level which were not included in their programmes. For history one common way of achieving this reduction is to complete fewer externally assessed standards. The three hour examination for the *external* standards can then be dedicated to completing the assessment for just one standard, or two standards, which gives time for writing lengthy answers. Matthew explains the reality that there is greater value inherent in gaining higher grades of achievement for fewer standards, while the acquisition of more credits accrued through sitting additional standards is perceived to have little value.

> You get your three excellences for the internal standards and one for the external and that is your endorsement. You know, no one is giving a prize for the kid who gets 120-130 excellence credits. People really stop caring once you get 80 of them.

> Students become very focused on only what is required for the exam throughout the year. Content is not as big a focus – history skills are. A balance needs to be achieved to ensure they are gaining both. Also, the now fashionable option of withdrawing students from a paper as they want excellence. It feels like there is so much focus on credits and excellence instead of developing all necessary history skills. (NZHTA Survey, 2015, Comment 13, p. 38)

While Sadler (2007) has suggested that it is problematic that components targeted in standards are commonly addressed just once before moving on, this is therefore further exasperated in New Zealand by the non-engagement with many of the standards in the first instance. The incentive to reduce standards also impacts upon knowledge of historical content as it encourages minimising the number of historical 'topics' studied in each year's programme. Whereas a Level 1 programme, prior to the introduction of standards-based assessment in 2002, contained six topics for the national examination, the number of topics studied in a year is now likely to be three, with perhaps only one topic used for the examination and two for the internally assessed standards. Four of the six research participants taught three topics in the year's programme, one taught two topics and the remaining participant included three topics for assessment but briefly addressed a further topic to provide context. However, in assigning some standards to the 'untaught basket', learning opportunities can be lost and the cohesion of the discipline of history can be affected.

The external standards most commonly left out of history programmes are those requiring study of New Zealand history (AS91006 and AS91234). In 2016 only 33% of Level 1 students and 18% of Level 2 students sat these standards (NZQA, *Secondary statistics*). Through non-participation, propositional knowledge of New Zealand's past is weakened. Similarly, many

students did not sit the source interpretation standards (AS91003, AS91231, and AS91436). For example, in 2016, just under half of the students at Level 2 attempted the paper examining interpretation of primary and secondary sources even though this standard targets a universally recognised core disciplinary skill in history. The avoidance of the source interpretation standards largely arises because the historical topic used for the sources examination is not known until the time of the examination and therefore cannot be prepared for. This produces uncertainty for candidates. Since the topic is not taught during the year, it also contributes to the narrowing of school history programmes.

2. ***Pre-preparation of examination responses – the 'generic' examination questions***

The implementation of a well aligned triage of curriculum, standards and student assessment in circumstances where there are no prescribed history topics, has been facilitated through the introduction of 'generic' questions. For most of the externally assessed standards, the exception being those assessing source interpretation, each examination paper contains a single question designed to be capable of being answered using any historical content. Because the questions are required to precisely assess the *achievement standard*, they are written in a manner which closely matches the wording of the *achievement standards* criteria (refer to Table 6). While this alignment is seen as desirable and a fundamental feature of standards-based assessment (Looney, 2011) when put into practice it provides the circumstances for students to fully pre-prepare their responses and gives little incentive for students to learn beyond the narrow confines of the requirements of the examination question.

[Insert Table 6 here]

The generic approach to the questions also leaves the examiner with little room to manoeuvre so examination questions are relatively predictable. In a 2015 NZHTA survey history teachers were asked to consider the main issues with the current achievement standards. Of the 87 respondents, 63% felt that 'The external standards put unreasonable/unnecessary constraints on the nature of exams'. In the NZHTA survey on the 2014 examinations there were also 27 comments expressing concern about the difficulties arising from the generic questions and on the capacity for students to rote learn their essay answers. For example –

> The question is too predictable and as a result many students attempt to rote learn essays written in class. This is not really a good assessment of their understanding of the event – just an assessment of how well they can memorise material (NZHTA Survey, 2014, *The Papers*, Comment 21, p.17).

These difficulties associated with generic questions were specifically mentioned by five of the six interviewees when discussing their selections of content. Karen commented

> I love having the freedom I do, you know (but) what I perhaps don't like so much … is that we have got these generic questions which are lending themselves to rote learnt answers.

Bianca recognised that students could 'rote learn a fairly good essay and get an excellence because the question doesn't really change' and Stephen commented on the prevalence of the practice - 'everyone is going in with a prepared answer'. Matthew viewed the process as 'game playing' saying that teachers 'make the essay standalone so the students can copy it (and) take it away for preparation for the externals'. Matthew also put the success of the students down to

the extent to which teachers provide students with quality answers. He argued that 'if the teacher can write the main causes and consequences essay, the students can rote learn (and) do well, but if the teacher can't, the students are going to struggle'. Reflecting on his own practice he commented that 'I think I can prepare (an essay) to get excellence but I'm trying not to do that. Morally I don't think it's right but I know it is happening.' Linda suggests a feeling of powerlessness – 'the person absolutely committed to the generic world would say that it is all in the hands of the teacher. They have all the power to change the scenario if they want to [with open choice of content] but I would argue that we are hamstrung by the structure of the standards'.

The examiner however, is faced with a dilemma. While the opportunity to fully pre-prepare answers is clearly viewed as a major concern arising from the generic questions, teachers also voice their concerns when examinations depart from the exact requirements of the standards. On occasions when the examiner has tried to introduce a new twist on the generic question to avoid its inevitable sameness from year to year, teachers have been outspoken in their complaints, particularly when the altered question disadvantages their students through the selected topic being a poor fit. The examiner is then accused of not sticking to and honouring the standard.

> If they are going to have generic questions, I would just wish that they then don't try and change it by adding in random little words to … trick the students because that's really frustrating. It throws them off guard (Bianca).

> For some reason a moronic person set this exam [for AS91006, 2014]. It featured words 'action' and 'reaction' which don't even appear in the standard!!! It was completely

> unfair and totally unexpected that the whole standard would be sabotaged in this way. (NZHTA Survey, 2015, Comment 54, p.16).

It is the combination of the tight adherence to written standards alongside freedom of content which has had such an impact on the delivery of history education in New Zealand. Where students can pre-prepare their answers, knowledge which sits beyond the parameters of the requirements of an examination question, is viewed as having little worth. As the respondents from one history department observed –

> We have come a long way down the generic pathway with some unexpected consequences. We have doubts whether we could, without the decades it took to develop, re-establish the rigorous character of school History as it was' (NZHTA Survey, 2015, Comment 1, p. 42).

***3. Rising expectations and uncertainty***

Also arising from the generic questions is the perception and reality of ever higher expectations and the impact this has on what and how students learn. In circumstances where students can pre-prepare their examination responses there has been a progressive shift in expectation that answers provide ever greater detail. This has encouraged teachers to focus upon depth of response at the expense of breadth. In the 2015 NZHTA survey the broad questions 'To what extent should there be changes to the standards to improve them?' and 'What do you consider are the main issues with the current standards?', gave rise to 21 specific comments that there was a lack of clarity over what was required and that more is expected year on year for the equivalent grades (pp. 33 – 39). Only one respondent expressed the view that he or she was certain of requirements - 'I have got to the stage where I can work out what we have now'.

Each of the six research participants similarly reported concerns over rising expectations and feelings of uncertainty. Stephen commented on the way markers were 'looking for more' which he suggested was a 'by-product of the fact that everyone can prepare' their answer. Karen illustrated how extra elements are being expected in student answers giving the example that 'historiography seems to be creeping into Level 2 as well'. Linda commented that 'it's insufficient to just do it in depth, you have to do it in depth plus, plus more. The standard just incrementally creeps up which is why we dropped Achievement Standard AS91438 this year. We get swamped by the need for detail'. Since students are not required to address all of the external standards during the examination, where students only do one standard they can write longer, more detailed answers in the examination time allowance. As one teacher observed 'Some schools are encouraging students to spend three hours to write an essay – this means each year the benchmark to pass is being raised higher and higher (NZHTA Survey, 2015, Comment 44, p.16). This phenomenon is exemplified in the following comments.

> Essays that three years ago would achieve a Merit, are now only attaining Achievement and (there is) the emergence of the super-essay to gain Excellence' (NZHTA Survey, *The Results*, 2014, Comment 26, p. 15).

> They seem to shift the goals posts every year. It is almost impossible for students to get Excellence unless they write 1500-2000 words (NZHTA Survey, *The Results,* 2014, Comment 52, p. 20).

While it could be argued that rising expectations have led to, or are a reflection of, improved outcomes with students successfully handling greater detail, teachers' responses do not suggest that this is a sensible or a viable development.

> We have an absurd raising of the bar each year …The standard should not be set by the outstanding but instead by what is required by the Achievement Standard – I no longer trust this is occurring or we would not see this huge rise in demands (NZHTA Survey, 2015, Comment 1, p. 45).

> Students might know more about one discrete event and therefore that might be considered of benefit to them but I think the risks and what is lost from that is greater than any small benefit they might gain from knowing more about that one event (Linda).

In addition to the reduced number of standards addressed by students, the rising expectations and increasing length of answers can also be attributed to a statistical mechanism *Profiles of Expected Performance* (PEPs) which were instituted as a means to distribute the Achievement, Merit and Excellence grades in similar percentages from year to year for the examinable standards. Percentages for each grade are based, according to the NZQA, on 'historical information, statistical analysis and the professional judgement of marking Panel Leaders and NZQA staff' (NZQA, 2011, p. 66). While the purpose of PEPs is sound, in that they provide some measure of consistency in the allocation of grades, they have drawn the criticism that the PEPs determine the standard rather than the achievement criteria. 'There is a huge problem with these generic questions because it is the marking panel and the PEP that determines the standard, not the standard (itself)' (NZHTA Survey, 2014, *The Papers*, Comment 22, p. 29).

In the belief that the required standard is continually on the rise, teachers are being driven to constantly fine tune their teaching and curricula choices to meet assessment ends. The editor of the Auckland History Teachers Association, e-mailed all members in August 2016 with suggestions on how to improve the essays still further.

> Students should aim to include historiography and some memorised quotes to add impact and authority to their essays.

He then notes that:

> **Neither** of those requirements (historiography or quotes) are in the standards or assessment specifications. But the essays in the popular causes and consequences standards have tended to become a bit predictable over successive years. Anything you and your students can do to lift essays above just average attempts, should pay dividends. It is clear that over the past several years NCEA history has become an 'arms race' of rising expectations – longer and more fluent essays gaining better results.

Adopting such suggestions means that both the propositional historical knowledge taught to students, and teachers' approaches to disciplinary skills, are undergoing change and expansion as teachers seek to gain an edge in assessment.

Teachers have noted that longer answers are also a feature of internal assessment. Bianca explained that 'some of the assignments would get up to 5,000 words' for their response to the standard which assesses an historical inquiry AS91435 *Analyse an historical event, or place,*

*of significance to New Zealanders*. However, she did not feel that this was driven at national level saying, 'so I wonder if it's us doing it. I also sometimes wonder if it's just the students, they just kind of think if we keep going, if I keep explaining more I'm going to get a better (grade) - quantity over quality sort of thing'. The National Moderator, who moderates the internal assessment grades nationally, commented that 'Students, particularly at Level 3, sometimes produce a far greater breadth of evidence than is needed, even for Excellence' (NZQA, Moderator's newsletter, August 2016). The overall shift in many school programmes to greater depth and fewer standards, can therefore be seen for both internal and external assessment and the added depth places pressure on the time available for teachers to go beyond the assessed knowledge to gain the standards, to broader framework knowledge.

*Transparency in interpreting the standards and assessing student work*

Linked to the concerns about the rising expectations is that the goal of transparency in interpreting the achievement standards comes into question. The NZQA has in place measures to achieve their goals of transparency and fairness of assessments (NZQA, *Understanding NCEA*). This includes rigorous checking and critiquing of examination papers, the provision of assessment schedules and examination panel leaders reports, returning marked examination papers to all students following the publication of results for the NCEA examinations (a feature which is unique to New Zealand according to the NZQA, *Understanding NCEA*) and enabling students to apply for a reconsideration of their grade. The latter provides an opportunity for teachers to scrutinise student answers and results and gain professionally from a greater awareness of how grades were allocated.

Nevertheless, survey comments indicate that teachers have concerns about the examiners having expectations beyond the criteria in the standards, or that the criteria on which answers

were marked lacked transparency, or that the marking was inconsistent. An analysis of the survey responses concerning the 2014 examination question for AS91005 *Describe the causes and consequences of an historical event* reveals that 13 of the 31 comments made specific mention that the question expected students to discuss the 'significance' of an event and therefore went beyond the requirements of the achievement standard (NZHTA Survey, 2014, *The Papers*, pp. 16-18).

After receiving the results back from the 2014 examinations, teachers in the survey conducted in early 2015 wrote:

> Wondering what on earth students have to do to get Excellence … It seems like the markers are not adhering to the achievement standard but have a standard all of their own that we are not privy to (NZHTA Survey, 2015, Comment 4, p. 14).

> I have numerous students that have answered … very very well with specific examples and quotes etc. and a lot of detail and still only got Merit. They come to me asking why??? and I can't actually give them an answer (NZHTA Survey, 2015, Comment 20, p.15).

So while the purpose of a *standard* is that the qualities required for success are stated ahead of assessment and that they can be consistently measured, teachers' experiences are that the standard is neither transparent or immovable. The uncertainty influences teachers' decisions on what historical knowledge to teach with a common response being to narrow the field of history and engage in that field with greater depth.

**Discussion**

The empirical evidence suggests that social realist concerns about the marginalisation of knowledge are justified in circumstances where a standards-based form of assessment exhibits the commonly practiced features of segmenting knowledge into manageable units for assessment and where accountability for grades encourages teachers to narrow knowledge in order to focus closely and almost exclusively on assessment requirements. While the enactment of standards-based assessment in New Zealand meets the fundamental design goals recognised and utilised widely across the world with the three elements, the achievement standards, the *Curriculum* and student assessments, appropriately aligned (Looney, 2011) this study points to problems when other variables come into play. In particular, it illustrates the difficulties of assessment when the knowledge to be taught to students, through an 'empty curriculum', is so open that generic examinations questions are required to provide access for all. It therefore points to the problem of designing assessments for contemporary curricula which espouse learner-led goals, flexibility, and prioritising generic competencies over prescribed knowledge.

Sadler (2014) speaks of the futility of attempting to codify standards, that they will always be 'elastic in their interpretation' (p. 275). He argues that more detailed descriptions cannot make meanings clearer because 'their specifiers are in turn of the same essence and type as the main elements. … All of them are fuzzy and do not lock things down definitely' (p. 279). This study also illustrates that transparency in assessment is an unobtainable notion – that the written descriptors cannot provide teachers with a clear understanding of *what the standard is.* While this view is supported through research by Sadler (2014), Looney (2011), Rawlins et al. (2005) and others it is not always recognised by policy makers. NZQA, instead has aimed to clarify the standards. The experience in New Zealand therefore concurs with Allais' research that there is a spiral of specification in an attempt to make transparent the limited original statements in *standards*. The body of documentation has continually expanded over the period of enactment,

for example *clarifications* documents, and as a consequence, there have been re-interpretations, shifts in emphasis and clarifications of the standards on an ongoing basis (see NZQA, NCEA Subject Resources).

Various mechanisms such as the PEPs, course and certificate endorsements, and grade and cut-score marking, which allocates numerical scores to differentiate within grade bands (refer to Table 7) have also been introduced over the period of the NCEA to overcome issues as they have arisen and are indicative of the complexities and difficulties of implementing the standards-based system in New Zealand. While not all mechanisms have had a direct impact upon knowledge, their combined weight has influenced conceptions of knowledge (see Ormond, 2018).

[Insert Table 7]

As shown through this case study in history education, the standards have had a reductive effect on knowledge, narrowing the historical topics selected to address the standards and dis-incentivising engagement with more comprehensive history programmes and 'big picture' history. While not common to all standards-based systems across the world, the facility in New Zealand to selectively choose standards while ignoring other standards normally seen as critical to any study of history, is actively encouraged. Both the drive by students and teachers to gain higher grades and the desire by policy developers and teachers to avoid over-burdening students with assessment, has seen the number of standards addressed by students declining each year. The course endorsement mechanism, in particular, has put a higher premium on grades for few standards at the expense of credits gained over a greater number of standards.

The pressure to reduce the number of standards is an accountability matter. Students' grades and therefore teacher responsibility for such results are paramount when school performance is publicly compared in league tables. Nationally, locally and at teacher level it becomes important to 'play the game' efficiently to produce results. In a 2012 NZCER report 53% of teachers agreed or strongly agreed with the statement 'I feel under pressure to boost my students' NCEA results' (Hipkins, 2013, p. 17) and, in 2015, this figure was 77% (Wylie and Bonne, 2016, p. 22). One of the research participants echoed this finding commenting that,

> I feel under pressure to improve my students NCEA results. We are quite results driven in terms of government targets around percentage of kids getting Level 2 and that's sort of what we are held accountable for. So it is really about getting results' (Stephen).

He is referring to a policy which states that 'To boost skills and employment the government has set a Better Public Service target that 85% of 18-year-olds will have achieved NCEA Level 2 or an equivalent qualification in 2017' (Ministry of Education, 2015).

The concern history teachers expressed about the narrowing and reductive effects of standards on their teaching programmes has also been identified for other senior secondary subjects. A survey by the New Zealand Council for Educational Research (NZCER) comprising one in four teachers in the secondary sector, showed that 51 percent agreed or strongly agreed that changes from 2011 in 'the NCEA had narrowed the curriculum for my students'. Mathematics and Sciences teachers rose above this average with 63 percent expressing concern about this effect (Wylie and Bonne, 2016, p. 25). 43 percent of respondents to the survey also identified

the NCEA requirements as a barrier to making changes or maintaining the quality of the curriculum.

In an environment where accountability for national assessment is often in the public headlines, a teacher explains that such strong oversight at national level is driven by the desire to follow a risk aversion strategy.

> We are concerned that the assessment process is too subject to NZQA's obsession with risk management, leads to interference and manipulation of the assessment process through a fixation on the damned PEPs they claim not to use but persist in clinging to. Examiners should focus on examining the standard, checkers should check it has been examined and markers should focus on how the student has measured up against the standard. We thought the grade score marking was supposedly there to guard against 'serious blow-out' of grades – whatever that means in a supposedly standards-based system. Perhaps NZQA is reluctant to use these and the cut scores because that would transparently reveal scaling (where trying to persuade markers to blur the edges is less obvious and allows central deniability) (NZHTA Survey, 2015, Comment 46, p. 16).

More specific to history is the findings related to the generic questions. For history the combination of the freedom of what content is taught alongside a highly specific and narrowed framework for what is assessed and how it is assessed, has strongly impacted on what knowledge is taught. While over prescription and expectations of coverage burden teachers in many nations and lead to students being extensively coached over the line (Sadler, 2007, p.390), in New Zealand the generic questions for a number of the external standards, which vary little from year to year, are what encourage coaching, rote learning and consequences for

the allocation of grades. Differentiation between grades is perceived by teachers to be increasingly reliant upon extensive detail and expectations which go beyond the requirements of the standards. The capacity for the pre-preparation of examination responses may also undermine a broad goal of new curricula - to produce flexible learners who can adapt in new situations. While governments' desire to enhance the future employability of their citizens and their contribution to society, educational mechanisms and practices can reduce the potential benefits.

**A future for standards-based assessment in New Zealand**

The New Zealand experience in history education provides valuable indicators for what can transpire with a segmented form of assessment and mechanisms which compound and reward a reductive response to knowledge. However, a shift in the variables is likely to have significant and different outcomes where the benefits identified for standards-based assessment, such as improved students understanding of what is required through clearly signalled goals for learning, may come to the fore. For example, while the absence of defined common topics for history studies has created complexities for assessing history, more flexibility in applying the standards within an open curricula environment, may alleviate some of the difficulties. To address the reductive impact where critical standards are left out, and where standards are assessed individually, a body of standards could be collectively assessed so that for example, responses to an examination paper might provide the required evidence for a number of standards. Similarly, where standards are written with a broader range of components or where the alignment between a standard and the wording of its parallel assessment is more holistically interpreted, the outcomes could be fundamentally different. Looney (2011) suggests that 'rather than thinking of alignment literally… it may be more appropriate to approach it as a matter of balance and coherence' (p. 3). This may be the way forward to enable

knowledge to be taught and learned in a more cohesive way, where relations between concepts are managed and assessed in ways that are authentic within their particular disciplinary fields.

**Conclusion**

The model of standards-based assessment implemented in New Zealand espouses features which are maintained to be beneficial to the success of outcomes-based educational systems. Transparency and clear alignment between curricula and assessment are principles which underpinned the development of the achievement standards. However, these factors have emerged as a contributing constraint on history. While the curriculum is broadly stated, the standards are envisaged as precision tools for measurement. The need for assessments to be written in a manner which tightly adheres to the wording in the standards has not provided the flexibility for teachers or assessors to fully support the open selection of historical content. While few subjects have gone as far down the path of exactitude as history with a single generic question asked in many of the history examinations, the precise measuring against stated standards is evident in assessment across all secondary subjects. Through the segmentation of subjects into assessable components, standards-based assessment in this form can have the effect of narrowing knowledge to the minimum of what is required for assessment and an overall reductive impact upon substantive knowledge. The case of history in New Zealand therefore has implications for curricula development and assessment practices in other international settings. Where curricula goals are overly broad, and where curricula position competencies and skills as the key learning objective, there can be unforeseen implications. High levels of imposition at the accountability level of educational practice through assessing defined standards can undermine best practices in the delivery and selection of knowledge.

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