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*Teachers' Conflicting Responses to Change: An Evaluation of
the Implementation of Senior Social Studies for the NCEA,
2002-2006*

A Thesis presented in partial fulfilment of the degree of
Doctor of Education (EdD)

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ABSTRACT

The thesis provides a socio-historical perspective through which to evaluate the first five years of implementation (2002 to 2006) of social studies within the National Certificate of Educational Achievement [NCEA] in New Zealand secondary schools. The experiences of both lead educators, with responsibilities at a national level, and classroom teachers provide insights into the personal, contextual and institutional factors which have enabled and constrained the implementation process, especially at NCEA level one.

The inclusion of social studies as a subject for the new qualifications and assessment system in New Zealand, the NCEA, heralded a significant opportunity for this integrated subject to gain academic status and acquire a unique identity within the senior secondary school curriculum. Paradoxically it set a relatively strongly framed assessment system beside a curriculum that has traditionally been weakly classified and framed (Bernstein, 1971). This paradox has created tensions for teachers who have responded in different ways, from full implementation to a more functional approach.

Two groups of teachers were identified in the course of this study. The idealists are passionate advocates for senior social studies and are likely to implement it to all three NCEA levels in their school. The pragmatists, on the other hand, are more likely to offer only level one social studies, typically to their more academically able year 10 (Form 4) students for extension purposes, and also to induct them into the assessment requirements of the NCEA system before they study the traditional social science subjects at levels one, two and three. This pragmatic approach reflects past practices of the pre-NCEA, School Certificate era (1945-2001). It continues to reinforce the low status and unclear identity of senior social studies within the social sciences as well as within an already overcrowded senior school curriculum. At the end of this first five year period of implementation the viability of senior social studies is at a critical juncture, with its on-going success not yet assured.

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LIST OF ABBREVIATIONS & ACRONYMS

Research Participants

INF = Informant -	Lead educators interviewed during the elite interview phase
PAR = Participant -	Teachers of level one social studies participating in the four day action research cycle
RES = Respondent -	Teachers of level one NCEA AS90218 who responded to the postal survey

Acronyms used in this Thesis

ANZFSSA =	Aotearoa New Zealand Federation of Social Studies Associations
AS =	Achievement standard
CMP =	Curriculum Marautanga Project
DoE =	Department of Education
ERO =	Education Review Office
HoD/HoF	Head of Department/Head of Faculty
MoE =	Ministry of Education
NCEA =	National Certificate in Educational Achievement
NCSS=	National Council for the Social Studies
NQF =	National Qualifications Framework
NZC =	<i>New Zealand Curriculum</i>
NZCER=	New Zealand Council for Educational Research
NZCF =	New Zealand Curriculum Framework
NZHTA =	New Zealand History Teachers' Association
NZPPTA =	New Zealand Post-Primary Teachers' Association
NZQA =	New Zealand Qualifications Framework
SSiNZC =	<i>Social Studies in the New Zealand Curriculum</i>
SSoL =	<i>Social Studies Online</i>
TKI =	Te Kete Ipurangi
UK=	United Kingdom
USA=	United States of America

Other

Externals=	Externally-assessed achievement standards
Internals=	Internally-assessed achievement standards
<i>Handbook=</i>	<i>Handbook for social studies teachers forms 3 & 4</i>
<i>Syllabus Guidelines=</i>	<i>Social studies syllabus guidelines forms 1 to 4</i>

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CHAPTER ONE: INTRODUCTION

SOCIAL STUDIES ENTERS THE SENIOR SECONDARY SCHOOL

I feel incredibly concerned ... as passionate as I am about social studies, I feel very concerned about where we are heading. I feel that, after some number of years, it [senior social studies] is still on very shaky ground. Our numbers are growing clearly, and I think there is expertise that is growing as well, but I still don't have a sense that as a community we have a clear direction in terms of where we are heading (INF7).

1.1 INTRODUCTION TO CHAPTER ONE

A new era for the social studies community was heralded in 2002 with the introduction of the National Certificate of Educational Achievement [NCEA] (Appendix A). The inclusion of social studies as a subject for this new assessment and qualifications system in New Zealand senior secondary schools provided a significant opportunity for the subject and its education community to achieve academic maturity and credibility. Throughout its sixty year history, the subject has struggled to establish a unique identity within the social sciences and to gain status as a credible academic subject within secondary schools. The social studies education community greeted its inclusion within the NCEA with optimism, for a long held ambition of many enthusiasts was about to be realised. At the end of the first five years of implementation, however, senior social studies has experienced mixed success, especially in terms of widespread uptake from levels one to three. The limited contribution of social studies to the social sciences, especially at level one, is highlighted in chapter five, Tables 14 and 15. The change to a new assessment and qualifications system has provided significant opportunities for social studies in the senior secondary school but has also uncovered unresolved issues from past curriculum and assessment developments which continue to plague the subject.

This thesis examines the responses of teachers to the implementation of senior social studies within the NCEA in New Zealand secondary schools over its first five years, 2002 to 2006. Narratives from interviews of seven lead educators in the social studies community are analysed together with the experiences of a group of four classroom teachers of NCEA level one social studies. In addition, teachers' responses to a national postal questionnaire to schools are used to more broadly contextualise the stories from the lead educators and the group of classroom teachers.

Chapter one contributes to the overall thesis by setting the scene. A brief historical background to the topic is followed by the central proposition and four research questions through which this proposition is developed and evaluated. The origins and nature of the research and the structure of the remainder of the thesis are described.

1.2 BACKGROUND TO THE RESEARCH

Social studies, although far from being a new subject in the secondary school curriculum, is regarded as 'a less mature subject' in terms of content and purpose. Aitken (2006) described a less mature subject as one "...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" (p. 7).

Since its inception as a compulsory core subject in the junior secondary school as the result of a recommendation of the Thomas Committee in 1944 (Department of Education [DoE], 1959; Keen, 1979), social studies has been variously derided as "the nebulous Cinderella of the curriculum" (Wendt Samu, 1998, thesis title), "an emasculated intellectually lightweight 'third subject' " (Meikle, 1994, p. 110), "a dash of this and a dash of that" (Meikle interviewed in Openshaw, 1991, p. 17), "not a real subject" (Barr, 2000, p. 6), and "a compendium of clichés" (Education Forum, 1996, p. viii). The contested genesis and lowly status of social studies

have been on-going concerns to social studies commentators such as Graeme Aitken (2005b; 2006), Hugh Barr (2000), Fiona Beals (2001), Pamela Benson (1998), Philippa Hunter and Paul Keown (2001), Phoebe Meikle (1960, 1994), Andrea Milligan (2006), Carol Mutch (1998, 2003), Roger Openshaw (1992, 1996/97, 2004), Kelvin Smythe (1998), Keith Sullivan (2001), Rowena Taylor (2005) and Tanya Wendt Samu (1998).

Social studies was intended by the Thomas Committee recommendations in 1943 to be an integrated subject, drawing upon the discrete subjects of history, geography and civics (DoE, 1959) plus some descriptive economics (Whitehead, 1974). Guidance and strategies for integrating the subjects, however, were not provided in the early years (Evison, 1963) nor were they forthcoming in later years (Keen, 1979; McGee, 1998). Teachers of the newly integrated subject's principal components (history and geography) "were immediately hostile to the interloper" (Openshaw & Archer, 1992, p. 50). As a result social studies has struggled to carve out a unique identity within the social sciences since its inclusion in the curriculum more than sixty years ago. An attempt to introduce social studies in form 5 (year 11) as a non-examinable subject did occur thirty years ago with limited success. Twenty schools had adopted the subject in 1976 (Austin, 1985). The introduction of social studies as an approved subject for the NCEA from 2002 thus provided another 'window of opportunity' for it to forge this unique identity.

Teachers' responses to social studies curriculum developments have varied over its six decade history. The responses have tended to fall into two groups - those teachers who embraced the new, integrated subject and others who preferred the perceived greater level of academic rigour of the discrete social science subjects, particularly of their personal parent discipline such as history or geography. More recently, teachers' responses to the change to standards-based assessment practices in the senior secondary school, particularly the introduction of the NCEA since 2002, have been analysed (Alison, 2005; Hipkins, 2007b). No other

post-NCEA study has been undertaken specifically in relation to social studies, however. This thesis is therefore both timely and necessary.

Chapter one continues by presenting the central proposition of the thesis and the research questions.

1.3 CENTRAL PROPOSITION

The thesis examines the implementation of senior social studies during the first five years, 2002 to 2006, using a socio-historical perspective or lens. A socio-historical perspective considers both the sociology and the history of the development of school subjects. The central proposition is that teachers have experienced different and, at times, conflicting responses to the implementation of senior social studies in the NCEA, especially at level one, during the initial five year period. These experiences are represented by the teachers' conflicting narratives. This central proposition is guided by four research questions:

1. How have the differing personal and professional dispositions of teachers impacted on the implementation of senior social studies?
2. How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?
3. How has the introduction of standards-based assessment enabled and constrained the implementation of senior social studies?
4. To what extent have the professional communities of practice supported teachers in their implementation of senior social studies?

The thesis, therefore, focuses on the reported dispositions and experiences of the teachers, the nature of the social studies curriculum, the evolution of standards-based assessment as it relates to social studies, and the institutional and organisational support provided to these contemporary pioneers. The responses reflect the different perspectives of the lead educators and classroom teachers in the implementation process over the initial five years of the NCEA.

1.4 THE ORIGINS OF THE RESEARCH

The spark that ignited my interest in researching senior social studies, especially the values exploration process that was the focus of my early deliberations, occurred during an NCEA training day in 2002. A teacher told the story of a simulation activity she had conducted with an NCEA level one social studies class about boy racers using The Square in Palmerston North. The activity identified various people who might have opinions about boy racers, and located where they might be living on a map of the area. The people included a 'little old lady' living by an intersection who was disturbed by the noise of the boy racers. The teacher observed that a group of students in her class had no conception that the 'little old lady' was entitled to have an opinion on this issue. No empathy at all was shown towards the 'little old lady' and the fact that the boy racers were keeping her awake at night. In fact, one of the students commented that they should go and 'do her in'.

The sense of helplessness underlying teachers' concerns about educating for social responsibility (Berman, 1990) versus the reality of 21st century teenagers' lack of social awareness was covered by laughter at the time. I recalled such a sense of impotence from my own teaching days and wondered about the efficacy of conducting values education with students, as required by *Social Studies in the New Zealand Curriculum* [SSiNZC] (Ministry of Education [MoE], 1997). Some time later, at the Aotearoa New Zealand Federation of Social Studies Associations [ANZFSSA] conference in September 2003, I listened to a similar concern being expressed by another teacher who was implementing senior social studies.

My interest in the values exploration process, one of the three social studies skills processes, deepened and I began thinking about the manageability of the current NCEA level one values exploration process achievement standard (AS90218 *Examine differing values positions*). I was concerned that this process was being treated as quite a dispassionate, objective exercise. While this activity was certainly manageable, it did not require students to deeply reflect on their own

values positions or turn their values inquiry into social action. Indeed, a colleague, Rose Atkins, and I had presented a conference workshop and written a book chapter exploring this same topic in relation to year 9 and 10 social studies (Taylor & Atkins, 2005).

During the first two phases of my data collection for this study, however, I realised that my concerns as a researcher were not the concerns of the classroom teachers. They had more pragmatic and immediate imperatives. The quote which commenced this chapter, from one of the lead educator (élite) interviews (INF7) caused me to decide to broaden and redefine my research. The change of focus is explained in detail in chapter two, section 2.3, but is introduced briefly below.

The initial focus on the values exploration process at level one was very narrow and widened during the data collection period. The redefined approach evaluated the first five years implementation of social studies for the NCEA principally, but not solely, at level one. Whilst the values exploration process is an internally-assessed [internal] achievement standard within the NCEA (Appendix A), both externally- [external] and internally-assessed standards were considered in the final study. Attention was given to values exploration but within much broader personal, curriculum, assessment and institutional contexts as revealed in chapters three to six.

1.5 THE NATURE OF THE RESEARCH

The thesis adopts a socio-historical approach (Wendt Samu, 1998). The historical account draws upon literature about past social studies curriculum developments and the evolution of standards-based assessment as the national credentialing model in New Zealand secondary schools. The writings of social studies curriculum commentators in New Zealand and the United States of America [USA] as well as on assessment and qualifications commentators provide this historical context. The sociological account considers the role of society in deciding the nature and method of knowledge transmission to future

generations. The thesis draws specifically on the works of Basil Bernstein (1971, 1996) to discuss reasons for the lowly status of social studies as a secondary school subject and its unclear identity compared to its social science siblings.

In terms of a theoretical framework to explain how the teachers and lead educators in the study act within this socio-historical setting, the thesis draws upon five sources. Pierre Bourdieu's social-field theory (Bourdieu, 1977, 1990) as related to social studies in New Zealand (Mutch, 2006) is employed throughout the thesis. The social-field of senior social studies education is viewed as a dynamic entity or game, with key players interacting, competing and collaborating within an objective structure. The game has rules or constraints which must be adhered to by the players. The habitus or subjective dispositions of the key players constitute a major role in the outcome of the game. In this study, the educational capital of the players also impacts on the outcome. In terms of the findings of the study: (i) a continuum of stages a new subject can proceed through to achieve maturity (Layton, 1972); (ii) a typology of teachers' adaptations to policy change (Brain, Reid & Comerford Boyes, 2006); (iii) a schema for analysing teachers' interests of reflection (Louden, 1991); and (iv) a typology linking qualifications and assessment discourses to educational ideologies (Dobric, 2005); are also utilised to add meaning to specific chapters of the thesis as appropriate.

The study is largely qualitative. It analyses the narratives and responses of key players in the senior social studies community. The data was collected during four data gathering phases. Firstly, elite interviews were conducted with seven lead educators during 2005 and 2006. They are called elite interviews because of the unique insights shared by lead educators who held a wide number and range of national leadership and academic roles, with several fulfilling more than one role. Two were also classroom teachers. The second phase comprised a group of four classroom teachers from the lower North Island who were implementing NCEA level one social studies. This group met for four days over a 12 month

period during 2005 and 2006. The third phase of data gathering comprised a postal questionnaire sent nationally to schools offering level one social studies towards the end of the data collection period in 2006. The final phase of data gathering included statistics from the New Zealand Qualifications Authority [NZQA] and ANZFSSA documents.

The analysis focuses on the lead educators' and classroom teachers' interview narratives and on classroom teachers' responses to the postal survey. Collectively, the lead educators and classroom teachers are termed 'teachers'. At times the teachers' responses stood in sharp contrast to each other, at others they formed points along a continuum of reported experience. In some cases, the responses of lead educators were similar to classroom teachers, at other times their responses diverged. On the one hand, responses of both lead educators and classroom teachers sometimes revealed a high level of optimism, motivation, and desire for success. These narratives were ones of ease, hope and possibility. On the other hand, the narratives and responses of classroom teachers also revealed the daily reality of their working lives in implementing a new, lightly prescribed or weakly classified subject at this level within a context of 'high stakes', strongly framed assessment system. The conflicting narratives have been synthesised and discussed towards the end of the thesis.

Overall, the thesis therefore provides an evaluation of the progress of senior social studies towards maturity as a senior secondary school subject (Layton, 1972; Taylor, 2005) during the first five years of its implementation journey. This maturity is considered in terms of both social studies' status as a credible academic subject and its unique identity within the social sciences. Finally, recommendations are made for further development and research on the basis of the findings of this small-scale, exploratory study.

In subsequent chapters the thesis proceeds to examine the implementation of senior social studies over the first five years of implementation, 2002 to 2006. In

particular, the thesis considers reasons why teachers have expressed differing responses to the implementation of senior social studies. *Personal, contextual and institutional* (Mutch, 2003) factors have both enabled and constrained the implementation experiences of the lead educators and classroom teachers. The following section outlines the subsequent chapters which structure the thesis, and concludes chapter one.

1.6 THE STRUCTURE OF THE THESIS

Chapter Two - *The Research Process: Broadening the Research Focus*. The philosophical underpinnings of the study, the changing research focus, ethical considerations and the procedures adopted in the thesis are explained and justified. The three stages of the evolving research process, the four phases of data collection and the thematic qualitative data analysis methods utilised in the study are described and justified. In addition, five heuristic devices are introduced which together form the theoretical framework which helped make sense of the findings during the analysis and discussion of the data.

The 'storied-approach' of interweaving the literature and data in the succeeding four chapters is also explained. Because the study changed focus and direction in response to the priorities of participating teachers, it is argued that the reader should gain an overall understanding of the scope and sequence of the study as it unfolded. As a result it is argued that the most appropriate way to make sense of the results is for the data and relevant literature to then be interwoven in successive chapters, each with a different but complementary focus.

Chapter Three - *Personal Factors: Dispositions of Contemporary Pioneers*. In this first of the combined data and literature chapters, the personal and professional dispositions of teachers involved in implementing senior social studies during its first five years are considered. The conflicting responses by teachers in the 1950s and 1960s to the early introduction of social studies as a compulsory core subject in the junior secondary school are reflected in the responses of the contemporary

pioneers to the voluntary introduction of social studies in the senior secondary school fifty years later. The strongly historical focus to this chapter provides a backdrop to subsequent chapters. Personal motivations, the sense of self-efficacy and self-definition as social science teachers are reported. In addition, teachers' professional dispositions are considered in relation to the needs of diverse learners, disputing the contention that senior social studies would become a 'dumping ground' for less able students. The trickle effects from junior to senior social studies, especially in relation to curriculum fidelity, are outlined.

Chapter Four - *Contextual Factors I: Teachers' Responses To Social Studies Curriculum Developments Over Time*. The irregular developments of the social studies curriculum in New Zealand provide the context for exploring teachers' conflicting responses to the subject over its sixty year history in this second combined data and literature chapter. Teachers' responses to innovation and change over the decades are summarised using Brain, Reid & Comerford Boyes' (2006) typology. Reasons for teachers' differing responses to social studies curriculum developments include: (i) the poorly strategised integrated nature of social studies; (ii) the on-going 'sibling rivalries' amongst the component social science subjects; (iii) the conceptual nature of the weakly classified social studies curriculum; and (iv) the four traditions which legitimate the subject. Literature outlining curriculum history and educational sociology is foundational to the chapter and provides an illumination of the data.

Chapter Five - *Contextual Factors II: Teachers' Responses to the Evolution of Standards-Based Assessment in Social Studies*. The change from norm-referenced to standards-based assessment over time in New Zealand is documented, especially as it relates to social studies and the social sciences. The opportunities provided to social studies are discussed, such as its late introduction, its potential to contribute to course innovation, the flexibility of the internally-assessed standards and the role of conferencing. Factors which have constrained the implementation of senior social studies include the relatively strong framing of

the achievement standards, concerns that assessment drives programmes, the 'capricious externals' (Hipkins, Conner & Neill, 2006a), the impact of the moderation system and the use of templates for students' work. A typology devised by Karen Dobric (2005) in which educational ideologies are related to qualifications and assessment discourses is utilised to make sense of the differences in teachers' responses to assessment change. The chapter ends by detailing the 'market shares' of social studies achievement standards within the social sciences learning area for the initial five-year implementation period 2002 to 2006. In addition data on social science unit standards over that period is provided.

Chapter Six – *Institutional Factors: The Professional Communities of Practice*. The fourth combined data and literature chapter reports the level of professional support expected and received from the four major institutions which exist to support contemporary teachers in their work. Three of these institutions are state run or funded – the MoE, the NZQA and secondary schools – while the fourth is the voluntary subject association for teachers, ANZFSSA. The roles of each of the four institutions and teachers' conflicting responses to the support received are considered within the conceptual framework of the social-field.

Chapter Seven – *Senior Social Studies at the Crossroads?* This penultimate chapter serves as the discussion in which the various threads of the thesis are synthesised. Each of the four research questions is addressed, briefly reiterating the choice of the question and subheadings, summarising the main literature and key findings. For each of the research questions, the contributions to new knowledge and support for existing knowledge are identified. The five heuristic devices are linked to show their connections as a larger theoretical framework.

Chapter Eight – *The Way Forward*. The final chapter concludes the thesis. It starts by reprising the nature, purpose and main findings of the study. This is followed by an evaluation of the progress of social studies towards subject maturity since

its implementation for the NCEA based on Layton's (1972) three stage model. Next, five recommendations are made for further research and three limitations of the study are identified. The chapter ends with a postscript which describes relevant developments in the field since the end of the data gathering period (2005 - 2006) and the writer's final thoughts.

CHAPTER TWO – THE RESEARCH PROCESS

BROADENING THE RESEARCH FOCUS

2.1 INTRODUCTION TO CHAPTER TWO

In this chapter I describe and justify the decisions I have made in relation to the nature and enactment of the research and to the structure of the thesis. I chronicle the research pathway, describing and explaining the changed or broadening focus of the topic over the whole study period, from 2003 to 2008.

The chapter contributes to the overall thesis by elaborating on the methodological themes outlined in the introductory chapter, thereby further setting the scene for the four chapters which follow. The thesis is written in an arguably less conventional structure, adopting a storied-approach to data presentation in which the data are supported by the literature, thus interweaving the data chapters with the literature review in the four chapters that follow (chapters three to six). Material from these four chapters is synthesised in the discussion chapter (chapter seven), while chapter eight concludes the thesis.

I begin by providing the philosophical underpinnings of the study, locating myself as the researcher within epistemological and methodological paradigms of educational research. The evolving focus of this research study is then described, ethical considerations are discussed and the choices I have made are justified. The research story or journey is then told, with the three stages of the evolving research process described. This justifies the refined focus. The procedures for collecting data in four discrete phases (élite interviews, focus group interviews, postal survey, document and statistical analysis) and for the data analysis are explained. Five frameworks which help to explain the findings in subsequent chapters (Bourdieu's social field theory, Layton's stages towards subject maturity, Brain, Reid & Comerford Boyes' typology of teacher adaptations to educational change, Louden's interests of reflection, and Dobric's typology of assessment ideologies) are then described.

2.2 LOCATION OF SELF IN THE RESEARCH

The field of my study is social studies, a relatively new subject struggling to gain a foothold within an already overcrowded senior curriculum within New Zealand secondary schools. In addition, social studies has since its inception struggled as an integrated subject to carve a unique identity within the social science subjects in secondary schools. The study aims to evaluate the first five years implementation of social studies in the senior secondary school for the NCEA (2002-2006). Senior social studies had its genesis in junior social studies, which in turn has been strongly influenced by the traditional social science subjects, especially geography and history and to a lesser extent economics. Social studies is also strongly underpinned by sociology. Teachers' differing responses to the integrated subject social studies may be ascribed to their allegiance to their academic or university discipline.

The philosophical assumptions which underpin a research study are integral to the research process. These include consideration of epistemological¹ and methodological paradigms. Ideally these should be clarified early in the research process but all too often this clarification occurs at the end (Scott & Usher, 1999). All research is socially constructed and embedded, therefore the role of the researcher cannot be that of a neutral objective bystander. These ideas are now explored in more depth as they concern the present study.

2.2.1 EPISTEMOLOGICAL AND METHODOLOGICAL UNDERPINNINGS OF THIS STUDY

In order to objectively explain social realities, social theorists until the mid 20th century favoured a linear, scientific, rational approach. They utilised observations and precise measurements of social conditions in ways that aimed

¹ Epistemology: "The branch of philosophy that deals with knowledge" (Hawker, 2006, p. 301). Epistemology refers to the "nature of knowledge ... to the difference between knowledge, opinions and beliefs ... to 'how we know what we think we know'" (Scott & Usher, 1999, p. 11).

to objectively explain social theories. This traditional, functional, positivist² approach affirmed the “facticity of the world” (Scott and Usher, 1999, p. 12). Explanation, prediction and control characterised this ‘scientific method’. My academic background in geography in the 1970s introduced me to the scientific method. The positivist approach to the subject at university level has given way to more postmodern³ approaches in recent years, but a positivist approach persists in secondary school geography. Furthermore, geography has long claimed to be a science as well as a social science and was represented in the science as well as the social science learning statements of the *New Zealand Curriculum Framework [NZCF]* (Chalmers, 2005).

Since the 1960s, however, conceptions of social research, of which educational research is one component, have moved away from this functional or positivist approach (Carr & Kemmis, 1986). Influenced by social theorists such as the phenomenologist⁴ Alfred Schutz⁵, more subjective and iterative approaches to educational research have evolved. These approaches include interpretive and critical social science research (Carr & Kemmis, 1986; Fay, 1975; Scott & Usher, 1999).

Critical social scientists have challenged assumptions about logic, probability and rationality. The landmark edited book by Michael Young (1971), *Knowledge and control: New directions for the sociology of education*, in which Basil Bernstein’s writings appeared, arose in response to the functionalism of the positivist approach and sought to increase the level of understanding and meaning within

² Positivism is an approach to social research which seeks to apply the natural science model to investigations of the social world.... the aim is to discover the patterns and regularities ... by using scientific methods (Denscombe, 2003, pp. 299-300).

³ The basic concept [of postmodernism] is that knowledge claims must be set within the conditions of the world today and in the multiple perspectives of class, race, gender, and other group affiliations (Creswell, 1998, p. 79).

⁴ Phenomenology is an approach to social research in which descriptions of how things are experienced firsthand by participants are provided.... dealing with ways people interpret events and, literally, make sense of their experiences (Denscombe, 2003, pp. 97-98).

⁵ Austrian Alfred Schutz died in 1959, but his writings were translated in the early 1970s (Carr & Kemmis, 1986, p. 12).

the sociology of education (Carr & Kemmis, 1986). Such researchers have attempted to delve deeply below the surface of society in order to uncover and examine unequal power relationships. They have tended to be sensitive to equity issues such as race, class, gender, sexuality and environmental concerns, and to ask questions about the wider social and political forces which influence attitudes and behaviours. Exploring issues of equity, social justice, and human rights is also at the heart of good social studies pedagogy, especially as it is conceptualised in the senior secondary school. The hard questions of whose voices are being heard, of recognising the multiple perspectives on social reality, characterise the increasingly critical, question-posing approach being taken to the subject (e.g., Milligan & Beals, 2003; Milligan, 2006). Andrea Milligan and Fiona Beals used the term post-modern to define this approach. This definition is but one of many ways in which this term is utilised.

Between the positivist and critical ends of the continuum is the interpretivist world view (Mutch, 2005). This perspective focuses on understanding, meaning and action (Carr & Kemmis, 1986). The interpretive researcher stands outside the social situation under study and deals with 'action concepts' (Fay, 1975) to describe and interpret behaviours which are central to the research. "The crucial character of social reality is that it possesses an intrinsic meaning structure that is constituted and sustained through the routine interpretive activities of its individual members" (Carr & Kemmis, 1986, p. 84).

In educational research, interpretivist researchers are likely to adopt a phenomenological approach in describing, for example, teachers' experiences of their daily work lives. Interpretivists taking this approach systematically analyse the work of teachers "in order to arrive at understandings and interpretations of how people create and maintain their social worlds" (Mutch, 2005, p. 64). Such researchers interpret the actions, motivations and behaviours of people within a wider social context in order to explain reasons for social actions (Fay, 1975). Social rules provide the criteria for interpreting the actions of the participants in

the research. These social rules have constitutive meanings which underlie social practices (Carr & Kemmis, 1986) including those associated with education – for example, curriculum and assessment procedures as considered in the present study. An interpretivist approach has been utilised by social studies researchers when reviewing curriculum developments through the roles of key people (Aitken, 2005b). In this study, the interpretations of experiences as reported by the early social studies pioneers are used to background the reported experiences of the contemporary pioneers.

A critic of the early post positivist⁶ perspectives, Brian Fay, argued that these approaches were unable to produce valid knowledge in the form of wide ranging generalisations or to provide objective standards of verifying or refuting theoretical accounts. Further, he argued that the interpretive approach, in its quest to explore intentions and meanings, ignored questions about the origins, causes and results of the researched when adopting certain interpretations of their actions and social life (Fay, 1975). These two concerns can still be considered central to the tension between the positivist and post-positivist paradigms. Teachers of history in secondary schools grapple with such tensions, especially in questioning perceptions of historical accuracy and requiring evidence to support interpretations of past events. The variation in responses to the integrated subject social studies by historians and social studies advocates has been ascribed to their differing epistemological positions (Keen, 1979; Sheehan, 2007).

There has been on-going tension in social research amongst the three epistemological positions. This tension revolved around the conflict between the perceived binary opposites of the seemingly ‘ultra-hard’ pure sciences (adopting positivist epistemologies) and the apparently ‘soft’ social sciences (adopting interpretive and socially critical epistemologies) (Scott & Usher, 1999).

⁶ Post-positivism “denies any single and universal set of features qualifying a practice as scientific ... [it] critiques a realist - positivist view of science as oppressive, limiting and untenable” (Scott & Usher, 1999, p. 19).

Methodologies associated with these three positions range from tightly preconfigured to emergent (Creswell, 1998). Quantitative approaches favoured by positivist researchers tend to be hypothetico-deductive (Hayes, 2000), with the original problem or hypothesis as well as the existing theory typically driving the data gathering and analysis in order to prove or disprove the original hypothesis (Mutch, 2005). In contrast, qualitative approaches tend to view social phenomena holistically, and consider that the more complex, interacting and encompassing the narrative, the better the qualitative study (Creswell, 1998, p. 182). Qualitative researchers are more likely to theorise from 'the ground up', as in grounded theory (Corbin & Strauss, 1998; Creswell, 2008). Depending on the world view which underlies the philosophies of the researcher, however, elements of both quantitative and qualitative approaches can usefully be incorporated (Carspecken, 1996).

The more subjective, flexible, iterative approach of qualitative research can be untidy compared with quantitative research. The 'unruly experiences' of undertaking qualitative educational research have been acknowledged by Opie (1994). Elements of both approaches can be adopted (Creswell, 2008) and frequently are (e.g., Meyer, McClure, Walkley & McKenzie, 2006). In essence, both quantitative and qualitative approaches used in social inquiry have similar goals. They are "interested in the same basic thing - social action (and its patterns), subjective experiences and conditions influencing action and experience" (Carspecken, 1996, p. 26). Qualitative analysts tend to pursue these in a less deterministic manner than quantitative analysts (Carspecken, 1996). Both inductive and deductive processes can be at work in qualitative research, with the simultaneous activities of collecting, analysing and writing up the data "involving complex reasoning that is multifaceted and iterative" (Creswell, 1998, p. 182).

2.2.1.1 My personal stance

To be frank, as a novice researcher I fell into the trap cautioned by Scott and Usher (1999) of not clarifying my philosophical position until the end of the fieldwork process. As already mentioned, this can be explained by my strongly positivist academic background in geography, especially in the 1970s, when I completed a quantitative study in agricultural geography for my M.A. (Hons) which included a postal survey of 600 farmers. I experienced considerable tension for some years after entering teacher education in the early 21st century about the legitimacy of qualitative research. Much of that tension revolved around my concerns about the trustworthiness or generalisability (Hall, 1999) of the small sample sizes typical of qualitative research. I finally resolved this tension by adopting the perspectives of research commentators above (Carspecken, 1996; Creswell, 1998; Opie, 1994) whereby I acknowledged the untidy nature of the research but also adopted a mixed method approach to the data gathering by conducting a postal survey at the conclusion of my data gathering period in order to more broadly contextualise my study. This increased the level of generalisability of the research.

My oscillation between the philosophical positions during the study period influenced the methodological perspective consequently adopted as the research progressed. The initial intentions in undertaking the research were critical in that I wished to 'empower' teachers of senior social studies to improve their practice, especially in relation to the values exploration process. The reality fell short of that, however, and this research came to reside more within the interpretive realm as I broadened the focus of the study. Subsequently, I sought to interpret teachers' responses to the implementation of senior social studies as they mediated between the educational policies of the NCEA and its practice while they implemented the subject in this new assessment and qualifications system from 2002 to 2006. Further, the motivations and actions of the participants in the research (classroom teachers, lead educators and members of their professional

communities of practice) were interpreted. The research is therefore clearly socially embedded and constructed.

2.2.1.2 The focus of the literature

It is appropriate that the literature supporting the thesis has adopted a socio-historical perspective. This perspective was adopted by Wendt Samu (1998) in relation to the status of social studies during curriculum developments in New Zealand in the 1990s. The approach considers the evolution of school subjects and their quest for maturity from both a sociological and historical perspective.

The sociology of education, that is consideration of what knowledge is transmitted from generation to generation, how this knowledge is packaged and the relative status of forms of knowledge are all relevant to the thesis. The classification of knowledge as posited by Bernstein (1971, 1996) provides a structure in this study for examining the lowly status of social studies over the decades compared to its more highly prescribed siblings - economics, history and geography. Issues of the differential status of subjects in schools have also been the concern of other educational sociologists (e.g., Goodson, 1988; Goodson & Marsh, 1996; Lawton, 1975; Layton, 1972, O'Neill, 2004; Paechter, 2000), with Layton (1972) providing a framework against which the development of a school subject towards maturity can be measured. Layton's three stage model has been used by commentators to measure the progress of social studies in New Zealand over its history (Barr, 2000; Openshaw & Archer, 1992; Taylor, 2005).

Two other related aspects of the sociology of education are also considered in the present study. The framing of knowledge (Bernstein, 1971, 1996) explains the constraining nature of curriculum and assessment requirements on teachers and students. The imbalance of power and control is a major concern of socially critical researchers, with the locus of control of curriculum and assessment parameters being more likely to reside with those in decision-making positions such as state officials (e.g., MoE, NZQA) and senior management teams in

schools than with classroom teachers. Teachers do, however, have some autonomy and opportunities for creativity within their classrooms. More recently, educational sociologists have considered the pressures on teachers of strongly framed outcomes-based education systems, of which *SSiNZC* and the *NCEA* are examples (e.g., Ball, 2003; Gewirtz, 1997; Neyland, 2007).

Literature pertaining to the historical development of social studies as a compulsory core subject in the junior secondary school in New Zealand, and to a lesser extent in the USA, is also reviewed. The trials and tribulations related by the early social studies pioneers in the 1950s (Meikle, 1994; Openshaw, 1991) are strongly reflected in the stories of the contemporary pioneers fifty years later. My involvement as a social studies educator spans almost four of these decades, starting as a primary teacher in the 1970s, moving into secondary education in the 1980s and 1990s, and tertiary education from 2001. In the latter two decades I have been active at regional and national levels of the social studies professional community, ANZFSSA.

2.2.2 MY ROLE IN THE RESEARCH

The positioning of the researcher involves not just their philosophical assumptions, but also their role within the research. Social science researchers, although observers and interpreters of social activity, are not neutral bystanders for “There are no objective observations, only observations socially situated in the worlds of the observers and the observed” (Denzin & Lincoln, 1998, p. 26). In recent years, it has become increasingly acceptable in qualitative research to declare one’s subjective position by providing a personal biography or ‘genealogy’ (Creswell, 1998; Denzin & Lincoln, 1998; Mutch, 2003; Opie, 1994). Inclusion of one’s genealogy enables the researcher to “... articulate and explore the implications of researchers’ location within their work and the importance of addressing as an integral part of the research the writers’ values, assumptions and ideological perspectives” (Opie, 1994, p. 60). This positioning of the researcher should not, however, dominate or detract from the participants’

accounts in an interpretive study as the latter's data is the most significant to the study.

I am a late career doctoral candidate, with an academic background in geography. As a child living in a number of North and South Island towns and cities, my family travelled widely within New Zealand and I developed a love of place. I have travelled widely overseas in more recent years and developed an increasing concern for social justice and adopted a social democratic, humanistic world view.

My teaching career began in the primary sector then I moved into secondary education. My initial focus on geography gave way to a greater concern for social studies during my time as a head of department [HoD] of social studies & geography at a large urban girls' secondary school throughout the 1990s. While I have not been teaching in a secondary school classroom since the end of 2000, I have been a teacher educator since then, preparing student teachers for senior social studies. I have not, therefore, implemented senior social studies in the classroom though I did attend some of the NCEA social studies training days. I had been involved in the first round of trials for unit standards assessment for geography in 1995, the precursor to achievement standards.

In addition, I had been writing and editing some units of work for senior social studies from late 2002 to early 2003 under contract to UNITEC for the MoE's Te Kete Ipurangi [TKI] website. I have been active in the Manawatu Social Studies Association since serving as its founding president in 1989. In September 2003 I was elected the national president of the social studies subject association, ANZFSSA, which has an advocacy role for the subject and which provides a voluntary professional community of practice for the subject. Whilst holding this role, I was also the conference director for the inaugural combined social sciences conference in Wellington on September 2005, *SocCon2005*. In addition, I held a role as a facilitator for the MoE-funded *New Zealand National Curriculum*

Exemplars Project for social studies [Social Studies Exemplars] (MoE, 2004) in 2002 and 2003. This project created a number of models of good social studies practice for use in primary schools and the junior secondary school.

In the small social studies community, I have therefore been seen as a leader and as someone who nurtures others. I have adopted a humanistic approach which considers growth and empowerment as the road to social fulfilment and sustains links to progressivism and social reconstructionism (Barr, 2000; Dobric, 2005). Social reconstructionism is argued to be the most extreme approach to the citizenship education goals of social studies, whereby students are challenged to not only learn how to function in society, but also to think critically and to consider how to change society in order to build a new and better social order (Barr, 2000; Tanner & Tanner, 2007).

At times during this research I experienced a tension between my role as a nurturer and as a researcher. I cannot therefore claim to be an impartial researcher, and my voice does appear sparingly throughout the thesis where relevant to the argument. In each case I have footnoted my comments to provide their context.

This is not an entirely 'insider analysis', however, as I have not been involved as a lead educator in the implementation of NCEA at a national level nor have I experienced the technicalities of implementing this new assessment and qualifications system for a new subject in the ways that my research participants have. Social studies commentators who have stated that they have been able to provide insider analysis of innovation and change, especially of curriculum, include Jim Lewis (1980) during the 1970s *Social Studies Syllabus Guidelines: Forms 1-4 [Syllabus Guidelines]* (DoE, 1977b) and, more recently writers involved in the contested curriculum developments of *SSiNZC* in the mid 1990s (e.g., Hunter & Keown, 2001). Other commentators could similarly claim to be able to provide

'insider analysis' in the more recent 21st century curriculum developments (e.g., Aitken, 2005a, 2005b, 2006; Cubitt, 2005, 2006).

2.2.3 STYLISTIC APPROACHES

There are two less conventional stylistic approaches adopted in this chapter – writing in the first person and the storied or narrative approach. I have written in the first person for much of this chapter as I believe it is a more effective way of chronicling my research pathway than the use of the third person. While writing in the first person is still regarded as unconventional, educational researchers in New Zealand in recent years have used the first person in parts or all of their theses (e.g., Alison, 2007; Leach, 2000; Vossler, 2006).

This chapter is written in a narrative approach in order to chronicle and justify the changing nature of the research. The intention is to chart the journey, with the 'hiccups' along the way, in a transparent manner. The iterative, perhaps even untidy nature of the research process is not uncommon in qualitative research (Creswell, 1998) because of its inherently "complex, unordered, recursive, contradictory and suppressive" (Opie, 1994, p. 60) nature. I now explain the 'untidy' nature of the study as it unfolded.

2.3 BROADENING MY FOCUS

In this section I outline the evolution of the research from an initially quite narrow focus on the values exploration process at NCEA level one to a broader evaluation of the first five years of implementation in social studies as a whole in the light of teachers' conflicting responses to the innovation. While I could have written the final thesis entirely from the perspective of the latter research focus, I consider that the evolving nature of the research is of interest to other researchers and also that it informs the final 'story'. The evolution of the final thesis can nevertheless be considered as three coherent stages in the research process which resulted in a logically redefined and somewhat broadened focus.

2.3.1 THE ORIGINAL RESEARCH PLAN

As foreshadowed in chapter one, my initial research focus was the values exploration process, one of the three social studies skills processes of *SSiNZC* (MoE, 1997). This process has been considered the most difficult of the three for teachers to implement (Education Review Office [ERO], 2001). Teachers have been accused of imparting knowledge to meet outcomes, or ‘banking’ in Paulo Freire’s terms (O’Neill, 1999) rather than implementing the process in meaningful ways which involve students in the ‘so what?’ question (Hill, 1994; Keown, 1998). The often unanswered ‘so what?’ question provides the link for students between analysing the values positions of themselves and/or others and actually doing something with the information such as taking appropriate social action.

When I began this research, the NCEA assessment tasks in use by teachers for the values exploration process appeared to me to be quite mechanistic, ‘fill in the box’, dispassionate activities which did not require students to reflect on their own values. I had read about values exploration and its links to the values clarification movement in the 1970s, both in the USA (e.g., Fraenkel, 1977; Rath, Harmin & Simon, 1978) and in New Zealand, relating to the introduction of the *Johnson Report* (DoE, 1977a; McGeorge, 2000) following an era of moral panic here. I also explored the links between values inquiry (or exploration) and citizenship education goals in western democracies such as Australia and England in my original research proposal. I postulated that a deeper engagement with the values exploration process could result in students ‘critically affiliating’ (Hill, 1994), that is, making commitments to values positions and effective social action as a result of their values inquiries. I considered that the implementation of social studies in the NCEA from 2002, which included one internally-assessed achievement standard dedicated to the values exploration process at each of the three NCEA levels, provided an opportunity for students to engage in more meaningful values inquiry. This deeper engagement would enable students to transfer their new learning to their everyday lives (Taylor & Atkins, 2005). In my original research proposal in late 2004, the initial title for the thesis was:

*Implementation of the values exploration process in the social studies curriculum:
What are the 'tensions of practice' for senior secondary school teachers?*

The original research questions I developed were:

1. How do teachers conceptualise, define, explain and implement the values exploration process in senior social studies?
2. To what extent do teachers accept and articulate citizenship education goals as the key focus for senior social studies?
3. To what extent does the level one achievement standard AS90218 enable or constrain the assessment of the values exploration process in the way that it was intended?
4. How do senior social studies teachers access support to create new programmes? How do they overcome issues of professional isolation?

To begin to address these questions, in the first phase of the research process, my plan was to conduct elite interviews with a number of lead educators from the social studies community. In addition, I sought to gather data from a planned four day action research cycle with classroom teachers who were offering AS90218 *Examine differing values positions* in their schools. The dataset from the action research would include the teachers' journals kept during students' work on interventions that we had co-constructed, which we would critique at the next action research session and then continue the cycle by co-constructing another intervention.

2.3.2 EMERGING TENSIONS

The second stage of the final research process arose because I began to have doubts about the progress and purpose of the research. A number of 'critical incidents' (Tripp, 1998) started to alert me to the need to reconsider my topic and approach. The first critical incident arose before the data gathering had even commenced. I was discussing the proposed research with a teacher who was very keen to participate in the action research cycle. It was clear that this teacher was looking for professional development, yet I was undertaking research. I

remained aware of this tension throughout the four days of the group action research.

The second critical incident occurred some months later during an élite interview with one of the lead educators. INF3 commented that my research focus on the values exploration process was in fact rather narrow and that values exploration sat within a much wider framework.

During the first two phases of the data gathering my anticipated focus had been strongly on the values exploration process although my questioning in some of the élite interviews became broader than this. During the second of the action research days, however, it became clear that the concerns of the teachers were not so much about the process at level one but concerned more immediate issues such as the low level of support, the interpretation of terms such as the 'perspectives', and especially about their students' results in the externally-assessed achievement standards that would be taken at the end of the school year. In particular, they wished to use their own teaching and learning contexts for co-constructed activities due to time pressures. These concerns caused me to adopt a more collaborative approach in order for us to work together to address their concerns. These tensions together represented the third critical incident.

In March 2006, as I was conducting the seventh and final élite interview, a fourth critical incident confirmed my growing suspicion that the initial focus of the research had indeed been too narrow in order for me to understand how teachers were mediating the requirements of NCEA policy in their classrooms with students. The concerns of the teachers were certainly much broader than just the values exploration process. The quote from INF7 used to commence this thesis (page 1) confirmed for me the need to take an approach that was more evaluative than empowering. Thus the change of focus and therefore research questions occurred between August and October 2005, and was confirmed in March 2006.

I realised that in order to be able to place the concerns of the teachers in a socio-historical context, my research focus was covering much of the crucial first five years of the implementation of social studies for the NCEA. These five years, I now believed, were critical to the success of the subject that was attempting to carve a niche in the overcrowded senior secondary school curriculum. I decided that this needed to be evaluated. The decision caused me to revise my approach to the research project as a whole.

2.3.3 MY REDEFINED APPROACH

By acknowledging the emerging tensions identified in the previous section, the research evolved into its final, redefined state. I realised that teachers were now well through the initial implementation phase for the NCEA, yet there were clearly major problems still facing both the classroom teachers and the lead educators in my study, over and above what could reasonably be considered teething problems. On reflection, I decided that it was more important to evaluate these crucial first five years of the implementation of NCEA social studies in New Zealand secondary schools, than it was to persist with the narrow focus on the implementation of one values exploration achievement standard. My focus remained mostly, but not exclusively, on level one.

The revised research questions for the study became:

1. How have the differing personal and professional dispositions of teachers impacted on the implementation of senior social studies?
2. How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?
3. How has the introduction of standards-based assessment enabled and constrained the implementation of senior social studies?
4. To what extent have the professional communities of practice supported teachers in their implementation of senior social studies?

These questions better reflected the revised focus and approach of the study than those originally developed to examine the values exploration process. The final version of the thesis therefore provides an evaluation of the first five years of the implementation of social studies, 2002 to 2006. I decided to pursue a broader range of responses and greater level of generalisability (Hall, 1999) from my participants to teachers of NCEA social studies across the country by adding two more phases to the data gathering. These comprised a postal survey (phase three) which was conducted late in the data collection period, and the collection of statistical information from the NZQA and material from ANZFSSA records (phase four). The four phases of the research will be described in more detail in section 2.5 of this chapter.

2.4 ETHICAL CONSIDERATIONS

I addressed ethical issues, especially that of doing least harm to research participants, as sensitively as I could. Formal ethical procedures required by Massey University were followed. The screening process confirmed the research to be low risk in accordance with Massey University Human Ethics guidelines. Ethics approval was granted by the College of Education Ethics Committee on 22 February 2005, identified as COE05/001.

Three philosophical traditions underpin the role of ethics in research. These comprise the principle of respect for persons which is operationalised by seeking informed consent from research participants; the principle of beneficence actioned by aiming to maximise the benefits and minimise harm to participants; and the principle of justice through equitable distribution of the burdens and benefits of research (adapted from Pritchard, 2001). Each of these is considered, below.

2.3.4 RESPECT FOR PERSONS

The first tradition, that of informed consent, was addressed in two ways. Once the participants committed to the research we engaged in conversations about

the nature of the research and their role in the process, either electronically or in person. This was especially the case with the lead educators who were approached directly (section 2.5.1). The second method of gaining informed consent was to ask the lead educators and focus group teachers to sign a standard informed consent form which they all did. All had been provided with an information sheet which outlined the purpose and nature of the research (e.g., Appendix B). The primary purpose of these forms is to alert participants 'to their rights during the research process' (Creswell, 2008) by providing sufficient information about the research to enable participants to establish 'informed consent'. The question of how 'informed' informed consent may truly be, however, was raised by Annette Street (1998) who noted that the power balance generally resides with the researcher. I checked verbally with participants in the focus group (phase two) that they wished to remain in the study.

2.4.2 BENEFICENCE

The second tradition of maximising benefit and minimising harm was also addressed in this study. Researchers are required to consider moral issues and "conduct their investigations within a framework of ethical deliberation" (Clark, 1997, p. 151). John Clark distinguished between teleological and deontological moral theories – the former placing great weight on the consequences of action whereas the latter "either ignore or downplay the consequences of an act in determining its moral worth" (p. 153). I was guided by teleological theories especially in wishing to maintain the confidentiality of the participants in the small subject community so that no repercussions would occur for them in expressing their views in my research.

I faced the most difficulty in attempting to maintain the confidentiality of my action research focus group teachers. We met at Massey University College of Education, initially in the staff room for a coffee at a time when few staff were present and then went to a board room or a classroom for the rest of the day. I took the teachers off campus for lunch to promote confidentiality. They were less

concerned about this than I, and by the last day we decided to eat in the college cafeteria. Although at least one of the teachers was recognised by people there, this was not an issue for him.

I did not use identifiers on the postal questionnaires because I wanted to maintain anonymity there also. That proved a problem, however, when I went to send out the follow-up questionnaires. Some teachers had written extra notes and identified themselves so they did not receive a follow up. For all the other second mail-outs, I enclosed a covering letter thanking teachers if they had already responded to the questionnaire.

The group most at risk of being identified in the research are the lead educators due to the small size of the social studies community, with their 'voices' likely to be identifiable in the narrative. I have done my best to minimise this in stages. After the interviews, the lead teachers were sent their transcripts and asked to identify any components they did not wish to be used in the final document, which I attended to at the data analysis stage. Then, after completing the penultimate draft of the thesis, I provided it to the lead educators for final comment on their interpretations as well as extracts selected from their transcripts.

Some of the ideas and information gained during the elite interviews were used to stimulate discussion during the action research focus group interviews or in questions with subsequent elite interviews. Conversely, I raised some of the classroom teachers' concerns with appropriate lead educators. This social-constructivist approach when used in research, termed 'intersubjectivity' (Kincheloe, 2003), occurs when data from one source of the data gathering is used within following interviews or discussions with other participants. As much as possible, the source of the idea or concern was kept confidential.

Another measure to restrict identifiability was to provide codes for the participants according to the phase they were involved in (i.e., informants, participants and respondents). I also turned off the tape recorder when requested during the elite and focus group interviews. The component of the second tradition – that of minimising potential harm to participants in the research – was the most difficult to achieve in my experience.

2.4.3 JUSTICE

The third tradition of research ethics addresses the equitable distribution of the burdens and benefits of the research. My dual allegiance as a member of the social studies community and as a researcher did pose some tensions for me as already described. One concern was that some of the teachers may have opted for the group research, and lead educators may have agreed to be interviewed, because they knew me personally and may have felt under some obligation to become involved. This may have been burdensome to them in terms of the time involved away from their teaching and other roles. I considered involving the classroom teachers in the writing of future publications but did not pursue this for a number of reasons, mostly to do with the ‘busy-ness’ of the participants’ work lives (Street, 1998).

The story now turns to a sequential account of the research process.

2.5 THE RESEARCH PROCESS

Having discussed the major methodological issues posed by the study and my practical response to these, this section considers the methods for collecting, analysing and presenting the data, as well as justifying the approaches taken.

2.5.1 COLLECTING THE DATA

The majority of the data were gathered over a two year period, during 2005 and 2006. There were three major phases of data collection as well as a shorter fourth

phase. Table 1 below summarises the four phases of data gathering and the associated methods which are then described.

TABLE 1: DATA GATHERING PHASES, SOURCES, METHODS & TIME FRAME

Data Gathering Phase	Source of Data	Method of Collection	Time Frame
Phase One	Élite interviews	One semi-structured pilot interview over three sessions Six semi structured interviews	INF 1: March- April 2005 INF 2 & 3: July 2005 INF 4: Sept 2005 INF 5: Nov 2005 INF 6: February 2006 INF 7: March 2006
Phase Two	Focus group	Four days - initially action research, then semi structured group interviews & discussion, four teachers	Day 1: 16 May 2005 Day 2: 12 August 2005 Day 3: 14 October 2005 Day 4: 29 May 2006
Phase Three	Postal Survey	Questionnaire - 45 teachers representing 35 schools (38 schools responded but three were nil/incomplete returns - Appendix H)	First posting: 10 October 2006 Second posting: 29 November 2006
Phase Four	Statistics NZQA Documents ANZFSSA	Statistical & document analysis	NZQA: April 2007 ANZFSSA: 2007-2008

2.5.1.1 Phase One - The Élite Interviews

I commenced my data collection with three in-depth interviews with one teacher of levels one to three social studies (Appendix C). This substituted as a 'pilot' for the main study by focusing on the original research questions. I wanted to work in-depth with this particular teacher for a number of reasons. She had implemented senior social studies progressively to all three levels in her school commencing from the first year of the NCEA introduction, 2002. She had taught a number of subjects and was very proactive and receptive to change. Only one teacher was interviewed in the pilot because she was geographically accessible

and was the only person in the region offering senior social studies to all three NCEA levels at that time.

These initial interviews occurred over the space of four weeks from late March to early April 2005 in a meeting room at the informant's school. Two of the interviews occurred during her double non-contact periods and one during term holidays. I regarded this series of interviews as the "reconnaissance phase or test-site" (Denscombe, 2003, p. 33) for the research questions. These questions arose from my initial literature review and were articulated in my research proposal. I regarded this series of interviews as a pilot study before commencing phase two of the study, that is the planned action research cycles.

The three interviews which formed the pilot study were semi-structured (Drever, 1995) and linked closely to the four original research questions (section 2.3.1). The questions (Appendix D) were emailed to the teacher several days ahead of each scheduled interview and she voluntarily spent some time beforehand writing responses to the questions which she then passed on to me at the completion of the interview. She regarded this as 'doing her homework' and effective professional development. Her answers were honest and frank and revealed new insights as well as confirming or denying some of my original ideas. In particular, she had a strong sense of confidence in implementing the values exploration process and a commitment to citizenship education goals. She had overcome the professional isolation she had initially experienced as the sole teacher of senior social studies by developing her own networks and had developed a high level of self confidence. Despite the semi-structured interview format and the audio-taping of the interviews, this teacher was able to tell her story and we were able to engage in considerable dialogue. I was very appreciative of her giving up precious non-contact time during her busy week. She reported several times that she very much valued the time spent reflecting on her practice during the interviews, which she considered had provided her with excellent professional development. For example, after the second session she

reflected “I thoroughly enjoyed it. It’s just made me question what I am doing and almost justify to myself what I am doing” (INF1, 06.04.05).

I also conducted elite interviews with six other key members of the small social studies community during phase one. These were conducted over a period of one year (Table 1). These interviews were intended to build upon aspects of the initial four research questions covered in the pilot interviews. This was a ‘purposive sample’ (Davidson & Tolich, 2003) of elite educators, many of whom held significant national roles in the implementation of senior social studies. The roles of these seven informants, which included the pilot study, encompassed classroom teachers, teacher educators, advisers, markers, moderators, researchers, a National Assessment Panellist, Beacon Schools’ Coordinators, an Expert Panellist, NCEA examiners and academics with expertise in values education. Several of the informants held more than one of these significant roles. Six of these seven people I contacted directly because of their roles at a national level. I contacted two other lead educators who did not wish to take part in the research. One declined to be interviewed because she considered that it would represent a conflict of interest for her. Another person was happy to talk ‘off the record’ but not to be formally interviewed.

The six elite interviews that followed the initial pilot study were conducted in a less structured and comprehensive manner. There were a number of reasons for this modified approach. I was generally focusing on one or two of the research questions, rather than all four, depending upon the area of interest and expertise of each interviewee. By now, I had become more confident with the interview process and I was very interested in their stories and opinions. Most sessions were more of a dialogue and one was described by the interviewee as a conversation. I was anxious to listen to what these experts had to say and to report their narratives, and those of the focus group teachers, faithfully. This “determination to give ‘voice’ to the priorities and concerns of practitioners ...

after all, 'how else can we get inside their heads?'" (O'Neill, 2000, p. 21) was paramount.

The term 'élite interviews' implies an imbalance of power. The lead educators comprised a group of people who had risen to national positions of authority within the community and were therefore more likely to exude "confidence, power, and ownership" (Mutch, 2006, p. 183). Two of these lead educators were still practising classroom teachers at the time of the interviews but also held national roles. On the other hand, the classroom teachers in phase two and three of the research did not hold generally hold national roles other than as members of the Beacon Schools' Project [Beacons]⁷. One teacher held a national role in his other senior subject which provided him with greater insights into the implementation of senior social studies.

Phase one of the data collection therefore commenced with the pilot study which was underpinned by a positivist philosophy, highly deductive, reflecting my hesitations as a novice researcher and my previous quantitative background. As the élite interviews progressed, my increasing confidence enabled me to pursue the data gathering in a less preconfigured and deterministic manner.

2.5.1.2 Phase Two - Evolving Group Research

The structure of the second phase of the data gathering, a planned series of four action research days, was based on the findings of the pilot study. Information about issues and problems that had arisen out of the literature - the unclear definitions of terms, the perception of the values exploration process as problematic, the role of citizenship education in social studies, issues surrounding the introduction of standards-based assessment and the challenges of professional isolation - had all been gathered during the pilot study. During each of the four action research days, I planned to work with a small group of

⁷ A Ministry of Education professional development initiative to develop expertise amongst ten teachers of levels two and three social studies during 2004-2006. This was provided for subjects that had not previously been assessed for national qualifications (Hipkins, Conner & Neill, 2006a).

classroom teachers who were engaged with level one social studies to reflect upon meanings, interpretations, and issues about the values exploration process. Based on their concerns and interests in teaching values exploration, we would then co-construct an intervention such as a values exploration assessment activity that the teachers would trial with their students. In order to provide some data for further dialogue, the teachers would keep a log during the trial of the activity, which would become the basis of discussion at the next session from which a new activity or intervention would be co-constructed.

Action research is a qualitative social research methodology. The methodology has been utilised by teacher researchers to effect some kind of educational change since it was introduced by Kurt Lewin in 1946 (Cardno, 2003; Carr & Kemmis, 1986; Shacklock & Smyth, 1998). Collaborative action research, according to Lewin, brings together action and reflection to make improvements, foster learning and develop both the individual and the institution (Carr & Kemmis, 1986). Action research can be deceptive. It has become a “phenomenon that is paradoxically simple yet complex ... its strength lies in its aim to investigate *and* to improve” (Cardno, 2003, p. vii). In terms of process, action research involves participants in a cycle of planning, acting, observing, reflecting, with the cycle being repeated on a number of occasions in a spiral fashion as new insights emerge through inquiry. Ideally the teachers collaborate to decide the change desired and negotiate the means to effect this change through the action research cycle.

The intention of the action research proposed for this study was that a clearer understanding of the values exploration process would be gained by the teachers and ultimately their students, with students being empowered to critically affiliate to some of the values analysed and to take effective, appropriate social action. This critical reflection would also empower the teachers in their senior social studies programmes, therefore the research would achieve an emancipatory purpose. The emancipatory goals were maintained when the focus

of the study was broadened. Truly emancipatory (or socially critical) action research, however, relies upon the group coming together to negotiate the problem to be addressed and the goals to be achieved (Kemmis & McTaggart, 1988). This research had four classroom teachers who came into the research from different schools in response to a request to be part of a study about the values exploration process at NCEA level one. The original intention was, therefore, a qualified form of emancipatory or critical action research.

I obtained participants for the four action research days in a systematic way. Firstly I wrote a letter with a faxback return to 98 principals of secondary schools in the lower North Island, within a three hour driving radius of Palmerston North (Appendix E). Principals were asked if senior social studies was offered in their school, and if so, could I have permission to approach their HoD of social sciences. In hindsight, I should have approached the NZQA for names and addresses of the schools which had students entered in AS90218 (which I did for the third phase of data gathering) as this would have reduced the number of letters sent out. Fifty-five principals faxed back to say that their schools did not offer senior social studies. Another nine replied that their schools did offer senior social studies and gave me permission to approach their HoD. The next step involved me writing to each of the nine HoDs asking them to pass on my letter to the teacher who was currently offering the NCEA values exploration AS 90218 to his/her level one students (Appendix F). This represented a response rate of 65%, that is 64 of the original 98 letters sent out.

From these nine schools who were offering NCEA level one social studies, four teachers agreed to be part of the study. All but one of the remaining five HoDs expressed a keen interest in taking part in the research but did not feel they could afford the time to take the required four days out of school. Two offered to help in a more minor role.

Initially I was disappointed to have a small number in the action research group, as I had hoped for six to eight teachers. The four teachers did, however, represent a range of school types and of experience in teaching senior social studies. One was from a rural secondary school, while the other three were from urban schools. One represented a single sex school, another a special character school. The schools' decile ratings ranged from five to ten. One of the teachers was substituting for his HoD who was on study leave, while two were HoDs of varying years of experience.

The first action research day occurred on 16 May 2005. The participants displayed differing levels of experience and confidence in implementing level one social studies. From the beginning, it was quite clear to me that the concerns I was interested in pursuing related to the implementation of the values exploration process were not the imperatives of the four teachers themselves. Their interests and concerns were quite specific, often relatively 'technical' (Louden, 1991), and for at least two of the participants the concerns likely reflected the lack of a mentor or adviser in their region. In fact, as noted earlier, a tension had arisen for me between being a researcher not an adviser when I went to meet with one of the participants before the research commenced.

From the beginning, the dynamics of this group were interesting. Quite quickly, one person took more of a leadership role and it was apparent that the others fully respected his views and expertise. Another was very supportive of my role, contributing enthusiastically and asking questions of clarification of the values exploration process. Another was very quiet and considered whilst making a worthwhile contribution, while the fourth and least experienced teacher contributed when asked but tended to take a more passive role. All were keen for support and guidance which further fuelled my personal tension between my role as a researcher and that of nurturing, leadership or guidance. I resolved this by inviting in a local expert⁸ in senior social studies for a period of time during

⁸ Termed PAR5.

days two and four to provide guidance and answer the teachers' questions. I did this having negotiated with the teachers who subsequently reported that they valued the expert advice and guidance.

The activity the teachers and I co-constructed the first afternoon was based around a current issue in the media at that time – that of the impending trial of Schapelle Corby, an Australian national being tried in Indonesia for alleged drug smuggling. We elevated this 'hot lava' topic (Florio-Ruane & Raphael, 2001) from a 'gossip' topic to a social-justice issue based on the question "Does the government of one country have the right to intervene in the judicial processes of another country?" The teachers went away with some ideas for creating teaching activities and an assessment activity around this issue to trial before our next session.

At the second action research day, the participants discussed the work they had done with their students. Three of the four teachers had spent two or three class periods on the issue, while the fourth had spent two weeks and written a very sophisticated and innovative NCEA-style AS90219 social decision making activity on it (Appendix L).

Once again, through these discussions and presentations I was aware that my objectives as a researcher were not the same as the teachers' day-to-day concerns. A significant example was the wrath directed at one teacher by a new immigrant parent who considered that there were much more significant global issues that her daughter should be studying. The teachers were generally concerned about the meanings of the terms used in the values exploration process and contexts to be considered for AS90218, but not so concerned whether their students internalised values discussed in class and transferred them to other situations in their lives, or took social action as a result of their values inquiries. Considerable discussion ensued, but when it came time to co-construct the second activity, the

teachers asked that they select their own context rather than a shared context that all would work on due to time constraints with their programmes.

It was becoming increasingly apparent to me that the action research component was not working the way I had intended or planned it for a number of reasons. Two of these were my not realising how genuinely complex this seemingly simple action research method was as Cardno (2003) warned and in not negotiating the problem to be resolved with the participating teachers. Another possible reason was that the teachers had more pressing concerns that were wider than just the values exploration process. They had already planned their programmes and assessments in advance with little time for deviation from the plan. The teachers were reluctant to pursue issues which were personal to students' lives (McGeorge, 2000), preferring 'safer' issues such as human rights and social justice issues on a national or global scale. In addition, while two of the teachers were concerned with issues of clarification of terms and other implementation issues, they perceived this internally-assessed level one achievement standard to be relatively straightforward compared with the externally-assessed achievement standards.

Was 'action research' the right approach with these teachers, then? A 'failed' interview with Pasifika students in a New Zealand secondary school taught a group of researchers a great deal about the theory and practice of qualitative research and "the tenuous nature of the production of knowledge" (Nairn, Munro & Smith, 2005, p. 221). They argued that an apparent failure might be an effective prompt for researchers to consider in order to question what counts as data and "to be reflexive about who we are in relation to those whom we study" (Pillow, 2003, & Reinharz, 1994, cited in Nairn et al, 2005, p. 222). The discomfort and recuperation experienced and reported by these researchers mirrored my own concerns about the 'failed' action research.

Approaches to action research range from technical, through to practical and critical (Mutch, 2005). The critical approach has an emancipatory component and ideally occurs when the research problem is raised by a group of teachers who work together and wish to solve the problem together. Whatever else happens, the researcher “in socially critical research should deliberately set out to ensure that the situation and its outcomes are just for all participants” (Tripp, 1998, p. 42). Criteria established by Tripp to “establish and maintain justice” based on the literature were:

- (i) that there is a shared commitment to the necessity of the research;
- (ii) that the research agenda concerns topics of mutual concern;
- (iii) that control over the research process is equally shared;
- (iv) that outcomes are of equal value to all participants in professional terms;
- (v) that fairness informs matters of justice amongst participants (p. 42).

In this case, the teachers had responded to my request to participate in the research on the basis of the information provided in the information sheet which is required in ethics proposals (Appendix B). The criteria summarised by David Tripp were difficult to fully address for a number of reasons. A dilemma confronts researchers wishing to use critical action research with teachers from a range of schools in that the information sent to schools needs to be quite clear what the research is to be about. The parameters are, in a sense, set before the research begins. This preconfiguring of the research has the potential to preclude emergent research designs because busy classroom teachers may be unwilling to be away from their classes for extended periods of time if the rationale and perceived benefits of the research are not clear from the outset. In addition, the teachers did not necessarily know each other. Critical action research would therefore seem to be more suited to an emergent approach initiated by a group of teachers with a problem or concern they wish to solve

within their teaching environment⁹. On reflection, even though my original aspirations were emancipatory, a more pertinent description of my action research would be technical or practical action research. The latter are determined by the researcher and presented to participants who have not themselves identified a need nor initiated the research process.

As a result of these tensions, over the course of the four days, the group arguably evolved into something more like a reflective focus group. Focus groups:

... essentially involve an intensive group discussion 'focussed' around particular issues ... [they] are usually non-quantitative in nature and provide a powerful means for gaining an insight into the opinions, beliefs and values of a particular segment of the population ... their strength lies in the relative freedom that the group provides participants to discuss issues and reflect on problems ... as well as to 'bounce' ideas off one another. (Waldegrave, 2003, p. 251)

Our meetings certainly involved lots of bouncing of ideas, with the teachers continuing to delve into issues which concerned them. In addition, discussion centred around the recently released discussion paper by Bronwyn Wood (2005) on the role of the perspectives within the values exploration process and later *Guide Notes on the Perspectives* (MoE, 2006). This latter document was written following research by the MoE with teachers and lead educators which revealed a worrying lack of clarity about the terms used in the values exploration process. The dissemination of this important publication is discussed further in chapter six.

The final day with the four teachers in late May 2006 completed the cycle. One of the participants emailed me to say that he had 'REALLY ENJOYED' the days and that in 2005 my group was his sole professional development for senior social studies. I began to consider the teachers' narratives I had heard during the four days of the focus group and also during the elite interviews in terms of 'tensions' experienced by these teachers. I realised that there were many other teachers 'out

⁹ Towards the later phase of the Beacon Schools Project, Beacons teachers were required by the Ministry of Education to undertake an action research project within their schools to improve an aspect of their practice.

there' whose voices also needed to be heard and I wanted to 'test' the major themes that had emerged in my summaries of tensions identified in the research to date. I considered that my sample had been quite small and I was concerned about the generalisability (Hall, 1999) of data collected thus far if the research findings were to be claimed to be representative of the experiences of senior social studies teachers throughout the country. As a consequence I initiated phase three of the data gathering (section 2.5.1.3).

On reflection, phase two of the data gathering was the most emergent of the data gathering phases and enabled the greatest level of interpretation due to the greater depth of the data gathered over the longer time period. Qualitative research uses multiple methods that are "interactive and humanistic, encouraging active participation by participants and sensitivity towards them ... the data collection process might change" (Creswell, 1998, p. 181). While the initial intent of the action research cycle in phase two had been critical, in that my goal was to 'empower' teachers of AS90218, the outcomes were realistically more interpretive of their concerns than critical in terms of helping them to deeply understand and radically alter their classroom practice for the better. Nevertheless, discussions about the professional communities of practice which they felt should have been supporting their 'pioneering' work did contain an element of critical social science insofar as we discussed their concerns about power and control of senior social studies, especially in terms of information sharing with and among teachers.

The focus now turns to the more quantitative approach which provided a wider context for the study.

2.5.1.3 Phase Three - The Postal Survey

In response to my emerging concerns expressed above and the redefined nature of the research, I devised a postal survey to further investigate a number of the initial tensions identified (Appendix G). This represented, as it were, a swing

back to my quantitative, positivist academic traditions. The survey questions derived from both the original and revised research questions (Appendix G). The use of “multiple methods of data gathering to explore the same phenomena” (Hayes, 2000, p. 135) would provide the ‘triangulation’ of data that I had originally anticipated would be provided by the teachers’ reflective journals in the early phase of the action research. They did reflect on the two trial activities, but I have not used in the final analysis because the enactment of the values exploration process is no longer the key focus of the study.

The advantage of postal surveys is that they can be used to collect relatively straightforward facts and/or opinions in a consistent way from a wider geographic spread at a relatively low cost. The major disadvantages are the time it can take for the surveys to be returned, the typically low response rates yielded and the inability of researchers to have opportunities to seek further clarification (Bartley, 2003). Due to its ‘one-off nature’ (Denscombe, 2003) it was important to get the questionnaire right if it were to be read and completed by busy teachers, so I enlisted the help of a colleague researcher with expertise in the area and, also, piloted the questionnaire.

The questionnaire was restricted to four pages of mostly short answer questions and Likert Scales¹⁰ so that teachers would not perceive it to be too time consuming. Questions ranged from closed to very open. Space was provided for additional, voluntary comments for several of the questions, which were grouped around the themes of the original research questions and tensions that I had already identified from the first two phases of the research.

I posted the questionnaire to 67 HoDs social science nationally, those whose schools had entered more than ten students in AS90218 in 2005 and/or 2006. Data providing the names of schools and numbers of students entered AS90218

¹⁰ A Likert Scale is a rating scale with theoretically equal intervals among responses, typically from strongly agree to strongly disagree (Creswell, 1998, p. 176).

was provided to me by an official at the NZQA for my research purposes only. If the data showed that large numbers of students were entered, that is more than one class, I sent more than one questionnaire to the school. My covering letter requested that each teacher of AS90218 filled in a questionnaire because some of the questions were teacher-specific whereas other questions were school-specific. The questionnaires were posted in late October with a follow-up letter and questionnaire in late November. In all, of the original 67 letters sent out, 38 schools (45 individual teachers) responded, a 57% response rate. Three of the 38 schools who replied had nil or incomplete responses – that is, they were no longer offering AS90218 or offered it as part of a mixed course so they did not complete the questionnaire (Appendix H). Seven of the responses were as the result of the follow-up mail out. I had considered that the latter part of the year might be a suitable time for teachers as their senior students would have left for the external examinations but this was not borne out in practice.

The data gathered during this phase did provide a degree of generalisability of the emergent findings of the earlier phases. This in turn justified the decision to redefine the focus of the research, to evaluate the initial five years implementation of social studies for the NCEA. A further layer of context was added by seeking material from the NZQA and ANZFSSA.

2.5.1.4 Phase Four – Other Sources of Information

As part of this broader, redefined focus for the research I also sought other sources of information on the implementation process. In addition to interviewing participants individually and in groups, in person and by post, I wrote to the NZQA in March 2007 to request data on the numbers of entries and results of social studies achievement standards over the period 2002 to 2006, as well as of other social science achievement and unit standards. The information for the latter was from 2000 to acknowledge the longer history of unit standards and to consider the impact of the NCEA in 2002 on their uptake.

I also had access to documents from ANZFSSA. Although these ANZFSSA documents did not provide a consistent record over two decades, they were very detailed during certain periods that shed light on the recent history of social studies, especially the era of curriculum contestation in the mid to late 1990s.

Further, my on-going engagement in the social studies community, professional conversations with key people in the community and involvement in the Curriculum Marautanga Project [CMP]¹¹ provided a constant source of topical information. This provided another tension for me as a researcher because I had access to it as a participant, not as a researcher. I have included this anecdotal data sparingly, aware of the bias it might provide. Where such material is utilised, I have either provided footnotes or the information resides in the postscript (chapter eight, section 8.7). Where material is included, I have regarded it as essential to the background or the argument.

The discussion now turns to the identification and justification of the methods chosen to analyse the data gathered during the study.

2.5.2 ANALYSING THE DATA

At its most fundamental level, data analysis involves the reduction, organisation and interpretation of the data in relation to the original research questions. Put simply, data analysis involves “searching for patterns and regularities in the data collected” (Davidson & Tolich, 2003, p. 154).

In order to make sense of the data, I initially identified ‘tensions of practice’ reported by the lead educators and focus group teachers during the first two phases of the research and refined these tensions (Table 2). I believed that I had a very strong familiarity with and feel for my data because I had edited all of the transcripts as well as transcribed some of the focus group interviews. I began to

¹¹ A Ministry of Education Project undertaken from 2003 to 2006 on the recommendation of the *New Zealand Curriculum Stocktake Report* (MoE, 2002).

highlight the transcripts using highlighters, pink for constraints and green for opportunities. It was apparent that there were a number of factors which were constraining the successful implementation of senior social studies, as well as a number which had opened up or were continuing to open up opportunities. These factors that were enabling and constraining the successful implementation of senior social studies tended to fall within six main descriptors - *dispositional, institutional, curriculum, assessment, professional, and organisational*.

I then identified a number of themes that were relevant to both the enabling and constraining factors. An iterative approach of identifying themes and sub-themes occurred. Transcripts were covered with stickies, and highlighted, cards were made and eventually the transcripts were physically cut up. The cut sections of transcript were then put into envelopes and numbered according to whether they represented 'opportunities' or 'constraints'. Definitions and descriptors were written for each of the themes. Within each of these opportunity-constraint binaries, there were approximately 26 themes, later condensed to 18. Eventually, these were classified under three major themes, initially based on Roger Openshaw's (1996/97) *historical, philosophical and organisational/structural* issues then later on Carol Mutch's (2003) three story strands - *personal, contextual and institutional*.

The changing themes over time are identified in Table 2, overleaf.

TABLE 2: CHANGING THEMES IN THE DATA ANALYSIS

Initial Tensions 24 April 2005	Initial Tensions Refined 20 July 2005	Themes 14 February 2006 NVivo2 codes	Themes 20 June 2006	Draft One Themes 25 July 2007	Draft Two Themes 4 February 2008
<ol style="list-style-type: none"> 1. Citizenship education goals – senior social studies privileges those most likely to be responsible citizens. 2. VEP should result in social action. 3. Assessment – variations in students’ level of ability to articulate values positions in written examinations; 4. Assessment – variations in the moderation system; 5. Professional development spasmodic, flawed and inadequate. 	<ol style="list-style-type: none"> 1. Unclear definitions of terms related to VEP 2. Teachers not aware of background to VEP. 3. Separation of the three processes for assessment. 4. Disparity between curriculum and assessment requirements. 5. The manageability of assessment tasks for less literate students. 6. Can/should teachers be assessing students’ ability to analyse and reflect on their own values? 	<ol style="list-style-type: none"> 1. Citizenship education - <ul style="list-style-type: none"> - definitions - empowerment - social activism - “hot lava” topics - prescriptiveness - conceptual understanding 2. VEP <ul style="list-style-type: none"> - definitions - perspectives - values clarification - the role of empathy - values relativism - moral values 3. Assessment – <ul style="list-style-type: none"> - assess values? - writing the achievement standards; - consistency between assessment and curriculum; - assessment as the driver? - assess students’ own values 	<ol style="list-style-type: none"> 1. Communities of practice – <ul style="list-style-type: none"> MOE lead teachers beacons others inner/outer circle; online resources advisers isolation; NZQA writing moderating reporting; Schools isolation trickle effects other social sciences status; Future 2. VEP <ul style="list-style-type: none"> values education – derivation implementation perspectives empathy 3. Citizenship education goals <ul style="list-style-type: none"> valid goal? articulation 	<ol style="list-style-type: none"> 1. Personal aspirations – <ul style="list-style-type: none"> Dispositional qualities - missionary zeal - teacher self-efficacy - teacher self-definition Professional <ul style="list-style-type: none"> - diverse learners - trickle effects 2. Contextual Factors – <ol style="list-style-type: none"> a. Curriculum – <ul style="list-style-type: none"> teachers’ responses to: <ul style="list-style-type: none"> - citizenship education goals - lack of prescription - VEP b. Teaching & Learning – <ul style="list-style-type: none"> - pedagogical approaches - contexts - teachers as social activists c. Assessment – <ul style="list-style-type: none"> - assessing the affective domain - use of templates 	<ol style="list-style-type: none"> 1. Personal dispositions: <ul style="list-style-type: none"> - missionary zeal of contemporary pioneers - teacher self-efficacy - teacher self-definition Professional dispositions: <ul style="list-style-type: none"> - diverse learners - trickle effects 2. Contextual Factors 1: <ul style="list-style-type: none"> - an integrated curriculum - on-going sibling rivalry - social studies traditions - teachers’ responses to social studies curriculum developments 3. Contextual Factors 2: <ul style="list-style-type: none"> - move from norm-referenced to SBA - the introduction of NCEA - assessment as driver - SBA in social studies

		<p>4. Professional development & support -</p> <ul style="list-style-type: none"> - professional isolation - moderation process; - Beacons Project – spreading the light of good practice; - trickle effects - status of social studies - name change needed - links with other social sciences; - PD for the future <p>5. Key players -</p> <ul style="list-style-type: none"> - Teachers - MOE - NZQA - Self as researcher 	<p>definitions empowerment hot lava topics teacher or social activist? conceptual understanding;</p> <p>4. Standards-based assessment assess values? students' values enable/constrain goals assessment as driver templating</p>	<ul style="list-style-type: none"> - assessment as driver. <p>3. Institutional Support:</p> <p>a. <i>MOE:</i></p> <ul style="list-style-type: none"> - professional development - beacon schools <p>b. <i>NZQA:</i> Moderation process Dissemination of information</p> <p>c. <i>Schools</i> -</p> <ul style="list-style-type: none"> - senior management teams - social science departments <p>d. <i>ANZFSSA.</i></p>	<ul style="list-style-type: none"> - assessing the affective domain - templating - conferencing - current position of social studies in relation to other social sciences <p>4. Institutional Factors</p> <ul style="list-style-type: none"> - Ministry of Education - New Zealand Qualifications Authority - Schools - ANZFSSA
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1. Professional development moved to the top of the list by February 2006.
2. The term key players began to be used by that date as well.
3. Abbreviations used in this table but not in the remainder of the thesis:
 - SBA – standards-based assessment
 - VEP - values exploration process

The iterative approach of establishing themes and sub-themes, involving a constant interplay between data and themes, is a feature of thematic qualitative analysis. The approach is frequently used in social science research, for example in psychology and education (Hayes, 1997, 2000; Morse, 1994; Mutch, 2006). According to Hayes (2000):

The steps involved in thematic qualitative analysis are:

1. Prepare the data for analysis – transcribe interviews.
 2. Read through each interview, noting items of interest.
 3. Sort items of interest into proto-themes.
 4. Examine proto-themes and attempt an initial definition.
 5. Take each theme separately and re-examine each transcript carefully for relevant material for that theme.
 6. Using all of the material relating to each theme, construct each theme's final form – name, definition and supporting data.
 7. Select the relevant illustrative data for the reporting of that theme.
- (p. 78)

Thematic qualitative analysis is a form of content analysis with more flexibility built into the iterative process than is the case with more formal content analysis. Formal content analysis “involves interpreting people’s attitudes, values, and behaviour from the content of texts ... which generally involves recording how often words or concepts are used” (Shuker, 2003, p. 347). This method emphasises the frequency of use of key concepts and therefore relies on the data gathered being based on the same questions or constructs (Berg, 2004, Savage, 2005). As Hayes (2000) cautioned, “simply reducing everything to numbers can be misleading, in that how often something is mentioned does not automatically show how important the theme is” (p. 125). I did seriously consider using formal content analysis as a method of data reduction and organisation but my elite interviews did not all cover the same questions or foci so the more formal method was not considered appropriate. Furthermore, I concluded that the richness of the data would be submerged in this apparently reductionist and inflexible process.

The postal survey, conducted at the end of the data gathering period, provided some quantitative data to support or refute many of the key themes from the teachers' narratives and to some extent this data informed the shape of the final data analysis. I analysed this data descriptively under the themes already identified, collating the statistical data into percentages and recording the respondents' individual comments. The numbers of the responses varied according to whether I was considering the number of schools (n=35), the number of teachers (n=45) or a larger number again which occurred for the questions in which respondents could provide more than one answer. The number of responses against which percentages were calculated is indicated for each table. I did seek advice about using a software package such as the *Statistical Package for the Social Sciences* for analysing this dataset but the sample was deemed not big enough to warrant this.

The discussion now turns to the theorising of the data collected and analysed in order to make sense of the findings of the study.

2.5.3 MAKING SENSE OF THE FINDINGS

Five heuristic devices have been utilised to theorise the lead educators' and classroom teachers' responses to the innovation and change that they experienced implementing senior social studies from 2002 to 2006. The heuristic device used throughout the succeeding four chapters is Bourdieu's social-field theory (Bourdieu, 1977, 1990). The three stage model or continuum of a secondary school subject's progress towards maturity (Layton, 1972) is also used throughout the following chapters. A typology of teachers' adaptations to education policy and practice (Brain et al, 2006) is utilised especially in chapter four. In addition, two other devices are used to add to the theoretical framework in specific parts of the thesis: (i) Louden's (1991) divisions of teachers' interests of reflection, and (ii) Dobric's (2005) typology of concepts that contribute to qualifications and assessment discourses and associated educational ideologies (chapter five).

The particular focus of the analysis is on the lead educators' and teachers' responses to curriculum and assessment innovation and change. While Bernstein (1971) identified three 'message systems' in education – those of “curriculum, pedagogy and evaluation” (p. 47) – I made the decision to confine the discussion to matters of curriculum and assessment (evaluation). This decision was based on the fact that this was not an observational study and that gathering data on pedagogy in senior social studies was not a major research focus. Some information gathered during the research period on pedagogies is included in chapter three (e.g., teacher self-efficacy) and in chapter four. Suggestions for future research into pedagogies for senior social studies are made in chapter eight, section 8.4.3.

The five heuristic devices which combine to form the theoretical framework are now described.

2.5.3.1 Social – Field Theory

Social-field theory was postulated by French sociologist Pierre Bourdieu in relation to a range of human endeavours. This theory has been adapted by others (e.g., O'Neill & Nash, 2005; Mutch, 2006) to explain the underlying motivations and patterns of behaviour in a range of disciplines, not just in education. Bourdieu did not consider this approach to form a rigid methodology but rather a process or transformation, a means for making sense of the forces at play in social situations. Not all of these forces, however, may be observable (Harker, Mahar & Wilkes, 1990).

Bourdieu considered the term social-field to be a relational concept with subjective relationships operating between key individuals and groups within an objective structure (the 'field'). The theory has been used in this study as an analogy to explain the roles and human interactions within educational contexts, with the social-field being regarded as a playing field which has “certain objective limits” (McNay, 1999, p. 100).

A social - field is similar to a field of play, a common ground on which the action occurs. This ground has boundaries where entry is blocked by existing holders of power. Within the field, players have positions that have both rules and status but they can be challenged at any time. Players, be they individuals or institutions, vie for possession of, or influence over, the object at stake – for example, control of educational policy making. (Mutch, 2006, p. 187)

In this study, the social-field is defined as the educational field of senior social studies in New Zealand, especially during the period 2002 to 2006. This was the common ground for the research participants as they were all involved in implementing senior social studies either at a national level or in the classroom. Only one of the participants was not involved in this way but did provide academic expertise regarding the values exploration process. This commentary aside, the key players were the lead educators and the classroom teachers who participated in the first three phases of the research. Officials from the MoE and the NZQA as well as people with decision-making powers in schools were also players in this social-field. They, and members of the social studies teachers' association ANZFSSA, comprise the professional communities of support for teachers. The rules and status of senior social studies have been provided by the conception, writing and implementation of the social studies achievement standards.

The second major concept in social-field theory is that of capital. Capital “denotes the different goods, resources and values around which power relations in a particular field crystallise” (McNay, 1999, p. 106). Further, the term refers to a number of aspects of human behaviour:

The notion of capital connotes how the players are invited to participate, or allowed access [to the social field]. This capital could be social, political, economic, cultural, or symbolic. Who has what capital, and in what amounts, sets up the hierarchically distributed power structure. (Mutch, 2006, p. 187)

In this study I have focused on cultural capital. Cultural capital is defined as “the actual value systems, practices, styles, strategies, beliefs, world views and outlooks developed within a class-cultural context” (O’Neill & Nash, 2005, p.

330). The capital brought into the implementation of senior social studies is considered to be educational – the knowledge, values and attitudes of a teacher’s university background whether it be economics, geography, history or sociology as a background to their role as a social studies educator. There is also considerable political capital operating within the field as exhibited by the MoE, the NZQA, schools and even ANZFSSA.

The third concept is that of habitus:

Habitus is a set of dispositions that are commonly held by members of a social group and these subjectively created attitudes, beliefs, and practices bind the members together so that they can identify and communicate with each other. It also allows them to recognise, and be recognised by, outsiders. (Mutch, 2006, p. 187)

Each of the key players in the current study displayed characteristics, dispositions or ‘feel for the game’ (McNay, 1999) regarding the human interactions that occur within the social-field. Habitus provides people with both a conscious and unconscious set of rules to govern their behaviour (Bouveresse, 1999) as well as the predisposition to potentially effect change, known as ‘agency’. Therefore an underlying tension emerges between the objective structure of the field which places certain limits on human behaviour and the subjective dispositions of the key players (McNay, 1999). This was considered by Bourdieu (1977) to create the dialectic between structure and agency (Harker, Mahar & Wilkes, 1990).

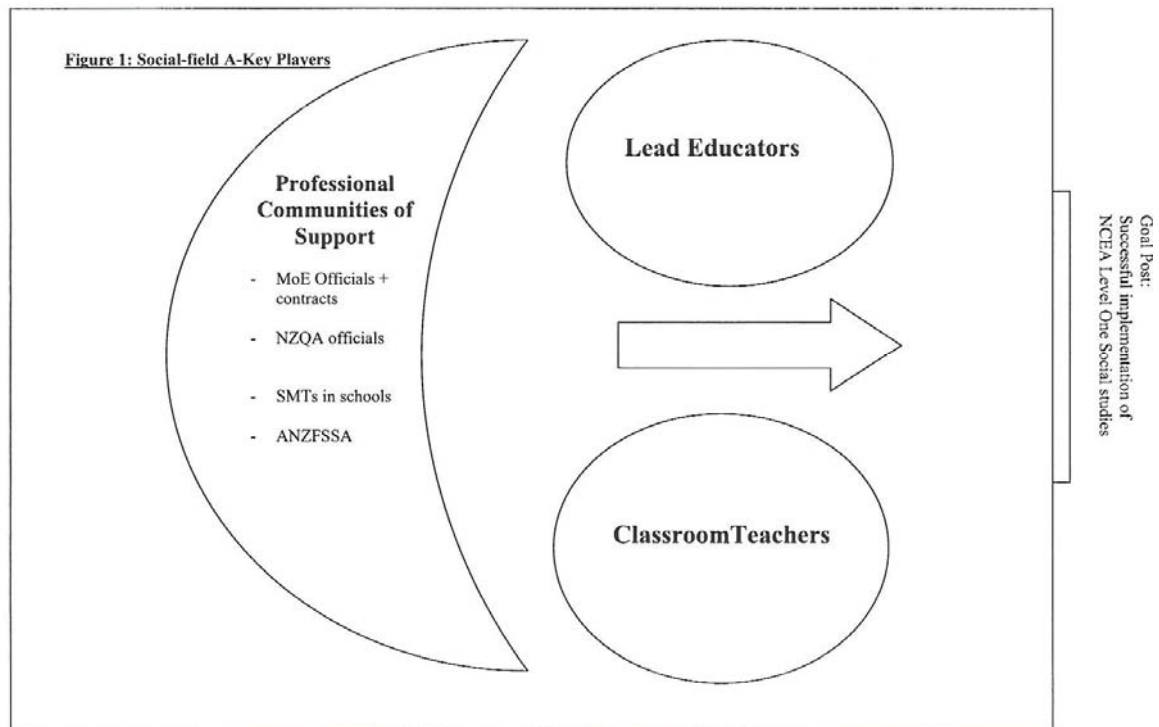
The developing sense of a shared understanding of what it means to be a social studies teacher, a specialised language and the sense of community amongst the small group involved in senior social studies in New Zealand are all germane to the concept of habitus. Secondary school teachers are considered to exhibit a very strong sense of collective identity, with a second layer of collective identity based on teachers’ university academic (or ‘parent’) disciplines (Couling, 2005; Keen, 1979; Peachey, 2005). A third layer is based on subjects taught, with the subject

being regarded as the 'lynchpin of identity' (Bernstein, 1971) in secondary schools.

The dynamic interplay of the game on the social-field can be regarded as a site of tension and struggle. The concepts of the social-field are highly abstract and it is only when they are worked out in practice that we can begin to see the forces at play. For example, curricula as represented by school subjects provide 'sites of struggle and contestation' (Goodson, 1988; O'Neill, 2004; Openshaw & Archer, 1992; Wendt Samu, 1998). Power struggles are inherent between the key players, with teams being seen to compete for scarce resources (e.g., subject departments competing for resources within a secondary school) or for dominance (e.g., individual subjects within a faculty or learning area). The professional communities of practice, the officials at the MoE and at the NZQA, have all had particular roles in establishing the parameters or rules of the game which can act to both enable and constrain the game. Senior management teams in secondary schools and the activists in the subject association for social studies, ANZFSSA, also have a role in supporting the key players.

Figure 1 is a visual portrayal of the social-field of this study. Visual models are helpful in portraying complex social phenomena in qualitative research (Creswell, 1998; Mutch, 2006). The research participants - the lead educators and the classroom teachers - are surrounded by their professional communities of practice (officials from the MoE and NZQA, senior management teams in schools and ANZFSSA members) all of whom have their focus on one goal. This goal is the successful implementation of social studies for the NCEA, especially at level one. This is not a contest or arena of conflict at this stage. The key players are all heading in the same direction.

FIGURE 1: SOCIAL-FIELD A-PLAYERS



In reality, however, the game is not so one-dimensional and constraints or rules are placed upon the players (both the lead educators and, especially, the classroom teachers) by the professional communities of practice. The subjective experiences of teachers, especially their desire to effect change, are restricted by the objective parameters of curriculum and assessment requirements.

The constraints of curriculum and assessment on teachers' daily work lives align with Bernstein's (1971, 1996) concept of the framing of knowledge. Framing is concerned with who controls what in the education system and how meanings are put together, "regulating the relationships between transmitters and acquirers" (Bernstein, 1996, pp. 26-27). The link between Bernstein's (1971) notion of framing, that is "who determines the selection, organisation, timing, pacing, and direction of the transmission of information" (p. 56), and Bourdieu's concern about dialectical relationship between structure and agency, that is the ability of teachers to effect change within the structures established by the state,

has been specifically acknowledged by Mutch (2006) in relation to social studies education in New Zealand.

The education system that teachers are currently working within in New Zealand falls within an outcomes-based education paradigm (Dobric, 2005). The achievement objectives which structure the social studies curriculum and the achievement standards which structure the standards-based assessment and qualification system the NCEA (Appendix A) are both manifested in educational outcomes. This is, in Bernstein's terms, a 'strongly framed' system. These outcomes represent goals which teachers must help their students attain. Critics of outcomes-based education point to the emphasis that such policies have on the end rather than the means, "with ends that are both narrowly defined and accepted without question" (Neyland, 2005, p. 111).

A number of terms have been applied to this outcome or ends-based system. These terms include an 'instrumental curriculum' (Neyland, 2005, 2007), a 'technocratic-reductionist' approach (Codd 1997; Schon, 1991), and 'performativity' (Ball, 2003). The term 'performativity' was coined in 1984 by French philosopher Jean-Francois Lyotard to indicate a new conception of knowledge as a dynamic energy that creates change. Lyotard predicted that "knowledge's importance would derive not from its links with truth, reason or certainty, but from its 'performativity' - its ability to do things" (Gilbert, 2005, p. 35). Performativity expresses the concern that what can be recorded, documented and reported about, in this case teaching, is more important than the educative process itself.¹²

Such writers have taken a theoretical approach to policy, typically with no accompanying empirical evidence. Their work is, nonetheless, important in terms of alerting policy makers and policy implementers to the dangers inherent in advocating such approaches. It is argued by these critics that the result of these policies, such as the implementation of standards-based assessment, is to

¹² O'Neill, A-M., pers. comm., 18.02.06

'deprofessionalise' (Locke, 2001) teachers to a point where "the teacher is held to be no more than a skilled technician" (Vossler, 2006, p. 203). Yet, it is also argued that teachers who are involved in decision-making about policy changes, such as those concerned with curriculum and assessment, are more likely to be involved in and learn from the changes (Aitken, 2006; Alison, 2006c) "rather than simply being seen as technicians who will obediently deliver whatever policy is developed by others" (Alison, 2006c, p. 1). Teachers' differing responses to such innovation and change are therefore the focus of the study, set within this wider context.

2.5.3.2 Stages in the Development of a School Subject

A simple three stage model or continuum of the progress of a school subject from inception to maturity was designed by David Layton (1972) in relation to the development of science as a subject in secondary schools in the UK in the late 19th century. Layton's model can be criticised for its simplistic, deterministic nature but has been adopted as a benchmark by New Zealand social studies commentators charting the progress (or lack of progress) of their subject during its sixty year history (Barr, 2000; Openshaw & Archer, 1992; Taylor, 2005). The three stages are summarised in Table 3, below:

TABLE 3: A THREE STAGE MODEL OF THE DEVELOPMENT OF A SCHOOL SUBJECT

Stage	Descriptors
One	<ul style="list-style-type: none"> • The callow intruder stakes a place in the timetable • Learners are attracted because of relevance to them • Teachers are rarely trained specialists but bring missionary enthusiasm of pioneers to the task
Two	<ul style="list-style-type: none"> • A tradition of scholarly work is emerging along with a corps of trained specialists • Students are attracted by its growing academic status as well as relevance • The internal logic and discipline of the subject matter is influencing selection of subject matter
Three	<ul style="list-style-type: none"> • Teachers now constitute a professional body with established rules and values • The selection of subject matter is determined by specialist scholars • Students' attitudes approach passivity and resignation

Source: Adapted from Layton, 1972, p. 11.

Another descriptor has since been added to Layton's stage three. 'Acquisition of university status' was deemed by Roger Openshaw and Eric Archer (1992) to be an important characteristic of a mature school subject. At that time they were pessimistic that the subject would not progress beyond stage two "experts emerge and the subject begins to generate its own internal logic" (p. 56). Eight years later Hugh Barr (2000) conceded that the subject "had moved some distance towards stage three" (p. 10). Subsequently, another study considered that the subject was gaining a "higher profile and greater credibility in secondary schools ... the defining factor being its inclusion for national qualifications since 2002" (Taylor, 2005, p. 169). Rowena Taylor posited that the introduction of senior social studies would be the 'defining factor' in enabling the subject to reach full maturity. Links to the descriptors above are made throughout the four succeeding combined data and literature chapters as appropriate and form the basis of an evaluation in chapter eight (section 8.3).

The third heuristic device related to teachers' responses and adaptation to educational innovation and change.

2.5.3.3 Typology of Teachers' Responses to Change

Teachers in their daily work lives are charged with mediating between educational policy and practice. In any response to policy change teachers are likely to reflect a wide variety of perspectives. Their responses to educational change are likely to range from enthusiastic acceptance to strong opposition. For example, Neville Northover (1980) considered there to be a 'normal curve of distribution' in teachers' responses to the introduction of the *Syllabus Guidelines* (DoE, 1977b), from enthusiastic acceptance to antagonism, with a somewhat larger "middling group" (p. 15). Some social studies teachers demonstrated considerable resistance to curriculum developments in the 1990s, whilst others who favoured the proposed changes reportedly showed exceptional "resilience when faced by ideological forces determined to undermine their position" (Mutch, 2003, p. iv).

A typology for considering the range of responses to educational change has been provided by Brain and colleagues (2006). They considered that teachers in their mediating role become the “medium for causing the result of policy as they carry it into schools and classrooms and deliver it to pupils” (p. 411). They observed that central government initiatives aimed towards increasing the functional efficiency of schools placed particular pressures on teachers, for it is obvious that policies are mediated by teachers within their schools, whether or not the teachers are supportive. Brain and colleagues distinguished between goals (i.e., purposes that apply to all members of the group) and means (i.e., the ways in which goals should be achieved) (p. 413). They categorised the crucial role of teachers in implementing and delivering educational policy made by others into five response categories. For each of these five positions on a continuum, they identified whether the teachers’ response was to reject the goals and means of the change. The ends of the continuum were conformity whereby teachers accept both the policy and practice, to rebellion whereby the reject and substitute the policy and practice as shown in Table 4, below:

TABLE 4: A TYPOLOGY OF TEACHERS’ ADAPTATIONS TO EDUCATIONAL POLICY AND PRACTICE

Adaptation	Policy	Practice
Conformity	Accepts	Accepts
Innovation	Accepts	Rejects
Ritualism	Rejects	Accepts
Retreatism	Rejects	Rejects
Rebellion	Rejects/substitutes	Rejects/substitutes

Source: Brain, Reid & Comerford Boyes, 2006, p. 413.

In the case of this research, the educational policy is the introduction of a new subject within the assessment and qualifications system, the NCEA. This typology is used in to consider both social science teachers’ responses to the introduction of social studies as an integrated subject at various times during the subject’s sixty year curriculum history (chapter four, section 4.2) as well as to changes in assessment. A summary of teachers’ responses to curriculum and

assessment innovations based on Brain and colleagues' typology is provided in Table 10.

2.5.3.4 Typology of Teachers' Interests of Reflection

The fourth heuristic device for analysing and interpreting teachers' responses to innovation and change is provided by Bill Louden (1991). He considered that the variety of interests underpinning teachers' reflection of their practice range from the technical, to personal, to problematic and through to critical. He used the term 'interests' to denote "the end goal of professional reflection" (p. 151).

Louden's participant-ethnography of the classroom practice of one teacher in Canada enabled him to analyse her reflections in a very detailed manner. As a result he cross-referenced the teacher's interests of reflection with her means or forms of reflection (introspection, replay and rehearsal, enquiry, spontaneity). My study has taken a much broader sample of teachers and used the less complex analysis of personal reflection, hence only the interests, and not the means, of reflection have been analysed. Louden derived these terms from the work of Donald Schon and Jurgen Habermas. Habermas argued that reflexivity or "the emancipatory cognitive interest of the critical perspective [provided] a medium for the exposure of the ideological constraints on ... research" (Shacklock & Smyth, 1998, p. 6).

In terms of Louden's (1991) categories, teachers' technical interests are taken to include the conventions of the subject such as the rules or procedures of curriculum and assessment; their personal interests are taken to mean their personal interpretations of situations which arise in undertaking their professional practice; problematic interests reflect problems which are externally imposed on teachers and which can disempower them from problem solving; while, lastly, "critical interests should lead to empowerment and emancipation" (p. 150). All four of these interests are evident in the data.

2.5.3.5 Typology of Assessment Discourses and Educational Ideologies

The final heuristic device used to analyse the data in this study was compiled by Karen Dobric (2005) to cross reference concepts contributing to four assessment and qualifications discourses with macro and educational ideologies. In particular, she linked macro-ideologies, assessment policy notions, qualifications and assessment discourses and educational ideologies to devise a four way categorisation as shown in Table 5, below:

TABLE 5: SERIES OF CONCEPTS CONTRIBUTING TO THE FOUR QUALIFICATIONS AND ASSESSMENT DISCOURSES

Macro-ideologies	Assessment policy notion	Qualifications and assessment discourse	Importance of achievement to different educational ideologies	Educational ideologies
conservation	certification	EXCELLENCE	leadership	traditionalism
libertarianism	performativity	USEFULNESS	function	enterprise
humanism	empowerment	FULFILMENT	growth	social reconstructionism
socialism	opportunity	RECOGNITION	enhancement	progressivism

Source: Dobric (2005), p. 94.

Dobric's categorisation resulted from her doctoral study which analysed the debates that the policy actors engaged in when they developed the new assessment and qualifications system the NCEA during the period 1996 to 2000. The perspectives of the policy actors were informed by their world views or ideologies. This heuristic device is therefore particularly appropriate within chapter five (section 5.5).

The final section describes and justifies the presentation of the findings of the study.

2.5.4 PRESENTING THE FINDINGS

The decision to adopt a storied-approach to the writing of the whole thesis was made following discussion with my supervisors on completion of the first draft

of the majority of the thesis. The first draft had been written using a conventional thesis structure – introduction, context, literature review, methodology, two data chapters, discussion and conclusion. Qualitative social science research, however, rarely takes place as neatly as my first draft portrayed. For example, due to the “... multiplicity of often contradictory sites, voices and ideologies ... a close reading of the ... transcripts of interviews may often result in a modification or re-evaluation of what initially appeared to be a clear analytic framework” (Opie, 1994, pp. 60-61).

The two original data chapters portrayed a dialectical relationship between the aspirations of senior social studies teachers on one hand, and the daily classroom realities on the other hand. Presenting the data as a series of binary opposites in draft one, however, obscured both the range of responses and the sometimes changing responses from the research participants. The strong personal narratives of the teachers were absent in the first draft. One of my supervisors suggested that writing the thesis as a narrative would be a more appropriate way to tell the teachers’ differing and at times conflicting stories. I therefore took the decision to weave a story which included both the literature and the data. This narrative style is argued to enable the richness of the teachers’ stories to be told and provides a more coherent story of the research process as it unfolded. Postmodern approaches by social researchers (e.g., Opie, 1994; Usher, 2000) have provided precedents for writing in a wider variety of styles. In New Zealand, educational researchers have sometimes combined their data and literature (e.g., Jesson, 1995; Mutch, 2003) in the manner adopted for this thesis.

One difficulty encountered by this approach was that a considerable amount of background material on curriculum and assessment, formerly in the context chapter, was relocated to chapters four and five. These chapters are therefore stronger on literature than they are on data. The information, however, provides a background against which the data can be better understood.

Six vignettes have been also provided in the combined data and literature chapters to profile key aspects of the data, particularly the more in-depth responses of the elite and focus group interviewees. Vignettes are typically short 'case studies' (Hayes, 2000) used to exemplify points made in the narrative.

The final research questions reported in the thesis were reframed from the original questions. Within qualitative methodologies, "the research questions may change or be refined" (Creswell, 1998, p. 181). The central proposition that focused the final thesis became "Teachers have experienced different and, at times, conflicting responses to the implementation of senior social studies for the NCEA, especially during the initial five years." The revised research questions have already been listed in chapter two (section 2.3.1). They are explicated further in relation to the literature in the following four chapters as well as synthesised in the discussion chapter (chapter seven). The chapter is now summarised.

2.6 CHAPTER SUMMARY

This chapter has chronicled and justified the changing research focus. The broadened focus of the research necessitated changes to the research questions along the way, as well as changes to the epistemology, methodology and, ultimately, the thesis title. While I could have ignored the earlier component of the research and written the thesis solely from the point of view of the final study, the evolving process is of interest and informs the final results and analysis. The evolving research process was, therefore, discussed in three stages – the original proposal, emerging tensions and redefined approach.

The four revised research questions provide a framework for evaluating the first five years' implementation of senior social studies, particularly for level one of the NCEA. The questions focus on teachers' personal and professional dispositions towards innovation and change, their responses to social studies curriculum developments, their responses to the evolution of standards-based

assessment in the social sciences and, lastly, on their responses to the support of the professional communities of practice available for teachers of senior social studies.

A largely qualitative mixed method approach was taken in order to gather data to answer these four research questions. This reflected my philosophical tensions and indecision based on my previous academic background. The study oscillated between positivist and critical paradigms and settled within an interpretive paradigm. Four phases of data collection were identified. The first phase comprised elite interviews of seven lead educators involved in NCEA implementation and/or social studies education at national and even international levels over a twelve month period. The second phase involved a focus group of four classroom teachers of NCEA level one social studies. This phase undertook the greatest change in direction. Toward the end of the data gathering period, a postal survey was sent to 67 schools offering AS90218 around New Zealand (phase three). The fourth and final phase - statistical data from NZQA and documents from ANZFSSA - completed the data gathering.

The data was analysed using a thematic qualitative analysis approach (Hayes, 2000) as summarised in Table 2. Five heuristic devices were utilised to theorise and make sense of the findings, including Bourdieu's social-field theory; Layton's (1972) stages towards subject maturity; Brain et al's (2006) typology of teachers' responses to educational adaptation and change; Louden's (1991) interests of reflection and Dobric's (2005) typology of qualifications and assessment discourses related to the introduction of the NCEA. The four chapters which follow interweave the data and socio-historical literature in a storied approach. Each chapter follows one of the three major themes which had their genesis in factors which were shown to enable or constrain the successful implementation of senior social studies in this study - *personal* (chapter three), *contextual - curriculum* (chapter four), *contextual - assessment* (chapter five), and *institutional* (chapter six).

CHAPTER THREE: PERSONAL FACTORS

DISPOSITIONS OF CONTEMPORARY PIONEERS

3.1 INTRODUCTION TO CHAPTER THREE

This chapter examines the dispositions of the research participants towards innovation and change within a particular education policy context. Factors which encourage teachers to accept and fully implement educational changes, or inhibit them from doing so, are the concern of this chapter. The educational innovation is the introduction of the National Government's education policy *Achievement 2001* (MoE, 1998) which heralded the introduction of the NCEA at school and classroom levels including, for the first time, social studies as a subject within the national assessment and qualifications system. This development was foreshadowed, however, by the inclusion of achievement objectives up to curriculum level eight in the *NZCF* (MoE, 1993). The responses of the lead educators and classroom teachers to the contemporary implementation of senior NCEA social studies from 2002 to 2006 are set against the background of the historical introduction of the subject in New Zealand secondary schools fifty years previously. The teachers' responses vary from aspirational and idealistic to pragmatic, from proactive to reactive, from optimistic to pessimistic.

The data from the four phases of the data collection are reported within the context of the relevant literature. The literature in this chapter draws largely upon the oral histories of the early social studies pioneers as recorded by Openshaw (1991) and the writings of some of these pioneers (e.g., Gorrie, 1963, 1964; Meikle, 1959a, 1959b, 1960, 1961, 1994). Phoebe Meikle is particularly well represented in this thesis because she chronicled and debated the issues facing social studies as a fledgling subject both in her early writings and her later autobiography, as well as being one of Openshaw's interviewees. The term 'pioneers' was used by Layton (1972) to highlight the "missionary enthusiasm" (p. 11) such teachers bring to the initial stage of the implementation of a new subject.

The dispositions of these early pioneers towards the introduction of social studies as an integrated subject in the 1950s and 1960s are considered alongside the dispositions of the contemporary pioneers. Further, literature relating to educational innovation and change, especially in relation to social studies, is introduced in this chapter. The theoretical framework of the social-field is developed within this chapter with Bourdieu's concepts of habitus and capital, introduced in chapter two, being especially relevant.

The chapter contributes to the overall thesis by comprising the first of four combined literature and data chapters. The interweaving of the data and the literature has already been justified in chapter two, *The Research Process*. The inclinations or dispositions of teachers towards educational innovation and change are the focus of the present chapter, whilst the subsequent two chapters explore contextual factors related to curriculum and assessment developments relating to senior social studies. The fourth combined chapter (chapter six) examines institutions which support classroom teachers of senior social studies. The findings of the four combined data and literature chapters are synthesised in the discussion chapter (chapter seven) while chapter eight concludes the thesis.

The headings and sub-headings used within this chapter arose during the iterative qualitative thematic analysis of the data (Hayes, 1997, 2000; Morse, 1994). The original research questions did not focus on the personal qualities of the teachers although in original research question four, a sub-question focused on the issue of professional isolation "*How do they [teachers] overcome issues of professional isolation?*" The attitudes and dispositions of the teachers regarding the introduction of senior social studies became apparent during the elite and focus group interviews. Parallels with early social studies pioneers were noted. The revised research questions addressed this through the revised research question number one:

How have the differing personal and professional dispositions of teachers impacted on the implementation of senior social studies?

The story of *personal and professional dispositions* is thus told in chapter three. It proceeds firstly with an analysis of the personal dispositions of teachers towards innovation and change, and secondly with an analysis of their professional dispositions towards two aspects of their practice as social studies teachers.

3.2 PERSONAL DISPOSITIONS

In this section, the motivations for adopting senior social studies by the contemporary pioneers from 2002 are considered alongside the motivations of their predecessors half a century before. In addition, self-efficacy beliefs and teacher self-definition are considered. These three sub-themes were decided upon during the data analysis phase, in response to the historical literature pertaining to the development of New Zealand social studies and the narratives of the research participants in the élite and focus group interviews. The third sub-theme, that of teacher self-definition, was also explored through the postal survey (phase three). Within each sub-theme, key concepts are identified and serve to focus each paragraph.

Dispositions are defined as the traits, attitudes, aptitudes and inclinations¹³ which motivate educators to accept challenges and to implement new educational policies. Such personal qualities are considered to position their holders favourably towards considering innovation and change.

Note that in this and the following chapters the terms used for the research participants, as shown in the list of abbreviations, are as follows:

INF = Informant or lead educator, that is the élite interviews during phase one of the data collection.
PAR = Participant or teachers of AS90218, that is the focus group teachers interviewed during phase two of the data collection.
RES = Respondent or teachers of AS90218 who responded to the postal survey in phase three of the data collection.

¹³ Hawker, S. (2002). Compact Oxford Dictionary Thesaurus and Word Power Guide. Oxford: Oxford University Press. p. 263.

3.2.1 MISSIONARY ZEAL OF CONTEMPORARY PIONEERS

The phrase 'missionary zeal' evokes images of highly enthusiastic teachers, with deep levels of intrinsic motivation. Intrinsic motivation has been defined as the engagement in "an activity for its inherent satisfactions rather than some separable consequence" (Ryan & Deci, 2000, p. 56) whereas extrinsic motivation does have some separable consequence. The term 'intrinsic motivation' as used in this study implies a high level of enthusiasm, passion, and commitment. 'Extrinsic motivation' on the other hand, is used in this study to refer to a more pragmatic and functional approach. Pioneers are considered in this study to be teachers and educators who have committed to social studies as a new subject, the contemporary pioneers being those teachers who have implemented senior social studies especially at NCEA level one. Teachers with a high level of intrinsic motivation have been termed 'idealists' whilst those with a higher level of extrinsic motivation have been termed 'pragmatists'. The data for this sub-theme derives mostly from the first two phases of the research (élite and action/focus group interviews) with data in Tables 6, 7, 8 and 9 also drawn from the third phase (the postal survey).

A small number of history and geography teachers adopted the new subject social studies in the compulsory core curriculum of the secondary school during the 1950s and 1960s with "missionary zeal" (Openshaw & Archer, 1992, p. 47). Advocates such as Phoebe Meikle, Thelma Maurais (later Allardyce), Charlie Herbert, Ian Sage, David Francis and Averilda Gorrie (interviewed in Openshaw, 1991) are now regarded as early pioneers who were highly motivated by the integrated subject social studies, despite fierce hostility from their colleagues (this is developed further in chapter four). Not all remained steadfast to the new subject, however, with Gorrie shifting her primary allegiance back to her parent discipline geography as time went on (Gorrie, 1963; Openshaw, 1991).

These early pioneers were passionate advocates, highly committed and influential leaders. Ray Fargher (interviewed in Openshaw, 1991) noted that three women exhibiting very strong leadership was unusual in an era when most

HoDs and most school inspectors were men. The liberal humanistic ideals of the members of the Thomas Committee, revealing a strong sense of social responsibility, had been reflected in the tenor of the whole *Thomas Report* of 1944 and were particularly pertinent to the newly integrated subject of social studies (Meikle, 1960, 1961). Advocates were very committed and generous with their time, knowledge and resources in wishing to share their enthusiasm for the new subject with their peers. For example, the large number of student teachers sent to Meikle for supervision and the teacher refresher courses she facilitated around New Zealand, necessitated her to comment “I added ‘missionary’ work to my [school] duties and between 1952 and 1969 sermonised about social studies in various parts of New Zealand” (Meikle, 1994, p. 109).

The freedom provided by the *Thomas Report* recommendations was appreciated by the early pioneers. This freedom contrasted with the reported narrowness, rigidity and authoritarianism of the previous era (Meikle, 1960; Whitehead, 1974). Even for these teachers, however, there may have been too much freedom, a mixed blessing because of the insufficient level of professional development and classroom resources (Aitken, 2005b; Couling, 2005; Whitehead, 1974). A perusal of exercise books from a form four student of Meikle’s in 1952 revealed a very thorough coverage of somewhat traditional historical and geographic topics, with some local area studies for which Meikle was renowned.¹⁴

Half a century later, several of my research participants exhibited a similarly high level of intrinsic motivation and commitment in introducing senior social studies. Terms like ‘passion’ were used frequently by contemporary advocates of senior social studies. For example, RES16 wrote the unsolicited comment on her postal questionnaire “I am absolutely passionate about senior social studies”, whilst INF1 claimed “I am more than enthusiastic, I am passionate ...”. A strong sense of motivation was expressed by INF2 “It was my passion to open doors and open opportunities for the boys”. The focus group teachers expressed their enthusiasm

¹⁴ Reade, L., Social studies exercise books, Takapuna Grammar School, 1952. Unpublished.

for the subject because they could cater for students' interests with highly motivating topics of "contemporary relevance" (PAR4). One teacher in the postal survey reported that by offering senior social studies in her school as well as the more traditional social science subjects, their students could become "complete social scientists" (RES23). The lead educators, who were no longer classroom teachers, also expressed their strong commitment to and motivation to enhance senior social studies (INF3, 5, 6, & 7).

Whereas some contemporary pioneers articulated a high level of missionary zeal, others were more guarded. This cautious approach had been foreshadowed prior to this research at a meeting of pre-service and in-service social studies educators. They reported that geography and history teachers were reluctant to introduce senior social studies because they predicted internal competition for students within their departments and that they felt more comfortable with their traditional subjects.¹⁵ This mirrored the situation in the 1970s when form 5 social studies was introduced as a non-examinable subject. One of the five principles for the development was that "the content of a [social studies] course should not overlap Form 5 History/Geography" (Austin, 1985, p. 23). Indeed, Aitken (2006) noted that social studies had been seen as a subject that tackled information that fell through the gap between history and geography.

A high level of caution and pragmatism were evident also in the comments of two of the focus group participants in relation to their introduction of the subject for the NCEA. For example PAR2 and PAR3 considered that introducing level one social studies in year 10 would motivate students to take the more traditional social sciences in year 11 and build up their social science numbers although both considered the possibility of expanding the subject in years to come. PAR2 explained "It's a numbers game The numbers are marginal in lots of subjects ... we are being cautious", with PAR3 concurring "We're hoping to introduce

¹⁵ Notes of meeting 22 August, 2001, Wellington, organised by the Ministry of Education to consider the Education Review Office Report: ERO (2001). *The New Zealand Curriculum: An ERO perspective, Part 4.*

level one into year 11 to keep kids in the department". The motivation to encourage students to take at least one social science subject, preferably two, and to maintain numbers within social sciences was also expressed in the review of the 1970s developments (Austin, 1985).

A similar level of pragmatism was revealed with the voluntary responses to the postal survey. Some teachers reported that they introduced senior social studies in year 10 in order to develop in students the knowledge and skills to prepare them for success in geography and history in year 11. "It is important to promote history and geography at years 11, 12 and 13" (RES37). This motivation mirrors that of the traditional social sciences in the School Certificate era (Meikle, 1959a; Openshaw, 1991, 2005; Whitehead, 1974) when social studies timeslots in forms 3 and 4 (now termed years 9 and 10) were seen as an opportunity by many teachers to prepare their students for the important examinations the following year. Social studies was therefore perceived as a 'feeder' subject. This issue is developed in more detail in chapter five (section 5.4.1).

Critical incidents which had prompted the contemporary pioneers to introduce senior social studies in their schools varied with INF2, for example, wanting to open opportunities for her students and "nobody disputed it so I just went ahead and did it". In contrast, PAR1 had to fight hard to introduce the subject. INF1 was told she had to introduce senior social studies by her HoD, she had no choice. Initially reluctant, she soon became very enthusiastic about the subject.

Two teachers in the postal survey reported extremely pragmatic motivations for offering only one or two internally-assessed achievement standards to year 10 students - "to keep students focussed after exams" (RES35), and because "external exams for year 10 students clash with annual camp week. Many in our school opted for camp" (RES29). A similarly pragmatic response, this time with an economic rationale, was noted by INF2 who reported that her school only

entered year 10 students in social studies internally-assessed achievement standards because if they entered them into the externals “they’d have to pay”.

Table 6, below, reveals that almost half of the schools (48.5%) who responded to the postal survey were offering level one social studies to year 10 students in 2005 and/or 2006. The same proportion of schools was offering level one social studies to year 11 students. This is similar to the split evident in both the focus group and the two classroom teachers in the elite interviews. One school in the postal survey offered level one social studies to all their English for Speakers of other Languages [ESoL] students.

TABLE 6: SCHOOLS OFFERING LEVEL ONE NCEA AT YEAR 10 & YEAR 11¹⁶ N=35

Year	Type of course	No. of schools	Percentage
Year 11			
Mixed ability year 11	Full course externals/internals	12	34.3%
Mixed ability year 11	Achievement & unit standards mix	1	2.8%
Lower ability year 11	Achievement & unit standards mix	2	5.7%
Lower ability year 11	Internal achievement standards only	2	5.7%
Total year 11			48.5%
Year 10			
All year 10 students	Internal achievement standards only	2	5.7%
Accelerated year 10s	Full course externals/internals	5	14.3%
Accelerated year 10s	Internal achievement standards only	9	25.7%
Accelerated year 10s	Achievement & unit standards mix	1	2.8%
Total year 10			48.5%
Other			
ESOL classes	Achievement & unit standards mix	1	2.8%

Source: Phase Three: Postal Survey, Question 2.3; Appendix H.

¹⁶ Percentages in tables throughout the thesis may not add up to 100 because of rounding errors.

Of the four focus group teachers (phase two):

- One was offering a full course of internal and external achievement standards to a group of accelerated year 10 students.
- One was offering a full course of internal and external achievement standards to a mixed ability year 11 class.
- One was offering internal achievement standards only to a class of accelerated year 10 students.
- One was offering a mix of internal achievement standards and unit standards to a lower ability year 11 group.

Of the two classroom teachers in phase one:

- One was offering a full programme of internally and externally-assessed achievement standards in years 11 to 13, as well as some internals to year 10 students.
- One was offering level one internally-assessed achievement standards to both mixed and high ability year 10 students.

As the above discussion shows, the motivation of the key players in the social-field of senior social studies ranged from the altruistic through to the pragmatic. The levels of excitement, enthusiasm and commitment reported by some of the players who held high aspirations for the future of the subject were tempered by the more pragmatic motivations of others. The former may, arguably, also exhibit strong personalities with one teacher admitting that in her school, senior social studies was “personality-led” (INF1).

This range of responses to the introduction of senior social studies is consistent with the notion that in educational change, there is the potential for a wide range of responses, from highly enthusiastic acceptance to strong opposition, or, put another way, a ‘normal curve of distribution’ (Northover, 1980). The introduction of social studies in the senior secondary school is not compulsory, so the HoDs who did opt for this innovation (e.g., INF2, PAR 1 & 2) would have had

to argue for its inclusion within an already crowded senior curriculum. Other members of departments, (e.g., INF1, PAR 3 & 4), would have had less choice. In terms of Louden’s (1991) categories cited in chapter two, the personal interests of the players were paramount and could reflect the more active or passive decision-making roles taken within their subject departments (chapter six, section 6.4.2).

An individual’s involvement in the adoption of an innovation, such as introducing a new subject for a national assessment and qualifications system, progresses over time. In the 1970s, John Renner (1976) identified six stages in such a progression, from “beginning awareness ... information seeking ... active information seeking, tryout, evaluation ... efforts to adopt the innovation ... accustomisation and internalisation ... and finally innovation becomes routine” (p. 111). The schools surveyed did rise to the challenge quite quickly, with just over one-quarter (28.6%) of them reporting implementation of level one social studies in the first year 2002, followed by the peak of almost one-third (31.4%) in the second year of implementation (2003). The proportion declined from 2003 on, reducing to 20% in 2004, 11.4% in 2005 and 8.6% in 2006, as shown in Table 7, below.

TABLE 7: SCHOOLS BY YEAR OF IMPLEMENTATION OF LEVEL ONE SOCIAL STUDIES N=34

Year	Number	Percentage
2002	9	28.6
2003	11	31.4
2004	7	20.0
2005	4	11.4
2006	3	8.6
Total	34	100

**NB One school did not indicate year of implementation of level one.
Source: Phase Three: Postal Survey, Question 2.2.**

Of the nine schools who began offering level one social studies in 2002 (early innovators), six were still offering the subject through to level three by the end of the five year study period. Of these six, four indicated an intention to continue to

offer senior social studies over the following five years from 2006, while two were unsure (Table 8; Appendix H).

Schools' intentions of offering levels one to three social studies were ascertained by Question 7.1 of the postal survey "What do you consider the prospects for senior social studies in your school over the next five years?" Responses indicated that 12 of the 21 schools (57%) who offered only level one social studies in 2006 were committed to continuing with level one over the next five years. Of these twelve, nine were offering only the internally-assessed achievement standards in 2006 (Appendix H). Two of the three schools offering levels one and two at the time of the survey intended to continue these, but none indicated at that stage that they would adopt level three. Of the eleven schools offering all three levels of senior social studies in 2006, nine indicated that they would continue to offer level one, seven that they would continue to offer level two and seven that they would continue to offer level three. This is shown in Table 8, below.

TABLE 8: SCHOOLS' STATED COMMITMENT TO OFFERING NCEA LEVELS ONE-THREE OVER THE SUCCEEDING FIVE YEARS (2007-2011) N=35

Level offered in 2005/2006	Number of Schools	Level One over next 5 years	Level Two over next 5 years	Level Three over next 5 years
Level One only	21	12	1	0
- year 10	15	10	0	0
- year 11	6	2	1	0
Level One & Two	3	3	2	0
Levels One, Two & Three	11	9	7	7
Total	35	24	10	7
Percentage of total		68.6	35	20

Source: Phase Three: Postal Survey Question 7.1.
Refer to Appendix H for more detailed data.

Thus two-thirds of all the schools (68.6%) who responded to the postal survey indicated that they intended to offer level one over the next five years (although a

large proportion of these respondents were just offering the internally-assessed achievement standards), just over one-third (35%) to offer level two and only one-fifth (20%) to offer level three.

This analysis and discussion reveals a clear division between schools. Almost half of the schools participating in the three phases of the research were offering level one social studies achievement standards to year 10 students, while the other half were offering level one to year 11 students. This division exemplifies a stark variation in teachers' and schools' motivations for engaging with senior social studies.

The low numbers committing to levels two and three social studies in the future as shown in Table 8 were of even more concern. Responses to question 7.1 in relation to levels two and three conflicted. For example, RES8 stated "Not sure if we will continue to offer L 3 - depends if the 'perspectives' get sorted out. At the moment not good due to both teacher and student frustration." On the other hand, RES10 indicated L1-3 social studies to be "an area of growth" and RES22 noted that "Advantages of 14 internally-assessed credits is a strong 'selling point'. Strongly embedded as senior option." The responses revealed a rather pragmatic approach to the innovation of senior social studies as a viable three year social science option in the senior secondary school.

Such patterns of provision and intention clearly have the potential to impact on the self-efficacy of the contemporary pioneers, to which the discussion now turns.

3.2.2 TEACHER SELF-EFFICACY

The concept of self-efficacy is a key component of social cognitive theory. This theory had its origins in 1941 when Miller and Dollard proposed the theory of social learning and was broadened by Bandura and Walters in 1977. Social cognitive theory explains how people acquire and maintain behavioural patterns, based on their observations of the environment, others' behaviours, the context

and other cognitive and affective factors. Self-efficacy is defined as belief in the future success, with Bandura (2006a) arguing that such beliefs are “the foundation of human motivation, well-being and accomplishments” (p.3) because ultimately self-efficacy beliefs provide the individual with the conviction that they can effect change through their own actions. Self-efficacy beliefs therefore are future and goal focused, context specific and contribute to human agency. Put simply, self-efficacy is the belief that one can achieve what one sets out to do.

Within this study, the term self-efficacy is used to refer to teachers’ belief of the future success of themselves and their students to effect change by implementing senior social studies. Within this sub-theme, the key concepts considered are teacher agency, self-confidence, initiative, resourcefulness, and leadership roles within the small social studies community. The term self-efficacy does not necessarily assume self-confidence.

The lead educators and several of the classroom teachers exhibited high levels of teacher agency, the belief and ability to effect change. These key players saw the emphasis of the subject on social issues as an opportunity to engage students with ‘big picture’ issues that would make a difference in their thinking and their lives, and broaden their horizons. The focus on issues of concern and relevance to students was identified by Layton (1972) as characteristics of both stage one and two of his model. Like some of the early pioneers, some of these teachers expressed social-democratic ideals. For example, RES25 noted “My views are left of centre and I value the ethic of my school which encourages caring for our community.”

INF1 described how her love of current events (“I’m a news junkie”) impacted on her classroom practice:

... the biggest thing for me was 9/11. The kids came to school after that asking ‘Who is Osama Bin Laden?’ ‘What are Al Qaeda?’ ‘Why did they do this?’ ... to me this was the turning point. It got our kids interested in what

was happening overseas And then I could see the scope for senior social studies.

Comments from most of the lead educators and from a number of the classroom teachers were aspirational, at times idealistic, and focused on possibilities. The responses demonstrated a high level of self reflection and concern that they were 'getting it right'. These idealists reported that they were prepared to take risks, to be flexible and resourceful and were determined to succeed, although this involved additional work. "Background reading is imperative for teachers' understanding" (RES11). Over the five year period studied, reported levels of self confidence had increased for some teachers. For example, "After four years, we have just about got it right. I hope they don't try to over-think social studies and kill it!" (RES26b). Some, like INF1, reported being initially very generous with their knowledge and resources. After some time, however, INF1 became more selective with whom she shared her expertise and resources.

With self-efficacy may come the self-confidence to take on leadership roles. INF1 expressed surprise at how quickly she was asked to adopt a leadership position. "I just love it and it's working well for me. And I guess that is because of moderating, marking, beacons. I feel confident in what I am doing and I feel like I'm almost in the national loop so to speak".

Teachers who displayed a strong sense of self-efficacy were likely to be more confident in adopting pedagogies which challenged students' thinking. They were confident in facilitating discussion and debate and enjoyed encouraging their students to question assumptions and stereotypes. PAR4, for example, shared with the focus group her debating strategy termed an Irish Debate which involved all students in the class in lively discussion on issues studied.

INF2 expressed her high level of self-confidence:

I think I have moved - in my abilities as a teacher in the classroom I have gained more confidence and I think that has enabled me to experiment

and to take risks and to try different things with the social studies curriculum that I might not have tried in the past.

Other research reported that teething problems occurred for all subjects in the initial years of introducing the NCEA (e.g., Alison, 2005). Early problems were exacerbated for social studies which had no previous history of assessment and qualification in the senior secondary school. These problems affected teachers' sense of self-efficacy. RES8, for example, commented "Good intentions - finding the practice more difficult due to lack of resources and clear guidelines (or at least sensible ones) and exemplars so that we are sure of what we are doing" while RES34 strongly expressed concern that "this is a subject hijacked by 'radicals' - it should have academic rigour and there shouldn't be changes and constant variations."

Teachers' sense of self-confidence could readily be diminished. The importance of having a sense of certainty about one's practice has previously been noted (Meikle, 1960). Conversely, the isolation experienced as the sole teacher of a subject, which many of these contemporary pioneers were especially in the initial years, can lead to feelings of insecurity and guilt "... in the way that teachers often talk about it, when guilt is bound up with overwhelming feelings of frustration and anxiety, it can become demotivating and disabling in one's work and one's life" (Hargreaves, 1994, p. 142). In particular, Andy Hargreaves (1994) noted that teachers experience 'persecutory guilt' through trying to understand, implement and attain "accountability demands and bureaucratic controls" (p. 143). The importance of having peers to share ideas with has been reinforced (Renner, 1976), with educational innovations tending to spread "homophilously" (p.110), that is, teachers learn best from fellow teachers rather than from persons holding a higher or lower status.

The sense of professional isolation (Clark, 2001; Louden, 1991) reported in the early period by INF1 and the focus group teachers tended to dissipate as the study period progressed. The criticism that teachers tend to 'talk shop' all the

time (Clark, 2001) underlines the importance of networking and sharing authentic professional conversations with peers. In a recent study of the implementation of geography for the NCEA, Murray Fastier (2007) found that for teachers in sole person or small departments, “the implementation process [was] more onerous, with fewer people to share the workload or to discuss and clarify ideas with” (p. 219).

In response to Question 1.4 of the postal survey “*How many teachers are involved in teaching senior social studies at each level?*”, ten teachers out of 35 schools (28.5%) indicated that they were the sole teacher of level one social studies in their school. PAR2 expressed his concerns about being the sole teacher and the associated sense of isolation. (Teachers’ sources of professional support are reported in chapter six, Table 19).

Teachers in both the focus group and the postal survey expressed on-going concerns and uncertainties which impacted on their confidence. Many of these reflections involved quite technical concerns (Louden, 1991) relating to the conventions of the curriculum and especially assessment – such as unclear definitions of terms, interpretations of the explanatory notes relating to each achievement standard, appropriate selection of topics or contexts for study and changes in assessment requirements. For example, in the first focus group day PAR1 expressed her frustration over the interpretation of the terms ‘consequences’ and ‘significance’ in AS90218, noting that this impacted both on her confidence and that of her students. This is described in Vignette 1, overleaf.

VIGNETTE 1: UNCERTAINTY OVER INTERPRETATION – ‘CONSEQUENCES’ OF VALUES POSITIONS

PAR1 expressed her angst, and that of her students, over the term ‘consequences’ in AS90218. Were they the consequences of the actions of people holding certain values positions or of the values positions themselves?

She talked about her waning self-efficacy *“Personally I really struggle with the consequences and I think I’ve got it wrong, so therefore the students really struggle with it too. The GE unit was a bit of a disaster... I want to know how to do it properly...”*. Later she referred to *“My favourite friend ‘consequences’.”*

“I’ve found students struggle with the term ‘consequences’ especially of people holding different values positions. Conflict is an easy one to identify but they tend to centre on similar answers for positive/negative, short-term and long-term. The consequences are where most of them fail. Only more capable students are able to recognise the significance as being the long term rather than repeating consequences. Significance should be in the Explanatory Notes.”

Discussion on this technical issue continued on day two with PAR2 taking the discussion to a higher level of abstraction. PAR5 noted that in version two of AS90218 the term ‘consequences’ was still not defined. Struggles over issues of interpretation therefore add to the sense of uncertainty felt even by experienced teachers when implementing something new.

The failure to define the term ‘values positions’, which is an important component of the values exploration process, was regarded as a major omission of SSiNZC (MoE, 1997).¹⁷ Respondents to the postal survey were asked in

¹⁷ A paper to clarify the values exploration process for senior social studies, *Guide Notes: Social Studies Values Achievement Standards* was finally written and made available on TKI to teachers on 12.06.08. http://www.tki.org.nz/r/ncea/socstud_valuesresource_12jun08.doc.

Question 4.2 how they defined this term with their students. The majority of respondents reported that they used the term “viewpoints or points of view” (43%), while others wrote “beliefs” (27%), “perspectives” (9%), “opinions” (2%) and 19% did not respond. Some teachers noted that they used the definition from the achievement standard which was “viewpoints or points of view”. However, values positions are considered to be deeper than points of view.¹⁸ Discussion over the use of the terms ‘viewpoints’, ‘values’ and ‘perspectives’ occurred in the wider social studies community during the study period (chapter six, section 6.3.2).

PAR2 differentiated between his high level of confidence with the teaching but low level of confidence with assessment. “I’ve got no problem with the teaching. I’m pretty confident that the kids hit the mark and that learning is occurring appropriately but when it comes to assessment, it relies on intuition”. Intuition or ‘tacit understanding’ has been argued (Neyland, 2007) to underpin a teacher’s professional judgement.

PAR2 expressed confidence in implementing his other senior social science subject, history, but his confidence wavered with senior social studies. Despite very carefully preparing his students for the external examinations, he was often mystified by the marking and their subsequent results. “I think no matter how much you look at the official documentation, there’s always your personal interpretation of it” (PAR1). This is clearly more difficult for the sole teachers of senior social studies who cannot confer with a colleague.

Similarly, RES27 considered she lost her self-confidence in the process of implementing senior social studies:

I actually feel completely inadequate and lost my confidence in teaching because of the moderators’ comments year after year. I nearly gave up [senior social studies] and lost my creativity and enthusiasm, yet I teach 4-5 junior classes and love them.

¹⁸ Keown, P., pers. comm., September, 2003.

For all subjects, the initial years of NCEA implementation were characterised by both teachers and students feeling like they were 'guinea pigs' (Hipkins, Conner & Neill, 2006a). This was particularly so for senior social studies where there was no previous history of national examinations. INF2 noted in her role as a HoD and as a moderator:

There's so many teachers, I know in that first year, who kept saying "Oh, I don't know what we are doing. It's our first year of NCEA." But the kids, the guinea pig kids, became very unsettled with it. They were very unsure of themselves, even though what they had been given is probably a higher quality, but because the teachers were lacking confidence The students did too, but kids pick up on things very quickly.

A high level of initiative and resourcefulness was demonstrated by some of the contemporary pioneers. This is vital for a subject which focuses on social justice issues of a highly topical nature. For example, INF1 reported with delight how she arose every morning at 6am to log onto the CNN website to find out what had happened in the world overnight and how she could incorporate the new developments into her classroom teaching. The internet has served as an important resource for teachers who focus on contemporary social issues on local, national, regional and global scales. Teachers responding to the postal survey Question 3.6 "*What are your main sources of information?*" showed a high reliance on web-based information – 36% noted their reliance on TKI, 23% on *Social Studies Online [SSoL]* on TKI, 5% the NZQA and one mentioned the World Vision Website. On the other hand, 30% noted *Examiners' Reports*, which are also available electronically, plus 5% "other".

Some teachers considered a topical focus burdensome in that they were continuously creating new units and assessment activities that tended to have a very short shelf-life before the issue became outdated or resolved. RES24 stated "Units are outmoded within a year." Another pragmatic consideration was the cost as well as the time involved:

As with most of the social studies course it is a requirement to use very up-to-date material that is both costly and time consuming. I feel that in

terms of both preparation and assessment and funding, we are disadvantaged. (RES25)

The low level of resourcing of social studies has been a constant theme since the introduction of the subject in the 1950s (Couling, 2005; Evison, 1963; Keen, 1979; Meikle, 1959a; Openshaw, 2004). Meikle, for example, commented on the need to create her own resources. This situation was mirrored in the study: "I just wish there were more resources available. I spend so much of my time writing and creating resources" (INF1). Moreover, this impacted on departmental finances. One teacher, also a HoD, noted that halfway through the year only a fifth of their photocopying budget remained. "That's reflective of the changing nature of the teaching department The teachers are now making their own resources ... they are finding things in magazines, colour photocopying and laminating them for the boys to use Textbooks are becoming obsolete" (INF2).

The contemporary nature of senior social studies, as well as its relative lack of prescription, provides too small and changing a market for text books to be written (Couling, 2005).¹⁹ Similarly, teachers responding to the 1970s developments of form 5 social studies "... saw resources as a problem, with a lack of textbooks which are readable, relevant and topical. Most courses relied on teacher initiative in finding resources" (Austin, 1985, p. 25). In the current study, one of the teachers from the postal survey reported "I feel confident with our own resources" (RES19) while another pleaded for more online support "I would love more online unit outlines - as a beginner teacher they are very helpful" (RES10).

The role of educational capital, especially teachers' self-definition, is the third component of personal dispositions, and the next focus.

¹⁹ An experienced social science text author was approached by a publishing company in 2004 to write texts for senior social studies, but the company later decided that the market was insufficient to support this. Childs, R., pers. comm., 16.10.08.

3.2.3 TEACHER SELF-DEFINITION

The notion of self-definition refers to teachers' sense of identity within the teaching profession. "It encompasses the personal and the professional ... it is part of who I am" (Smethem, 2007, p. 471). School teachers generally define themselves initially according to their sector, then according to their subject or academic discipline, with "the subject [being] the lynchpin of identity" (Bernstein, 1971, p. 56) within secondary schools. Sometimes teachers resocialise themselves into another subject identity during their teaching career (Bernstein, 1971). Their self-definition relates to their 'orientation to curriculum' (Kemmis, Cole & Suggett, 1998) which includes differences of both style and code, the latter linking to the social-field theoretical framework by referring to the "agreements about how the game is to be played" (p. 139).

If teachers define themselves as social science or social studies teachers they are more likely to be positive about the integrated subject social studies in the senior school than those who primarily see themselves as geography or history teachers. Teachers are also more likely to adopt an innovation if the values of the innovation match their own values (Alison, 2007; Renner, 1976), the values arising from their educational capital such as their parent discipline. The concepts explored within this sub-theme include parent discipline, dual allegiance and sibling rivalry.

A lead educator revealed that she had transcended her parent discipline and perceived herself to be social science educator:

I have developed a passion for social studies and I would probably say it's also because I have never seen myself as a geography teacher. I've always seen myself as a social science teacher. But I was trained to teach history and geography and social studies ... and English. And I think that having those different facets to my training meant that when I came out I wasn't locked into a set curriculum area. (INF2)

Within the focus group (phase two), three of the teachers had geography as their parent discipline whereas one was an historian. This ratio between the

geographers and historians teaching senior social studies was similar to that of the postal survey as shown in Table 9, below.

TABLE 9: PARENT DISCIPLINES OF RESEARCH PARTICIPANTS

N=56

	Economics	Geography	History	Mix - History & Geography	Social Studies	Other
Élite Interviews	0	5	1		7	2
Focus group	1	3	1			
Postal survey	1	18	7	2	8	7
Total	2	26	9	2	15	9
Percentage	3	41	14	3	24	14

NB. Some participants claimed more than one parent discipline.

Source: Phases One, Two & Three.

Geography tended to dominate as the parent discipline of the majority of teachers, with 41% claiming geography and 3% a combination of geography and history. In the focus group, for example, three of the teachers taught geography and one history. Three of the focus group teachers had completed their NCEA training in their parent discipline, with one of the geographers not having received any NCEA training at all. They expressed allegiance to both their parent discipline and to senior social studies and tended to refer to their parent discipline as a benchmark when seeking a point of clarification or issue related to the assessment of senior social studies "... that's the trouble That's where you have had your training" (PAR1). Conflicts of interest can occur when new curriculum and assessment policies are introduced, "since most secondary teachers have already been apprenticed in a traditional subject discipline" (Locke, 2001, p. 8) which might sit uncomfortably with a new subject.

The postal survey respondents also revealed a strong allegiance to geography. In response to Question 3.4 "Do you teach other senior subjects?" 43% reported that

they also taught geography, whilst 30% stated they had received their NCEA training in geography and as already stated, 41% regarded geography as their parent discipline. The historians, in contrast, were less well represented amongst teachers of senior social studies - 14% of the teachers in the postal survey also taught history, 6% had received their NCEA training in history and 14% had history as their parent discipline.

Only 22% of the teachers responding to the postal survey undertook all of their NCEA training in social studies while a further 17% undertook some of their NCEA training in social studies. A small proportion (19%) of the sample taught only social studies as a senior subject. Teachers were mixed in their responses to Question 3.5 of the postal survey which asked "*Is your primary allegiance to social studies or to your other senior subject(s)?*" Forty percent replied "the same", 33% replied "no" or did not respond while only 26% indicated that their primary allegiance was to senior social studies. This final group represent the "corps of trained specialists" (Layton, 1972, p. 11) which Layton considered a key descriptor exemplifying the second stage of a school subject's development.

The contribution of the various social science disciplines to social studies and the necessity of social studies teachers adopting a broad world view were commented upon by INF3:

... to teach social studies well, people need to be able to not just get trapped in one discipline. And if people are too much tunnel vision down, for example geography or any other discipline [political science, anthropology, sociology], then they'll find social studies difficult because social studies is designed to be cross discipline ... it's really the ability to think broadly that social studies encourages.

Very little evidence of social science subject allegiance other than to geography and history emerged from the study. As can be seen from Table 9, there were only two mentions of economics, and none of sociology or classical studies. The issue of which subjects comprise the social science essential learning area has varied over time. All definitions include history and geography, and some

economics (Knight, 1986; Whitehead, 1974). Over time art history, classical studies and psychology have also variously been claimed to be social sciences within schools.²⁰

The historical development of the sense of identity and community or habitus of social science teachers and the sibling rivalries that have occurred over time were explained by Couling (2005) in his examination of the collective identities of secondary school teachers:

Because of the value they placed on academic education, teachers showed great loyalty to, and respect for, the academic disciplines within which they had trained A major reason for the difficulties social studies had in establishing itself as a subject in its own right after 1945 was the determination of geography and history teachers to guard their disciplinary frontiers from the incursions of 'new' subjects. (p. 31)

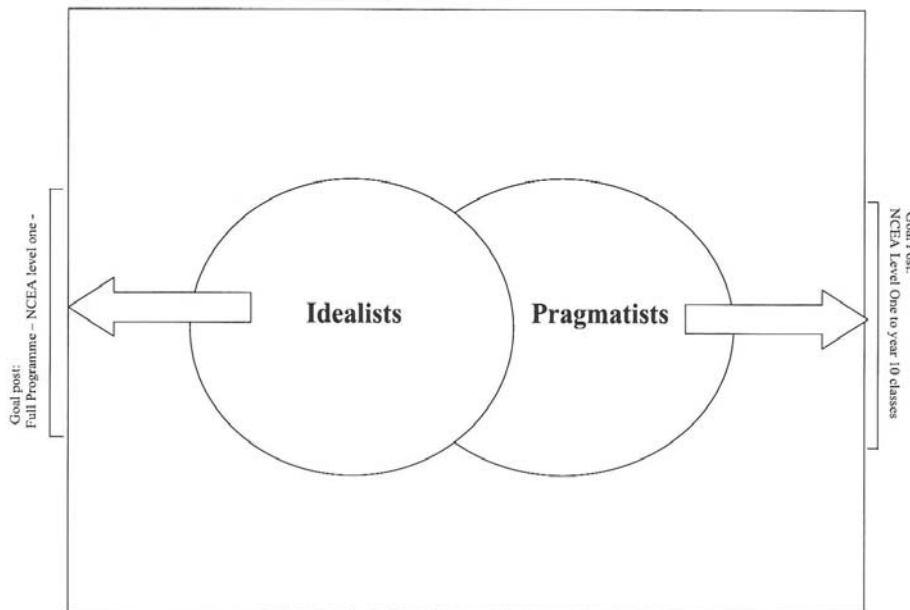
The sibling rivalry expressed here has been on-going source of concern for the social studies community. A questionnaire, conducted by the DoE in 1976 about teachers' reactions to the introduction of non-examinable social studies as a subject in form five, revealed that "teachers of established subjects such as History and Geography felt threatened" (Austin, 1985, p. 23). Reasons for the differential responses to social studies by the component subjects are explored further in chapter four, section 4.3.

To summarise the findings so far, the above discussion demonstrates that the social-field of senior social studies comprises a minority of players who strongly identify as social studies teachers whereas others still define themselves through their parent discipline. Figure 2 overleaf visually reveals a social-field pulled in two directions rather than having a single focus as in Figure 1. On the one hand, teachers with a strong affinity to the integrated subject of social studies tend to aim for the goal of a full programme of NCEA levels one to three, comprising both internally and externally-assessed achievement standards. These are the contemporary pioneers, termed the 'idealists'. On the other hand, another group (the 'pragmatists') have their attention focused on providing NCEA level one

²⁰ Dixon, L., pers. comm., 26.09.07.

social studies achievement standards to some or all of their year ten students. For this team, the overriding aim is still to increase social science numbers in the senior school, especially those in the traditional subjects of history and geography.

FIGURE 2: SOCIAL-FIELD B - IDEALISTS AND PRAGMATISTS



The discussion now turns to a consideration of the professional dispositions of senior social studies teachers.

3.3 PROFESSIONAL DISPOSITIONS

The teachers interviewed during the elite and focus group phases of the research exhibited a high level of professional commitment and responsibility to their students, peers and subject. The postal survey did not elicit such in-depth responses although some respondents volunteered quite detailed personal comments where space was provided or, occasionally, on a separate sheet.

The term 'professional' is highly contested. The traditional or classical approach has been to define the term by providing a list of characteristics (e.g., Beare, 1992)

which focus on criteria about knowledge, autonomy and responsibility (Locke, 2001). For instance, the term 'profession' typically connotes:

... the members of a specialised occupation, a collective of people who come together and share a common interest in the application and development of the body of knowledge that underpins that work. Associated with the concept are issues of control by people over their own work and that of their colleagues. Each profession as part of its own development ... is separated off or classified in some ways from other occupations as it struggles to form its own identity. (Jesson, 1995, p. 189)

In contrast, other approaches regard terms such as 'profession' and 'professional' as relative terms susceptible to different constructions or interpretations according to time, place and context. Instead of an 'ideal', such approaches tend to address professionalism in the context of prevailing political, economic and social ideologies such as the neoliberal economic ideologies of the later 20th century in New Zealand (Locke, 2001).

A number of commentators critiquing outcomes-based education in New Zealand consider that teachers have been deprofessionalised. They argue that teachers' professional autonomy has been diminished or eroded by the constraints of the system that they function within (Brennan, 1993; Hargreaves, 1994; Locke, 2001; Neyland, 2007; O'Neill, 2004; Vossler, 2002, 2006). Accordingly, for example, the introduction of the *NZCF* and the *NCEA* represent managerialist initiatives which reduce teachers' professional autonomy. Therefore teachers' technical interests (Louden, 1991) are seen to consume their work lives, with a dichotomy appearing between the technocratic/reductionist and the professional/contextualist conceptions of teaching (Codd, 1997). The latter conception requires teachers to reflect critically on their practice.

This tension was evident, for example in Vignette 1, where the attention to interpretation of terms, and what would appear at first glance to be technical detail, consumes teachers' lives and lowers their sense of self-efficacy. These teachers' concerns, however, revealed their professional responsibility to their students in mediating between educational policy and practice. They took

seriously their responsibilities to their students in this 'high stakes' (PAR2) assessment and qualifications system.

Teachers' responses to their professional responsibilities towards students with diverse learning abilities and to their junior social studies classes are considered in greater depth in the following section.

3.3.1 CATERING FOR THE NEEDS OF DIVERSE LEARNERS

Normatively, teachers are expected to meet the learning needs of all the students in their classrooms, no matter what their level of ability or disability. Pedagogical practices are claimed to constitute 'quality' teaching when they "facilitate for heterogeneous groups of students their access to information, and ability to engage in curriculum activities and tasks that facilitate learning related to curriculum goals" (Alton-Lee, 2003, p. 1).

When senior social studies was introduced for NCEA in 2002, critics considered it would become a 'dumping ground' for less able students.

... status-hungry schools will continue to select out the more academically able pupils for history/geography options. In the context of NCEA, this may well result in social studies being regarded even more definitively than before as a default course in citizenship obligations for those about to enter the employment market. (Openshaw, 2004, p. 274)

This situation mirrored that of the 1950s and 1960s when Meikle (1961) agonised over what knowledge should be provided for the 'less able' students. She observed that schools were 'bulging' in the late 1950s and 1960s due to the necessity from 1948 onwards for lower ability students to have at least two years of secondary schooling in order to enter trades and the effect of the baby boom on school rolls. She considered that the most able students were not being sufficiently challenged and the less able students needed programmes to suit their needs. School Certificate, she contended, "treated everyone badly except those just above average" (interviewed in Openshaw, 1991, p. 19). A decade later, the non-examinable form 5 social studies developments of the 1970s were

intended to cater for all students, not just those at 'the lower end' (Austin, 1985) although the subject clearly provided "an alternative to School Certificate for lower ability pupils" (p. 25).

Some teachers' responses in this study confirmed their hope or perception that social studies would be a subject suitable for lower ability students. Two schools who responded to the postal survey were offering level one to lower ability year 11 students as was one of the schools represented in the focus group. RES24 noted the hard work of catering for her/his lower ability students while PAR4 noted that she tended to 'mollycoddle' her less able students to help them achieve some success in the internals. PAR4 was teaching some internally assessed achievement standards as well as some related unit standards to a low ability year 11 group.²¹

When INF1 introduced level one social studies in 2002, she had two classes, one a mixed ability class and one a lower ability class. The latter she termed 'my lads'. While INF1 went to a lot of effort to make the topics studied relevant and interesting to her students, and her lads enjoyed the classes, they did not reportedly have the literacy skills to achieve in the examinations. After that first year, therefore, she was not prepared to offer the subject to lower ability students. A tenuous link to Layton's (1972) third stage, whereby "students' attitudes approach passivity and resignation" (p. 11) might be made here.

INF2 had assumed when senior social studies was first introduced that "these students were more from the mid to lower ability, whereas time has moved on, they're gaining a greater range of students." The changing perception of social studies as a 'dumping ground' was also noted "Overall it was considered an easy option and was brought in to cater for struggling students - this of course hasn't been the reality and so some students have left" (RES25).

²¹ The school discontinued this practice from 2007.

In contrast, two teachers from a small rural school reported the vital role senior social studies plays in their school-wide approach. “We have filled a need for mid/ave ability students to achieve achievement standards. We operate a lot on a student self-paced basis where they are empowered to explore and learn” (RES10a & 10b).

Conflicting reasons by the lead educators affirmed why they considered senior social studies to be unsuitable for less able students. The reasons ranged from egocentrism to lack of critical thinking skills to low literacy levels:

They’re too self-focussed and they can’t relate easily to what other people think. They’re the centre of their world at that stage and they’re just not interested ... they haven’t got that complexity of thought patterns. (INF1)

... my boys who have got learning difficulties can still empathise and they can still quite easily see why someone holds a values position but they struggle to articulate it and to do the critical thinking behind why they might have these values. (INF2)

Less able students won’t succeed well in social studies for the simple reason that you need very strong literacy skills because almost all the assessments are essays in the end or paragraphs or written, and so any student who is struggling with the ability to write well will struggle with social studies. Not so much the ideas. I think the ideas will work very well for a huge range of students, the issues that we look at and the way we approach them, but in terms of the final effort, if they have to succeed rather than just doing it for fun, then there seems to me to be a huge requirement for literacy, like all the social sciences. (INF5)

Two of the lead educators, who were no longer classroom teachers, considered that there was no reason why students should not succeed in senior social studies. INF6 claimed “99% of the students should be able to succeed” whilst another contended that it was the professional responsibility of teachers to meet the learning needs of all of their students:

... [teachers need to] work out how to get learners to get meaning from text, how to help them structure their writing, and it’s all of those strategies that are discussed in the *Effective Literacy Strategy* I think that with more tightly focused teaching, in terms of the individual learning needs of the students, it is possible for those students to succeed in the externals. (INF7)

Overall, the clearest conflict between the teachers' narratives related to this issue of whether it was possible for less able students to achieve or not in senior social studies. The high proportion of schools offering level one social studies to their accelerated classes was an indication that it was regarded as a conceptually challenging subject. For example, PAR2 considered that level one social studies was harder than level one history to even reach the 'achieved' level due to the high levels of literacy required and its conceptually challenging nature.

An expert panellist involved in writing the achievement standards in 1999 noted that the standards were not designed to cater just for mixed ability students but also to extend more able students:

The achievement standards were designed to be open-ended, for people to be able to use them in different ways and think through it in different ways Society is a complex place and we shouldn't be trying to simplify it Your better students should be able to see these complexities and the consequences of these complexities.²²

To meet the needs of these students, it was observed that there needed to be a high level of teacher capability. "I still hold to the view that it's a complex subject that reflects a complex world, and therefore you have to have highly skilled teachers involved in supporting the learning of a range of abilities" (INF7).

Relatedly, one participant at a professional development workshop for senior social studies in Wellington in June 2006 attended specifically to ascertain whether to introduce the subject for her school's less able students. The message from the other participants and leaders was that it was a conceptually challenging subject with a high level of literacy skills.²³ The prediction in the early years that senior social studies would become a 'dumping ground' (Openshaw, 2004) was therefore not supported by the data in this study. Teachers displayed professional judgement in appraising reasons for students not achieving in senior social studies.

²² Keown, P. pers.comm., 12.07.05

²³ Researcher Observation, 13.06.06.

The final section in this chapter considers the relationship between the teaching and learning of social studies in the junior secondary school (years 9 and 10) where it comprises a compulsory core subject and social studies in the senior secondary school where it is now a voluntary subject within an already overcrowded curriculum.

3.3.2 TRICKLE EFFECTS

The term 'trickle effects' refers in this study to the productive links between teaching and learning social studies both in the junior secondary school and in the senior secondary school. An assumption is made that a strong junior department will pave the way for the introduction of social studies in the senior school. Conversely, the implementation of senior social studies is assumed to 'trickle down' to create improved practice and outcomes in the junior secondary school. This section focuses in particular upon 'curriculum fidelity' (Alison, 2005) and 'teacher capability' (Meikle, 1994). Curriculum fidelity refers to the level of compliance by teachers to the official curriculum policy documents, whilst teacher capability refers to the knowledge and skills levels of teachers implementing, in this study, senior social studies.

In general, the contemporary pioneers considered that in schools where there was a strong programme in years 9 and 10, there was a strong basis for establishing a senior social studies programme. This 'trickle up' effect was explained thus:

I think if social studies is being done well in the junior school of a secondary school there is more potential for it to grow in the senior school because there's the passion and there's the enthusiasm and there's somebody there who understands the curriculum and can make it dynamic. But if social studies is flat in the junior school, it won't grow.
(INF2)

One teacher identified the 'trickle up' effect clearly. To encourage the link and uptake between junior and senior social studies, RES16 commented "We have

specifically chosen more 'inspirational' teachers in year 10 social studies to encourage students into senior social sciences."

Teachers implementing senior social studies also noted the 'trickle down' effect. The majority of teachers (62%) responded positively to Question 3.3 of the postal survey "*Do you regard your teaching of your junior social studies classes to be better as a result of teaching senior social studies?*" RES16 volunteered "ABSOLUTELY - I can't be forceful enough about this". In contrast, almost one-third (31%) considered there to be no link while 7% did not respond. Other voluntary comments included "Irrelevant - different focus" (RES26b), "I haven't really noticed a difference yet" (RES36) and "No change" (RES30).

Teachers' reasons for the positive 'trickle down' into junior social studies teaching, as reported in the postal survey, focused on their increased focus on and understanding of the *SSiNZC*. Teachers reported greater emphasis on aligning their planning and teaching to curriculum requirements is termed 'curriculum fidelity' (Alison, 2005). From the volunteered, open-ended comments in the survey, the social studies concepts received six mentions, the perspectives seven mentions and processes four mentions. The strongest reasons articulated were teachers gaining a better understanding of the curriculum document: "Working at the senior level helped clarify the curriculum document at junior level; helped with research at junior level" (RES18a) and "The strands & criteria & assessment practices have more meaning" (RES10a). Other reasons included "Can indicate future studies in social areas to students who show particular strengths and interests" (RES20) and teachers as well as students "are better able to see the big picture of where junior social studies can lead" (RES13b). Of concern, however, have been the number of teachers basing their level one social studies programmes on level five curriculum achievement objectives rather than on level six of the curriculum which the achievement standards stipulate (INF1).

One lead educator (also a classroom teacher) candidly expressed her increasing sense of self-efficacy over the time period in relation to the trickle effects:

I was not a good junior social studies teacher ... I was not a social studies focused teacher. I was an English and history teacher ... I hated social studies when I first started having to do it. I mean here you'd get the text book and you'd work your way through I could never see where I was going because there was no sort of scheme, no unit plan. I had no idea about the curriculum document and I think this happens in lots of schools. So once I got into senior social studies and it was really only then that I got into the curriculum document ... now I carry it around 24/7 ... I began to realise that it's a damned good subject and I hadn't been doing it very good. You know, it's four years ago, it's embarrassing, isn't it? (INF1)

Concerns about teacher capability in social studies teaching had been noted for several decades. Meikle (1994) introduced the adage 'anyone can teach social studies' as she recalled her social studies staff at Takapuna Grammar from 1946 until 1959. Her team had variously included the woodwork teacher, the English teacher and the like - in short "anyone could take social studies if only they had a few spare periods in their timetable" (p. 108). Against this, Meikle argued that social studies teachers should have a strong academic background in each of the component subjects.

The often used refrain 'anyone can teach social studies' was also contested by Northover (1980) in relation to the implementation of the *Syllabus Guidelines* (DoE, 1977b):

In every respect the 'new' social studies is a very demanding subject, that requires highly trained and skilful teachers of a mature personality and outlook - and they need a school climate that is in keeping with the aims of back-up services. (p. 16)

The sentiments about teacher capability and the need for specialist staffing have been repeated in response to more recent curriculum developments (Cubitt, 2005) and were reflected in this study by the contemporary pioneers. "I think it is getting harder (in our school) for just 'anyone' to teach social studies without significant up-skilling" (RES6). In a similar vein, RES34 noted "[I] am concerned

about the lack of appropriately trained staff and the flaky and changeable nature of the subject”, while a lead educator observed that:

Senior social studies often throws up gaps in understanding for teachers who for many years taught year 9 and 10 social studies. “So you know I can do that because I’ve taught social studies for years” but having to look closely at the curriculum, and align the assessment with the curriculum I think that for some people that’s a new revelation. (INF7)

The *National School Sampling Survey* (McGee, 2002), published for the MoE (2002) as part of the *New Zealand Curriculum Stocktake* [Stocktake] reported that 75 of the 124 social science teachers surveyed (60%) who taught year 9 to 13 students held a bachelor’s degree in social science, with a further 19% having a master’s degree or higher in social science (McGee, C., 2002, Chapter 7, p. 7). Therefore over one-fifth (21%) of secondary school social science teachers held no formal qualifications in any of the social science subjects at that time. Research has argued that the resultant disadvantages are that some of these teachers continually teach directly from textbooks, or use low level fact learning strategies, rather than actively constructing knowledge with their students (Cubitt, 2005). The teachers’ lack of subject specific knowledge also affects the quality of learning as they lack confidence or the skills to tackle controversial issues (Chapin, 2003; Cubitt, 2005; ERO, 2001), thus diminishing their sense of self-efficacy. At primary school level, ERO (2006) concluded that only one fifth of year 4 and 8 teachers were “effective teachers of social studies” (p.1). Weak experiences of the subject in the primary sector are likely to impact on students’ perceptions of the subject at secondary school. Indeed, inconsistent levels of teacher commitment and capability have been a recurrent theme throughout the history of the subject.

In the following chapters, chapter four and chapter five, teachers’ responses to contemporary social studies curriculum and its assessment are set within the contexts of (i) the contested development of the New Zealand social studies

curriculum since World War Two and (ii) the evolution of standards-based assessment in the social sciences, especially social studies.

3.4 CHAPTER SUMMARY

The focus of this chapter has been the ways in which teachers' personal and professional dispositions have resulted in differing and at times conflicting responses to the implementation of senior social studies as a non-compulsory subject in the senior secondary school. Personal and professional dispositions of the contemporary pioneers have been considered in parallel with the stories of the early pioneers where appropriate.

The personal dispositions encompassed teachers' motivations (missionary zeal), self-efficacy and self-definition. Only a small number of schools and teachers adopted the innovation over the initial five year period. Those teachers who did take advantage of the innovation were termed the 'contemporary pioneers'. Such teachers displayed a high level of enthusiasm for social studies in the senior school but also sounded notes of caution and pragmatism. Table 6 revealed that half of the schools were implementing level one social studies with their year 10 students, while the other half were offering them to year 11 students. These are considered to fall into two camps or teams - the 'idealists' and the 'pragmatists' (Figure 2). Many schools and teachers were early innovators, with 2003 representing the peak year of implementation (Table 7).

The high level of self-efficacy expressed by some teachers, enabling them to take on leadership roles, was tempered by more pragmatic considerations reported by other teachers. Secondary teachers are defined by their academic background. The majority of teachers who implemented senior social studies were geographers, with a much smaller proportion of historians and almost no economists (Table 9). A small proportion had undergone NCEA training solely in social studies (22%) and a similar proportion did not teach any other subjects

in the senior school other than social studies. These form the 'corps of trained specialists' (Layton, 1972).

The notion of professionalism is a contested term. Professional dispositions were considered here within two aspects of teachers' practice - catering for the needs of diverse learners and the trickle effects between the teaching of junior and senior social studies. Classroom teachers in this study were almost unanimous in their opinion that social studies was not a suitable 'dumping ground' for less able students due to the high levels of literacy, critical thinking skills and empathy involved. However, two of the lead educators thought there should be open entry, that all students should be supported to be able to succeed. Approximately two-thirds of teachers considered that their teaching of junior social studies had improved since they introduced senior social studies, whilst a few argued there had been no change. The reasons mainly related to curriculum fidelity. Concerns were also raised about the level of teacher capability in the subject, further dispelling the stereotype that 'anyone can teach social studies'.

The most significant conflicting response in chapter three therefore was the binary between the idealists who were typically offering a full level one to three programme and the pragmatists who were offering only level one social studies, almost half of these at year 10 for extension purposes. The express intention of many teachers in the latter group was to build up numbers in history and geography classes in the senior school. In general geographers were more sympathetic to senior social studies than historians. Another major conflicting response was the high level of self-efficacy beliefs portrayed by some of the contemporary pioneers as opposed to the diminished level reported by others, especially in relation to technical and problematic issues such as interpretation of terms, moderation and resourcing. Strong conflict was aroused by the issue of whether senior social studies was seen as a suitable subject for less academically able students. Whereas classroom teachers generally considered the subject too conceptually challenging, two of the lead educators were adamant that there

should be open entry for all students. The final major conflict was between the number of respondents to the postal survey who reported that teaching social studies had impacted favourably on their teaching of junior social studies (69%) as opposed to the 31% who responded that there had been no such 'trickle' effect.

Chapter four now considers teachers' conflicting responses to the social studies curriculum and its developments over the last six decades in New Zealand.

CHAPTER FOUR: CONTEXTUAL FACTORS I

TEACHERS' RESPONSES TO SOCIAL STUDIES CURRICULUM DEVELOPMENTS OVER TIME

4.1 INTRODUCTION TO CHAPTER FOUR

Ways in which the implementation of senior social studies has reflected historical tensions and conflicts within social studies curriculum developments are the focus of this chapter. Teachers have responded differently to the developments of the social studies curriculum in the New Zealand secondary school over its six decade history.

In this chapter, like the previous one, the data are interwoven with relevant literature that has a socio-historical basis. 'Socio' refers to the division of knowledge into school subjects and is taken from the work of educational sociologists nationally and internationally. 'Historical' relates to commentaries on the infrequent bursts of social studies curriculum developments since the introduction of the subject in New Zealand in 1945. These commentaries provide insights into teachers' responses in implementing social studies in the senior secondary school in the early 21st century.

The chapter contributes to the overall thesis by providing the second of the four combined data and literature chapters. An underlying theme of the chapter is the on-going lowly status of social studies within secondary schools, a status which is theorised using Bernstein's (1971, 1996) classification of knowledge and to a lesser extent Layton's (1972) three stages of a subject's development. Four reasons for this lowly status and its impact on teachers' responses are considered. These include: (i) teachers' conflicting responses to social studies as an integrated subject over four periods of curriculum development (Brain, Reid & Comerford Boyes, 2006); (ii) the on-going sibling rivalry amongst the component 'hard' and 'soft' social science subjects; (iii) teachers' responses to social studies' low level of prescription and focus on conceptual learning; and (iv) teachers' responses to the

four 'traditions' upon which the New Zealand social studies curriculum has historically been based.

Thus the *curriculum* story is told in chapter four. The first part of the chapter considers the context for the low status accorded by teachers to social studies, which is attributed to its inherently integrated nature and purpose. As explained in chapter two, section 2.5.4, in this chapter and the one that follows, the balance between contextual material, and data gathered in the course of this study, is weighted towards the former.

4.2 AN INTEGRATED CURRICULUM

From its inception, social studies was intended to be an integrated subject although this has, in practice, always proved problematic. The *Thomas Report* of 1944 (DoE, 1959) originally recommended that social studies be an integrated compulsory core subject in forms 3 and 4 (now termed years 9 and 10) drawing upon the more traditional social science subjects:

The social studies course itself should be an integrated one, definitely organised around the central theme of the life of man in society We therefore recommend that history, geography and civics (with some changes in content), as well as certain new material derived from first-hand study of community life and from social studies other than those just mentioned, be regarded as one subject, and learned as such. (pp. 28-29)

These recommendations were retrospectively considered "both vague and ambiguous" (Openshaw, Lee & Lee, 1992, p. 184) in that they had two interpretations - one interpretation being a single integrated subject drawing upon components of its contributing disciplines; the other interpretation being an accumulation of separate related subjects.

It is significant, then, that the *Thomas Report* called the subject 'The Social Studies' drawing upon developments of the subject in the USA (Barr, Barth & Shermis, 1977). This title implied two interpretations, "a single, integrated field ... or a series of related disciplines" (Zevin, 2007, p. 5). Another US social studies commentator termed the former 'superordinate' and the latter 'subordinate'

(Kennedy, 1979), although advocates of the single disciplines would not have perceived their subjects to be subordinate to social studies. The on-going confusion between the two interpretations in the USA resulted in the subject's struggle to gain a credible identity over time. "Social studies has an identity crisis. More than most disciplines, social studies has struggled with what it is - or what they are; for part of its confusion is whether it is one thing or many" (Barr, Barth & Shermis, 1977, p. iii).

A similar identity crisis has plagued social studies in New Zealand secondary schools since its inception. Early pioneer Meikle (1960) argued that "We must have a unifying coherent philosophy or our work in the classroom will lack direction, conviction and force" (p.10). The 'nature and purpose' (Barr, 1998) of social studies has been often debated but not clarified nor set in concrete. This lack of a unique identity, such as its own knowledge base, has not really been resolved through the course of several periods of curriculum development (Aitken, 2005a, 2005b; Openshaw, 2004). A timeline of these developments is provided (Appendix I).

Teachers' differing and at times conflicting responses to the four periods of social studies curriculum developments in New Zealand are now described.

4.2.1 THE INITIAL IMPLEMENTATION 1950s-1960s

The initial launch of social studies as a subject invoked a range of responses from teachers, from enthusiastic acceptance by a few early pioneers to strong hostility by many others (Openshaw & Archer, 1992). Ray Fargher noted that social science teachers responded to the new subject in the 1950s by falling into three camps, which he termed 'extremists' and 'conservatives' as well as an 'indeterminant mid-range of the spectrum' (interviewed in Openshaw, 1991):

The 'extremists' at one end of the spectrum ... wanted to create a totally new discipline called social studies which made a total break with the past ... at the other end ... were the 'conservatives' who didn't believe that social studies should exist at all. We should continue to teach history and

geography separately Most people [mid range] saw social studies then as a synthesis of some of the elements of history and geography, but with the emphasis on people. (p.26)

The relative openness of some geographers to social studies, compared to the fierce hostility of the historians at the time, was attributed to the focus of geography (at least at Canterbury University) on 'people' (Herbert, interviewed in Openshaw, 1991, pp. 8-9). Not all geographers were sympathetic to social studies, however, with three high profile geography professors from around New Zealand openly criticising the new subject (Whitehead, 1974). Gorrie (1963) argued that a focus on people was inadequate and that social studies required a greater level of robustness in utilising concepts from geography and history.

The fledgling subject was also considered to be a ragbag of vaguely related activities in time and space:

... I see no sense of continuity ... no sense of sequence, or perspective, and little awareness of causal relationships We see at its worst the disturbing practice of blithely skipping centuries and continents as problems are pursued. (Stone, 1963, p. 28)

Even arch advocate Meikle considered social studies to be "more of an attitude than a subject" (interviewed in Openshaw, 1991, p. 17) and later reflected "whether 'subject' was the correct name for it" (Meikle, 1994, p. 83). She noted that teachers at the 1959 Teacher Refresher Course in Feilding agreed on the concept of the "integration of purpose" of the social science subjects, but that they did not agree on "the integration of matter" [subject content] (1959a, p. 5). The epithets deriding social studies which began this thesis have plagued its entire history. Teachers, however, are pragmatic and "would take an idea and adapt it to make it work ... in a quietly subversive way" (Fargher citing Beeby, interviewed in Openshaw, 1991, p. 27).

The differing responses of teachers to social studies curriculum developments in each of the four time periods is summarised in terms of the typology of teachers' adaptations to policy and practice (Table 10). Fargher's extremists of the 1950s

and 1960s accepted the policy and practice recommended by the *Thomas Report* by implementing social studies as an integrated subject to the best of their ability and the support available at the time. At the other end of the continuum, the conservatives rejected both the policy and the practice, continuing to teach history and geography as if the *Thomas Report* had not been published. The indeterminate mid-range did shift their focus to 'people' thereby accepting the policy but continued the practice of teaching social studies as history and geography, and therefore would be termed ritualists (Table 10).

4.2.2 1970s SYLLABUS DEVELOPMENTS

It was three decades after the *Thomas Report* before the next phase of curriculum developments for secondary school social studies occurred. Considerable input from teachers and other educators, especially through the National Social Studies Syllabus Committee, contributed to the first integrated *Syllabus Guidelines* (DoE, 1977b) based around themes and important ideas according to the work of US advocate Hilda Taba (Aitken, 2005a; Keen, 1979; Lewis, 1980). The first mandated document for social studies had been the *Syllabus for Primary Schools* (DoE, 1961) which contained only two pages that related to secondary social studies education.

The *Syllabus Guidelines* were thus well overdue and provided key themes which focused study at each of the four year levels. The original brief to the Committee in 1969 was to draft a syllabus for forms 1 to 5, "... but it concentrated on Forms 1-4" (Austin, 1985, p. 23). The themes of social control at form 3 and social change at form 4 were to be followed by the major theme of power and influence at form 5, with additional themes of social action and inequalities recommended (Austin, 1985). The themes adopted in the 1970s for year 11 social studies are still relevant for senior social studies in the early 21st century.

Subsequently, the *Social Studies Forms 3 and 4: A Handbook for Teachers* [Handbook] (MoE, 1991) was published to update and provide guidance to illuminate the

Syllabus Guidelines of the 1970s. Primary teachers had been provided the *Faces* (DoE, 1986) documents for this purpose. The *Handbook* provided clearer guidance and a higher level of prescription than previously experienced. The utility of the *Handbook* was increased by being written in language teachers could understand which was reported to be highly regarded by secondary school teachers, as was the professional development which accompanied it (ERO, 2001; Murrow & Bennie, 1993).

Teachers' responses to the *Syllabus Guidelines*, as reported earlier, represented a normal curve of distribution ranging from enthusiastic acceptance to strong opposition with a 'silent middling group' (Northover, 1980). In terms of Brain and colleagues' typology, the teachers who responded with enthusiastic acceptance could be termed the conformists, while the strong opponents would be regarded as in a state of retreatism or rebellion. The silent middling group, like Fargher's mid-range indeterminants of previous decades, would be termed ritualists, rejecting the policy of the new document but accepting its practice especially once the *Handbook* had been produced (Table 10). Even though neither the *Syllabus Guidelines* nor the *Handbook* were officially mandated, both were enthusiastically accepted by a group of 'conformists'.

The *Handbook* was just gaining acceptance, however, when the 1990s curriculum battles began.

4.2.3 1990s CURRICULUM DEVELOPMENTS

Less than two decades after the *Syllabus* developments, the highly contested curriculum developments throughout the 1990s similarly attracted a wide range of responses from teachers. A battle was waged between those who promoted an integrated curriculum based on social justice principles – the social democrats – and the neo-conservatives who preferred to retain the perceived academic rigour of the traditional discrete social science subjects (Beals, 2001; Benson & Openshaw, 1997; Hunter & Keown, 2001; Mutch, 1998; Sullivan, 2001). Writing

of the first draft (MoE, 1994) proceeded along a social-constructivist pathway involving a large number of social studies educators but it still attracted a raft of submissions and comment in the media,²⁴ with a particularly strong rebuttal from the Education Forum, the education arm of the New Zealand Business Roundtable. The second draft of the curriculum, written by one person within the MoE, also attracted a range of submissions and comment in the media. A group of social studies educators from The University of Waikato hurriedly produced the subject's first ever *Position Paper* (Barr, Graham, Hunter, Keown & McGee, 1997) in response which, in turn, was soon followed by the final and hastily put together *SSiNZC* (MoE, 1997).

Integration of the discrete subjects was provided by establishing five knowledge strands, based on practice in two states of Australia and to a lesser extent in the UK (Ferguson, 2002). These strands supposedly represented the discrete social science subjects but actually increased the ire and intransigence from the component subject communities.

Opposition to the practice of curriculum integration has not been confined to New Zealand. For example, Canadian commentator Hargreaves (1994) noted that "Conventional secondary schools which attempt curriculum integration or cross-curricular links constantly run up against such territorial defensiveness among their subject departments" (p. 62). Territorial defensiveness has been characteristic of the social sciences throughout social studies history.

In terms of terms of Brain and colleagues' typology, the social democrats could be termed the conformists whilst the neo-conservatives would be placed at the other end of the continuum, strongly rejecting the *SSiNZC* and continuing to teach social studies in traditional ways with a strong underpinning of history and geography. Teachers who partially implemented *SSiNZC* in the spirit that was intended would fall within the middle categories (Table 10).

²⁴ For example, A.M. Brook, *A Crippled Curriculum*, The Dominion 27.10.1995.

4.2.4 21st CENTURY DEVELOPMENTS

The introduction of senior social studies for the NCEA since 2002 has attracted a similar range of responses from teachers. It is an optional subject, however, rather than a compulsory one. The idealists identified within chapter three could now reasonably be considered the conformists in that they willingly accepted the challenge both of the policy and the practice and have generally implemented the subject at all three levels in their schools. At the other end of the continuum, teachers who have opted not to introduce senior social studies have rejected both the policy and the practice (rebellion). The pragmatists, who have generally introduced senior social studies at level one, and this frequently to accelerate their accelerated year 10 classes, might be termed ritualists – they have accepted the practice for their own and/or their students' ends but rejected the policy of full implementation.

During the study period, the *CMP* was underway, as a recommendation of the *Stocktake Report* (MoE, 2002) which advocated that the *NZCF* be 'reduced, reframed and revitalised' (Cubitt, 2005). Discussions at the social sciences hui in late November 2003, which commenced the *CMP* for this essential learning area, deliberately encouraged the economists, historians, geographers and social studies advocates to share ideas and celebrate their similarities. The resulting publication of the *New Zealand Curriculum [NZC]* draft and final documents (MoE, 2006b, 2007), which occurred only one decade after *SSiNZC*, took into account submissions from these component groups who also wished to retain their subject integrity.

TABLE 10: SUMMARY OF TEACHERS' RESPONSES TO SOCIAL STUDIES CURRICULUM & ASSESSMENT DEVELOPMENTS OVER TIME

	Conformity	Innovation	Ritualism	Retreatism	Rebellion
Brain, Reid & Comerford Boyes	Accept policy Accept practice	Accept policy Reject practice	Reject policy Accept practice	Reject policy Reject practice	Reject/ substitute policy Reject/ substitute practice
Early pioneers 1950s (Fargher)	Extremists		Mid Range, indeterminants		Conservatives
<i>Syllabus Guidelines</i> (Northover)	Enthusiastic acceptance		Large middling group		Strong opponents
SSiNZC Curriculum Developments 1990s	Social Democrats				Neo Conservatives
Senior social studies 2002-2006	Idealists Level 1-3		Pragmatists Level 1 Accelerated/ Internals year 10		Traditionalists Retain traditional subjects
Classification of knowledge (Bernstein)	'Soft' subjects Non insulated Open relation to other subjects		Grudging implementers		'Hard' subjects Strongly insulated

In conclusion, the above table reveals a normal curve of distribution of teachers' responses to social studies curriculum developments over time. The historical tensions have invoked a range of conflicting responses by teachers over each period of curriculum change. Whilst this categorisation might oversimplify teachers' responses to change, and in fact some teachers might simply misunderstand or misconstrue the curriculum change, a pattern has emerged. The experience of senior social studies in the early 21st century supports the range of responses experienced by teachers during previous periods of curriculum changes.

The on-going territorial defensiveness amongst the social science subjects may partly be explained through an understanding of how knowledge in secondary schools is typically classified. This is the focus of the next section.

4.2.5 THE CLASSIFICATION OF KNOWLEDGE

The territorial disputes within the social sciences in New Zealand secondary schools, elaborated in section 4.3, may be explained by reference to Bernstein's (1971, 1996) concept of the classification of knowledge. Within the social sciences there are both 'hard' and 'soft' subjects. History and geography, with their emphases on things temporal and spatial respectively, have until recently been considered clearly delineated with strong impermeable boundaries (Appendix N). They are 'hard' subjects in Bernstein's terms. In contrast, social studies is deemed to have blurred or permeable boundaries. The tendency of social studies to pick from a range of contexts leads to it appearing to be a 'ragbag' of 'everything and nothing' to its critics. It has therefore been termed a 'soft' subject, sometimes also termed 'liberal studies' (Austin, 1985).

Two further distinctions are made. Social studies deals with the "commonsense, everyday community knowledge of the pupil, his family and peer group" (Bernstein, 1971, p. 58) as opposed to the more specialised "uncommonsense, educational knowledge" (p. 58) of 'hard' subjects. The more lowly status of the commonsense knowledge was later noted by Paechter (2000) within the context of issues of power-knowledge in classroom relationships. Bernstein (1971) further posited that subjects like social studies which tend to stand in open relationship with each could be termed "integration codes" (p. 49). Later he referred to such subjects as 'regions'. "Regions are the interface between [tightly bounded] disciplines (singulars) and technologies increasing regionalisation necessarily is the weakening of the classification [codes]" (Bernstein, 1996, pp. 65-66). This is particularly relevant to the recent development of course innovation (chapter five, section 5.3.2) made possible by the introduction of the NCEA in the senior secondary school in New Zealand.

Hard subjects are traditionally accorded academic status in secondary schools, with the assumption that they are rigorous and challenging for students. The hierarchy in the status of subjects "is based upon assumptions that certain

subjects, the so-called 'academic' subjects, are suitable for the 'able' students, whilst other subjects are not" (Goodson & Marsh, 1996, p. 45). Soft subjects, in contrast, are considered to be less credible, second-tier, more undesirable options. Hard subjects tend to be highly prescribed and have strong traditions in a parent university discipline. Soft subjects, like social studies, are less prescribed and may lack a direct link to a university subject.

The internal logic and discipline of subject matter, a descriptor from Layton's (1972) second stage, is addressed in the next section in relation to the need for an integrating theme in social studies.

4.2.6 AN INTEGRATING THEME

An integrated subject requires an integrating or unifying theme. In the 1950s, the central theme for the new subject social studies in New Zealand was "the life of man in society" (DoE, 1959, p. 28). In the USA, the two major integrating themes were historical topics and 'problem topics' (Barr, Barth & Shermis, 1977). These themes have also been prevalent over time in New Zealand with historians promoting studies of people's participation in historical events while geographers were more likely to engage in 'problem topics' such as poverty and land reform (Gorrie, 1963; Openshaw, Lee & Lee, 1993).

One of the struggles for senior social studies over its initial five years of implementation for the NCEA has been to clarify just such an integrating or unifying theme. The data in this study provided evidence that teachers were moving towards topics which had a social justice focus and contemporary relevance. These contexts could be at a local, national, regional or global scale. The parent discipline of a teacher tended to influence the contexts that were selected in the early years. For example, within the focus group for this study (phase two) the issue of a tourist lodge on Kapiti Island was evocative of a geographic issue while a study of Parihaka was evocative of a history topic. The

use of traditional geography and history topics for senior social studies created tensions for teachers when it came to the externally-assessed examinations.

Contexts for AS90218 *Examine differing values positions* showed an emphasis on social justice issues on a global scale such as resource use in Antarctica, globalisation/rationalisation (Macdonaldisation), child labour, landmines and HIV/Aids. The latter two are also studied as contemporary issues in geography at level two. Topics with an historical focus included women’s suffrage, civil rights issues in USA (e.g., Rosa Parks), and the Springbok Tour. In all, a rather disparate list of contexts is revealed in Table 11, below and overleaf.

TABLE 11: CONTEXTS RESPONDENTS USED FOR STUDYING AS90218 **N=58**

	<i>Context</i>	<i>Number</i>	<i>Percentage</i>
Global Social Issues	Rationalisation/Globalisation <i>- <u>McDonaldisation/Mighty Mall</u></i> ²⁵	19	33
	Conflict over scarce resources- <i><u>Antarctica</u>;</i> <i>Whaling</i>	8 1	14 2
	Human Rights- <i>Child Labour</i> <i>Death Penalty</i>	3 2	5 3
	Genetic Engineering - <i><u>Getting into Genes</u></i>	1	2
	The viability of small nation states - <i><u>Tokelau</u></i>	1	2
	Impact of conflict - <i>Landmines;</i> <i>Israeli West bank barrier</i>	1 1	2 2
	Pandemics- <i>HIV/Aids</i>	1	2
	Women’s Suffrage	1	2
	Civil Rights- <i>Rosa Parks;</i> <i>Women’s Suffrage</i>	1 1	2 2
	National Social Issues		
Legal Issues - <i>Alcohol Laws;</i> <i>Smacking Legislation</i>		3 1	5 2

²⁵ Terms italicised and underlined denote SSoL units or topics as identified by respondents. PAR2 noted that had it not been for the SSoL units, an “even more disparate range” of topics would have been likely.

	Bicultural issues: <i>Foreshore & Seabed;</i> <i>Kapiti Island Land Use</i>	3 1	5 2
	Resource perception- <i>How & why people value places</i> <i>and things</i>	2	3
	Resource Protection- <i>Environmental Ed</i>	1	2
	Impact of change on people's lives in NZ- <i>Migration;</i> <i>1960s</i>	1 1	2 2
Nil response		4	7

Source: Phase Three: Postal Survey, Question 4.1.

Participants in the focus group (phase two) struggled with suitable contexts for study, becoming aware over the study period that a historical or geographic topic on its own was not preparing their students for success in the external examinations. In Louden's (1991) schema, this was one of the more problematic interests for teachers. These teachers identified the need for a check list or other means to evaluate the suitability of contexts selected. By the end of the study period, an acknowledgement of the importance of contexts with a social justice focus at a local, national and/or global scale was becoming evident in the study data. Thus 'problem' topics (often with their historical background) were becoming the integrating or unifying theme which acknowledged the parent disciplines but also provided social studies with a clearer focus and identity. The relevance of the study to students living in New Zealand in the 21st century was regarded as vital to good social studies (INF7). Such relevance had been advocated two decades earlier by John Buckland (1982) who accurately predicted social changes which would impact on students in social studies classes.

4.2.7 STRATEGIES FOR INTEGRATION

Internationally, curriculum integration was advocated by John Dewey in the early 20th century and by the end of that century a number of advocates offered models and strategies for integration (e.g., Fogarty, 1991; Fraser, 2000; Kysilka, 1998). Yet, throughout the sixty year history of New Zealand social studies, there

has been little evidence of any literature providing guidance or strategies to teachers about the 'hybrid nature' of the subject (McGee & McGee, 1992). In the early years Harry Evison (1963) requested "a handbook, textbook, or even a post-primary bulletin to show the ordinary teacher how it can be done". He concluded:

It seems to me that our New Zealand social studies starts with the false premise that history and geography can be profitably integrated, and goes on to erect a fallacious and complicated syllabus without making any serious attempt to show how to make it work. (p. 25)

Thirty-five years later, Judy McGee (1998) warned that:

If social studies is to succeed as an integrated subject then the purpose of teaching the subject should not be stated in such abstract terms as to make it virtually impossible for curriculum planners to plan and teachers to understand and implement. (p. 57)

Between the expression of the two concerns above, Bruce Farthing and Ian Lawson (1986) produced a very short but practical set of guidelines for integrating the social sciences in secondary schools in light of new curriculum developments they predicted for the 21st century.

In my research for this thesis very little empirical evidence about teachers' responses to social studies as an integrated subject was gathered. This was due to there being very little in the social studies literature about its integrated nature. On reflection, however, I now consider teachers' acceptance or opposition to the integrated nature of the curriculum to be fundamental to the fluctuating fortunes of social studies' implementation during its history and to its success in the senior school.

The underlying reasons for teachers' varying responses to social studies curriculum developments over time may be explained by the 'sibling rivalry' between the component subjects over the sixty year history of social studies, which is the focus of the next section.

4.3 ON-GOING SIBLING RIVALRY

Social studies as a new subject in the compulsory core curriculum in secondary schools in New Zealand encountered a turbulent history from the outset. Enmity arose from the component social science disciplines while “encouraging schisms amongst its [social studies] erstwhile supporters” (Openshaw, Lee & Lee, 1993, p. 184). Such contestation and struggle are not unique to New Zealand social studies, with commentators noting that school subjects involve competing interest groups fighting for resources and academic status (Goodson, 1988; O’Neill, 2004; Openshaw & Archer, 1992). The combatants in such struggles over curricula include not only those “external to education such as governments, politicians, bureaucracies and businesses, but also those regarded as internal to education such as curriculum reformers, syllabus designers, pressure groups, teachers, parents and students” (O’Neill, 2004, p. 26).

The concept of sibling rivalry, emanating from secondary school teachers’ strong identification with their parent discipline, was introduced in chapter three. As previously noted, teachers of history and geography already had a strong subject identity, especially the historians (Couling, 2005; Keen, 1979) although these subjects were both relatively new in the New Zealand curriculum (Openshaw, Lee & Lee, 1993).

Graeme Aitken (2005b) observed that the *Syllabus Guidelines* shifted social studies further from history and geography than had the recommendations of the *Thomas Report*:

... but it failed to 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. (p. 90)

The struggles for power between the various interest groups, whether teachers within school social science departments or the wider divisions of social-democrats and neo-conservatives contesting curriculum developments in the 1990s, may be likened to the ‘field of forces’ within social-field theory. The

traditional 'hard' senior subjects have been privileged compared to the 'softer' social studies because of their longer history and more tightly prescribed contents. In terms of Louden's (1991) interests of reflection, introduced in chapter two, section 2.5.3.3, issues of status are problematic for teachers, especially those who feel threatened. Battle lines have most strongly been drawn by the historians (Sheehan, 2008), whose relationship with social studies is now considered.

4.3.1 HISTORY & SOCIAL STUDIES

The long standing antipathy by a number of historians to social studies has been attributed to differences of philosophical perspective between the two subjects (Keen, 1979; Sheehan, 2007). David Keen's research considered the irreconcilability of the differing approaches of history and social studies. The former, he contended, was epistemologically (knowledge) based whereas the latter drew upon the psychological-developmental approach advocated by Hilda Taba in the USA.

Thirty years later, Mark Sheehan (2007) argued the difference to be that historians traditionally examine evidence from the past to explain events whereas social studies has taken more of a 'presentist' stance, examining past events from the perspective of the present. The on-going antipathy to social studies by some historians was further explored by Sheehan (2008) in his doctoral thesis:

While it is unremarkable that social studies initially encountered hostility by the history teaching community when it was first introduced (as it supplanted the territory traditionally held by history specialists), the extent and longstanding nature of the rift between these two subject communities is unusual. (p. 136)

Further, Sheehan (2007) noted that the distancing of the historians from social studies curriculum developments over the decades had been detrimental to both groups.

While historians have traditionally tended to adopt a chronological approach to their studies, different approaches have recently been adopted. For example, US

historian, Keith Barton, argued for a more thematic approach, starting with a contemporary issue and working backward to discover the genesis of the issue (Barton, 2007). This approach was reported by PAR2 in approaching Treaty of Waitangi issues.

Current and former history teachers (Harrison, 1998; Low-Beer, 1986; Peachey, 2005; Sheehan, 2007; Shuker, 1992; Simon, 1992; White, 2005) have continued to criticise social studies for the lack of rigour of the history taught within the integrated subject. In Brain and colleagues' typology, they fall into the retreatist or rebellion categories. Their concerns include the lack of chronology, the limited knowledge of New Zealand history and encouragement of 'social amnesia' (Harrison, 1998; Simon, 1992). Their concerns reflect the antipathy of some historians noted in the early years of social studies (Couling, 2005; Meikle, 1994). An extreme position was expressed by Jackie White (2005):

My concern is that, while other subjects have been allowed to remain true to their essence, school history has fallen captive to the social imperatives that drive the social studies curriculum. My contention is that history needs to be divorced from social studies. Like most of you, I went teaching because I have a commitment to our discipline. I went teaching because, like the maths teacher who teaches maths to years 9 and year 13 students alike, I believe that students at all levels should be studying pure history. I am not a social worker, I am not a priest, I am not somebody's mother, I disapprove of the concept that history teachers have a role in social engineering. As historians, our task should not be to create well socialised citizens. (p. 9)

White's views may be understood within the terms of Bernstein's classification of knowledge, especially the relatively closed boundaries of history; and in terms of Loudén's (1991) personal interests. Similar comments to White's were expressed by Alan Peachey (2005), a former influential secondary school principal and now a Member of Parliament, who questioned "why [do] we continue to be so obsessed with this Treaty of Waitangi nonsense ... and fiddle around with social studies?" (pp. 143 - 144).

Evidence of territoriality appeared in the voluntary comments returned in the postal survey. For example, RES 37, in response to question 7.1 “*What are the prospects for senior social studies in your school over the next five years?*” commented “May do one or two units [achievement standards] at level one but it is important to promote history and geography at levels 1, 2 & 3. History growing fast but geography declining.”

A major factor in the opposition of the history teachers’ community to *SSiNZC* was the concern that the discrete social science subjects were marginalised by not being specifically mentioned, except at the end of the essence statement of the *NZCF* (MoE, 1993, p.14). Moreover, the knowledge strand title and achievement objectives of *SSiNZC* (MoE, 1997) to represent history – *Time, Continuity & Change* – was not seen to represent the integrity of the subject. Further, historians considered that their subject was not taught robustly. Since the study period the New Zealand History Teachers’ Association [NZHTA], has been actively lobbying the MoE for a second-tier curriculum review to update their 1980s syllabus.²⁶

The data from the postal survey (phase three) revealed that a relatively low proportion of teachers who implemented senior social studies had history as their parent discipline, undertook their NCEA training in history or also taught that subject (Table 9).

4.3.2 GEOGRAPHY & SOCIAL STUDIES

Geography has also been regarded as a hard, tightly bounded subject. Early writings on the teaching of geography within social studies emphasised the importance of learning geographic ‘skills through drills’ (Ross, 1959) and a ‘capes and bays’ highly descriptive and prescriptive approach (Gorrie, 1964). Gorrie’s contention was that more able students should study traditional geographic

²⁶ www.nzhta.org.nz/Linked%20Items/History%20CR%20report.pdf; See also postscript, chapter eight, section 8.7; Appendix N.

topics, whilst less able students should study 'problem topics' like land reform and poverty. In the 1970s form five social studies development, 'inequalities' was promoted as a topic (Austin, 1985) which is also a popular topic in geography. 'Problem topics' have in reality become the preserve of social studies as well as geography.

While the geographers have not been as vociferous in their opposition to social studies as the historians, neither have they been entirely accepting. During the 1990s period of social studies curriculum developments a number of geographers requested a review of the outdated *Syllabus for Schools - Geography - Forms 5-7* (MoE, 1990) and considered opportunities for the subject which were not realised by SSiNZC (Bailey, 1998; Stirling, 1998). Volume 106 of *The New Zealand Journal of Geography* was entirely devoted to this issue. Similarly, enthusiasm was expressed by geographers (e.g., Baldwin & Papprell, 2006; McPherson & Keown, 2004) about opportunities for the subject within 21st century curriculum developments. Yet, despite drafting a *Position Paper on Geography* (Keown, Aitken, Nairn & Fastier, 1999) the subject community has not lobbied the MoE for a second tier review in the way that the historians have. The geographers, like the historians, did not consider that the strand title and achievement objectives for geography in SSiNZC - *Place & Environment* - truly reflected the intent or integrity of their subject, nor that geographic concepts and skills have been taught robustly.

The lower level of antagonism between geography and social studies in the early years may be explained in part by the shared interest in 'problem topics' and the focus on people in some university geography departments. The emphasis on contemporary geographic issues within the internally assessed component of the *Geography Syllabus* was introduced from 1986. As has already been noted, a number of resources recently published for use in geography are on topics/contexts also studied in senior social studies (e.g., Land Mines, HIV/Aids). The opportunities opened up by NCEA for mixed courses

incorporating achievement standards from a range of subjects (that is, course-based rather than subject-based) have been recognised as an opportunity for the geography community (Baldwin & Papprell, 2006). This is developed further in chapter five, section 5.3.2.

The study revealed that a greater proportion of geographers (43.5%) implemented senior social studies than historians (Table 9). Whether this was due to greater synergies between the subjects or to the declining numbers of students opting for geography would also be worthy of further research (chapter eight, section 8.4.2).

4.3.3 ECONOMICS & SOCIAL STUDIES

The role of economics within social studies is also less well reviewed in the literature, but it is clear that the commerce community felt particularly alienated by the 1990s curriculum developments. Unlike the websites of the geographers and historians, the economics teachers' website is closed to non members and there is no New Zealand professional publication for teachers of economics.

Economics formally became part of the social sciences essential learning area with the development of *SSiNZC*. Aitken (2005b) noted in relation to the *New Zealand Curriculum (NZC)* (MoE, 2007) developments a decade later:

The suspicion with which economics has historically been regarded is addressed in the proposed essence statement While this reference may be too obscure for most teachers without a background in economics, its presence in the essence statement ... 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. (pp. 221 - 222)

In the recent curriculum developments, the economics community was successful in changing the title of the strand from *Resources and Economic Activities* (MoE, 1997) to *The Economic World* (MoE, 2007). Some of the topics studied by teachers of AS90218 *Examine differing values positions* had a focus on resource use, such as

conflict over scarce resources (Antarctica, whaling), resource perception and the viability of small nation states (Tokelaus) (Table 11).

There was very little evidence in this study of economists being involved in teaching senior social studies. Only one respondent to the postal survey and one member of the focus group indicated some background in economics.

The relationship between social studies and a fourth subject that has had a lower profile in secondary schools in New Zealand – sociology – is now discussed.

4.3.4 SOCIOLOGY & SOCIAL STUDIES

Sociology has not always been officially regarded as part of social studies but the strand in *SSiNZC* (MoE, 1997) – *Social Organisation* – represented a strong basis in the discipline. Earlier, during the development of the *Syllabus Guidelines*: (DoE, 1977b), members of the working party National Social Studies Syllabus Committee had a strong bias towards sociology (Lewis, 1980). Other authors have noted the similarities between social studies and sociology (e.g., Childs, 2004; Low-Beer, 1986).

The naming of the social studies has consequently been problematic, with PAR1 reporting that her department discussed a possible name change at the start of every year. Roger Childs (2004) advocated that social studies from years 11 to 13 be renamed sociology. This renaming would, he argued, provide senior social studies with a distinctive status and a pathway towards study towards the recognised university subject sociology. A paper written for the MoE on the naming of the subject suggested the name ‘Society’ (Sinnema, 2004) though this name has not been adopted. The executive of ANZFSSA volunteered to help write sociology unit standards in 1996, such was their interest in this subject.²⁷

²⁷ Letter to MoE from ANZFSSA President Paul Keown, 04.07.1996.

Similarities between senior social studies and sociology include a shared theoretical base and pedagogies which rely on discussion and debate. Senior social studies has more of a focus on social justice issues, ideologies and policies, however, whereas the focus of sociology considers the roles of institutions and systems which facilitate the operation of society. In this study, INF7 considered that senior social studies could draw more from sociology, but that each subject had its own integrity which should be respected. She did not consider that senior social studies should be renamed sociology.

A minority of schools acknowledged sociology in the postal survey. Two schools indicated that they offered both social studies achievement standards and sociology unit standards (there are no achievement standards offered in sociology). RES36 noted that the school offered level one social studies to year 11, but sociology unit standards in year 12 and 13. Lead educators INF2 and INF5 commented that two schools who had changed from sociology to senior social studies were 'very good' at it due to their social constructivist pedagogical approaches once they had adapted to the curriculum requirements.

There is potential to forge stronger links between senior social studies and sociology in the future. Recent developments concerning the relationship between sociology and senior social studies are considered in the postscript, chapter eight (section 8.7.2).

The above discussion (section 4.3) demonstrates that social studies advocates have struggled against the forces in the field, especially their traditionally stronger foes historians and to a lesser extent the geographers. The economists have distanced themselves from the battle. The discrete social science subjects have wished to retain the integrity of their disciplines. Meanwhile social studies has struggled to carve out a niche of its own. In the early 21st century, however, the process of 'regionalisation' (Bernstein, 1996) of formerly strongly classified subjects has gathered pace as discussed in chapter five (section 5.3.2).

The third reason for the low status of social studies compared to its social science siblings - that of the relative lack of prescription of the social studies curriculum - is now considered.

4.4 A CONCEPTUAL CURRICULUM

Social studies has been characterised throughout its history by a low level of prescription including an emphasis on conceptual learning. As indicated in chapter one, critics of social studies in New Zealand since its inception have denounced the subject as trying to achieve too much and lacking coherence. Similarly in the UK in the 1970s, Dennis Lawton (1975) contended that the content of social studies was “unstructured, unsystematic and undisciplined” and that some sequence and structure was needed “in order to learn about man [sic] if we are not to accumulate a mere collection of bits of disconnected information” (p. 77). During the same decade in the USA, Kennedy (1979) argued that the epistemology of the social studies was in practice defined by what was being taught in the classroom rather than what was being contested in theory.

The lack of a clearly defined body of knowledge for social studies has been regarded as both a strength and a weakness of the subject in New Zealand. In terms of the latter, Aitken (2005a) posited that “One of the most persistent challenges the subject has faced is that it does not have a commonly agreed distinctive purpose and an associated knowledge base” (p. 85).

Such criticisms have been consistent over time. Evison (1963), for example, argued that the aims of social studies were “too wide, too vague, too superficial” (p. 23) while, 35 years later, Tanya Wendt Samu (1998) claimed that “a major cause of the subject’s marginalisation has been curriculum statements which are dated, too broad and imprecise” (p. 65). The same criticisms were voiced for primary school social studies (Smythe, 1998). Meikle noted that social studies was more about aim and method than about content (interviewed in Openshaw, 1991). The low level of prescription and concomitant “accent on freedom for

teachers, allegedly [*The Thomas Report's*] greatest strength, [paradoxically] has proved to be its greatest shortcoming" (Whitehead, 1974, p. 62). The failure to convey a unique purpose has resulted in the inability of social studies to gain academic credibility in an already overcrowded senior secondary school curriculum (Milligan, 2006). It has been argued that a higher level of prescription could address concerns about teacher capability in social studies (Aitken, 2005b).

The authors of the *Position Paper* (Barr, Graham, Hunter, Keown & McGee, 1997) identified ten points of justification for the inclusion of social studies as a subject in the school curriculum. On the one hand, they stated that "social studies should have a curriculum design and structure which is systematic, sequential and coherent" (p. 13). On the other hand, they argued that "social studies teaches a selected body of knowledge from the vast knowledge base of the disciplinary fields of the social sciences and humanities" (p. 13). Failure "to agree on the parameters of the new subject" (Openshaw, Lee & Lee, 1993, p. 185) in the early years comprises one of the unresolved tensions (Keen, 1979; Openshaw, 2004) which has continued to plague the 'ad hoc and piecemeal' (Openshaw, 2004) curriculum developments over its sixty year history.

The 'blurred boundaries' of social studies results from its lack of prescription. Traditionally the discrete social science subjects have had very tightly prescribed syllabi which have provided them each with a distinct identity (although this has weakened with the growth in internally-assessed components since the mid 1980s). In contrast, the social studies curriculum has tended to focus on concepts rather than content (Milligan, 2006).

The lack of prescription has long created a major tension between social studies and the discrete social science subjects. Originally based on 'important ideas', the work of American Hilda Taba was influential in New Zealand social studies developments, especially the *Syllabus Guidelines* (DoE, 1977b) as has already been noted. Taba was a developmentalist, drawing upon the works of Jerome Bruner

and Jean Piaget (Keen, 1979), who considered students would achieve self-actualisation through understanding concepts rather than memorising facts and figures. The emphasis on understanding key concepts within a range of contexts rather than adhering to a prescribed list of topics was formalised during the 1990s developments of *SSiNZC* and has continued into the 21st century in the *NZC* (MoE, 2007). A conceptual curriculum emphasises the importance of higher levels of understanding (as in Bloom's Taxonomy) over the accumulation of facts and figures (Barr, 1998). The publication of support documents for social studies during 2008 called *Building Conceptual Understandings in the Social Sciences* underscored this emphasis on conceptual learning (postscript, section 8.7.1).

Teachers interviewed in the élite and focus group interviews (phase one and two) in this study responded very positively to the relatively low level of prescription of senior social studies. For example, PAR4 commented that she liked the flexibility and opportunity to link to students' interests, such as the V8 car race issue and boy racers. On the other side of the coin, PAR1 noted that the prescription of geography was too constraining. One respondent to the postal survey who identified as a Beacon Schools teacher clearly wished, however, to have a higher level of prescription and clearer epistemology, stating "I would like to work on developing a 'body of knowledge' for senior social studies" (RES22).

The concepts can provide a guide to teachers who are anxious to provide suitable social studies contexts. For example, INF5 explained that for a context such as the 2004 Boxing Day tsunami:

One of the key ways I give my teachers to analyse [a context] is - you look for key words [concepts] like responses, participation, consequences, change, words like that. That is where we get the social studies in and participation to me is strongly embedded in how we do social studies. So the tsunami on Boxing Day becomes a social studies topic when we look at the responses of people to it, the responses locally, globally, internationally, within the nation, in their communities.

The value of the conceptual approach to senior social studies was described by INF2 in Vignette 2, below. She explained how she teaches conceptually and the benefits of this, such as students being able to transfer the knowledge to other contexts:

VIGNETTE 2: A CONCEPTUAL CURRICULUM – IDEAS & ACTIONS

We don't really have topics any more. We teach really conceptually. Our units are named after the [concepts in the] achievement objectives (AOs) but not after the AOs. So for example we look at how ideas and actions are experienced by people [and] there is change over time. We actually look at Nazi Germany and the ideas and actions of Hitler and the Nazi party. And we look at ideas and views from pre or post-World War One essentially. We look through to the present day and we look at some testimony from Jewish people about how they feel now about the ideas and actions of Hitler as well. But our unit is focused on ideas and actions. At the moment we use that [Hitler] as our content but it has the ability to use that as a context. We could swing it against anything else that is happening. And at the same time that I was teaching that unit, I was pulling in issues, current things, or ideas and actions that were in New Zealand society and how people were viewing them as well, to counterbalance and show the students that it's not just something which is locked in this particular setting. So as much as possible we try and put things into a number of contexts so the students can understand this concept that they're learning. But at the end of the unit when they are assessed they are assessed on their concept knowledge. And they can draw on a context that they've learnt in class or if they give us something else it doesn't matter.

This conceptual focus has, in fact, been legitimised later in the study period 2003 to 2008. Changes were made to the social studies achievement objectives to reinforce the conceptual focus. For example, the title of AS90217 changed from *Conduct a social studies inquiry* in 2003 to *Conduct a social studies inquiry to communicate conceptual understandings about society* in 2007.²⁸ Such developments

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<http://www.nzqa.govt.nz/ncea/assessment/search.do?query=Social+Studies&view=achievements&level=01>

aligned with Layton's (1972) descriptor of a subject developing an 'internal logic and coherence'. Conceptual learning does not mean an absence of content knowledge, but rather the evidence or content is used to support learning of the concept rather than being an end in itself. In this way, learning can be transferred from one context to another as illustrated in Vignette 2.

The uniqueness of social studies as an integrated subject is legitimated by the four "social studies traditions" (Barr et al, 1997, pp. 41 - 42), which are described below. Within some of these four traditions elements of the discrete social science disciplines may be identified.

4.5 SOCIAL STUDIES TRADITIONS

As has already been discussed, social studies in New Zealand evolved from the longer established 'The Social Studies' in the USA. Meikle (interviewed in Openshaw, 1991) noted that had the subject been introduced in New Zealand twenty or thirty years earlier, it is more likely to have adopted a British approach. Three 'traditions' of The Social Studies in the USA identified by Barr, Barth & Shermis (1977) were social studies as citizenship transmission, as a social science, and as reflective inquiry. A fourth tradition, that of personal development as defined by Australians Brian Hill, Rob Gilbert and Colin Marsh, was added in 1987 (Barr et al, 1997). The authors of the *Position Paper* (Barr et al, 1997) reminded the New Zealand social studies community that citizenship education was only one of four traditions upon which the subject is based in the USA.

Whether these four traditions are mutually exclusive or interdependent has been debated, along with the extent to which they complement or challenge each other (Milligan, 2006). In the USA, Barr, Barth and Shermis (1977) considered that all three of their traditions had citizenship education as an end, but that the means to that end were different. Kennedy (1979) argued, however, that these traditions were not three subsystems of a single structure but competing structures. The number of social studies traditions postulated over the years has ranged from

three to eight (Sinnema, 2004). Three traditions for education in general suggested by Kieran Egan (1997) were socialisation, academic excellence and fulfilling individual potential, which resonate with the social studies traditions.

The four social studies traditions are now considered in light of the empirical data gathered and the literature reviewed for this study.

4.5.1 CITIZENSHIP TRANSMISSION

The citizenship education tradition suggests that the principal task of social studies is to educate future citizens of our nation, this being best achieved by passing on to students a generally accepted body of knowledge and understanding (Barr et al, 1997). In the US tradition, the key term is “transmission” or “inculcation” (Barr et al, 1977, p. 59) as the name suggests. Adult teachers are considered to possess a particular conception of citizen that they want to share with their students. This is a normative approach, with a series of ‘oughts and givens’ inculcated to students.

The central role of citizenship education has been evident in the policy documents throughout the sixty year history of social studies in secondary schools. The first aim expressed by the *Thomas Report* (DoE, 1959) stated “To assist in the development of individuals who are able to take their parts as effective citizens of a democracy” (p. 27). The domestication role of citizenship education was recommended in other early policy documents of the time, displaying a strongly nationalistic fervour:

Love of one’s country, willingness to serve it, and faith in its future are a complex growth which should begin to evolve in the primary-school child’s own emotional life. History and geography can help in this by drawing attention to life, both past and present, in the local district and in New Zealand as a whole, and then to the relation of this in other parts of the world. (DoE, 1958, p. 1)

Citizenship education goals have continued to the present day, though with a diminished emphasis on nationalistic fervour and an increased emphasis on

responsible, participatory citizenship (DoE, 1961, 1977b; MoE, 1994, 1996, 1997, 2007).

Literature about citizenship education distinguishes between the concepts of civic literacy and civic participation. The former involves learning about the institutions and systems of government for future participation – ‘civics’ as it was taught in New Zealand until the introduction of social studies. The more recent emphasis on civic participation, in which students are encouraged to take social action within authentic contexts in their communities (Aitken, 2005a; Heater, 1999), is regarded as more meaningful for students. Citizenship education has been introduced in a number of western democracies such as UK (Crick Report, 1998²⁹) and Australia (e.g., the Australian Council of State School Organisations Inc. *Discovering Democracy Project*, and the new civics approach taken by the *National Framework for Values Education in Australian Schools 2004-2008* (Commonwealth of Australia, 2005)). In the UK, citizenship education has been mandated as a stand-alone subject or integrated at Key Stages 3 and 4 (years 7 to 11 in New Zealand schools) and has experienced varying levels of success. The title of Chamberlin’s (2003) article *Citizenship Education – only if you haven’t got a life* sums up the challenges for teachers trying to inspire students with the transmission model and civic literacy approaches to citizenship education.

Teachers’ responses varied when answering Question 5.1 in the postal survey “Do you articulate citizenship education goals with your students?” Most responded positively, with 37% stating “frequently”, 44% “occasionally”, while only 16% responded “never”, and 2% “not relevant”. The focus of citizenship education was discussed at length in both the focus group and some of the elite interviews. There was a high level of acceptance of the central role of citizenship education within social studies, but not in a passive, domestication sense. For example, when asked if he felt comfortable with “this whole citizenship thing”, PAR2

²⁹ Available from the U.K. Qualifications and Curriculum Authority, http://www.qca.org.uk/qca_4844.aspx

responded “It depends on how you see citizenship, if you use it in the wider sense of engagement in society. If citizenship is how do you vote in elections (narrow sense) then I would be against it, but the broad definition of citizenship is being involved in society, knowing how it works.”

More recent literature on citizenship education also distinguishes between the socialisation or domestication role of preparing students to accept the norms and morés of society and the counter-socialisation role in which students are encouraged to challenge and think critically about these norms and morés (Codd, 1999; Egan, 1997; Engle & Ochoa, 1988; Milligan, 2006; Milligan & Beals, 2003; Openshaw 1996/97). Andrea Milligan (2006) argued that the social studies community has not engaged in sufficient dialogue and debate about the term ‘society’, with the *SSiNZC* document representing society as “static, ordered and predictable This social theory [of *SSiNZC*] which implies certainty in our social world is largely unsatisfactory because it fails to cognise the fluidity of society and social change experienced by learners and articulated by contemporary sociologists” (p. 5).

The greater emphasis on awareness of identity (personal, ethnic, national) has impacted on attitudes to citizenship education and reflective inquiry. The role of critical thinking in social studies discussed above is considered further in the next section, under the tradition of reflective inquiry.

4.5.2 REFLECTIVE INQUIRY

The second tradition emphasises the role of critical thinking. Citizenship goals are considered to be best promoted by helping students to develop the ability to make reasoned and rational decisions about social issues. Knowledge is derived from considering real life problems which are self selected by students and which constitute the content for reflection (Barr et al, 1977). This approach departs from the socialisation or domestication role of students passively accepting society’s norms and morés, to a much more active questioning, counter-socialisation role,

that is, the ability to think critically, evaluate information and make informed decisions (Engle & Ochoa, 1988). In reflective inquiry, students should be taught to “reason, to hypothesise, to ground opinions in fact and to differentiate between fact and opinion” (Barr et al, 1977, p. 65).

Teachers expressed an overwhelmingly positive response to the postal survey Question 5.2 “Do you encourage students to engage in critical inquiry and debate about society?”. Eighty percent responded “frequently” whilst 20% responded “occasionally”. No one responded “never”. RES37 wrote “I teach to change the world, but not through doctrine or dogma, but by encouraging students to think”.

INF2 encouraged her students to think critically. She stated that some of her students thrive in social studies because they have strong opinions and “it’s the one subject that they do really well in because they do have an opinion.” In relation to the context of the foreshore and seabed issue she observed:

I think social studies is a subject that should encompass different opinions and it should allow the students to be able to voice them comfortably. My belief is that in a social studies classroom, we are trying to prepare them to be informed citizens to participate in our society and if they don’t have a chance to voice their opinions and work out why they hold them and work out what their values are and why they hold those values, or change them if they decide to change them, then we haven’t actually fulfilled our role as teachers because they are not informed.

The domestication role of early social studies, which embedded values that were largely uncriticised, has been challenged in recent years. Social studies teachers at an ANZFSSA conference were challenged by John O’Neill (1999):

It is inconceivable to me that you would not want to ensure that students’ experience of social studies takes them beyond the safe, bland relativism of values exploration and into the more important but relatively uncharted terrain of socially critical values education with you, the teacher, acting as a ‘conscientious objector’. (p. 27)

The values exploration process has the role within reflective inquiry of encouraging a higher level of critical thinking (Taylor & Atkins, 2005; Milligan &

Beals, 2003). The NZC (MoE, 2007) has recently identified critical thinking as an official key competency for all students in New Zealand schools as all levels, not just social studies students.

4.5.3 SOCIAL SCIENCE

The third tradition, that of social studies as a social science, recognises social studies as both a singular and a region (Bernstein, 1996), in other words acknowledging social studies both as an integrated subject and as a component of 'The Social Studies'. Based on the ideas of the National Council for The Social Studies [NCSS], this tradition stresses the role of discovery and decision making by students in adapting and mastering the best "concepts, processes and problems" (Barr et al, 1977, p. 67) from any of the humanities and/or social sciences within this 'region'.

The tradition of social studies as a social science thus reinforces the research tradition. The inquiry approach has long been central to social studies pedagogy, starting with local community studies recommended by the *Thomas Report* and developed and promoted by Meikle who considered that though these were often ineptly carried out, to her:

... then and now, the three local surveys we made did more than any other aspect of social studies to take some boys and girls a step or two along the road to becoming 'well informed, thoughtful, feeling and responsible people'. [This was her definition of good social studies](1994, p. 111)

Meikle's dedication to the research component inherent in local surveys mirrored the pivotal role of projects advocated by Herbert Kliebard (1987) who was opposed to subject-based curricula. Kliebard considered the project approach to be a constant which underpinned social inquiry irrespective of whichever of the various interest groups who influenced curricula in the USA, during the period 1893 to 1958, were in vogue at a particular time. The three main interest groups (developmental, social efficiency and social meliorist) promoted different approaches but coalesced in response to political and economic changes over time.

The approach taken by New Zealand social studies was regarded as a developmental-social meliorist approach (Diorio, 1992). This approach, incorporating the ideas of Taba as adopted in the *Syllabus Guidelines* (DoE, 1977b), argued that effective, authentic participation in society is needed in order to effect social change. It mirrored a reductionist ideology which posited that students should not only learn how to function in society, but also how to change society in order to build a new and better social order (Barr, 2000; Keen, 1979; Tanner & Tanner, 2007).

In this study, teachers of senior social studies were considered to need to have a broad world view and an interest in current affairs (INF3, INF2). The development of knowledge about how societies operate (social literacy) through the use of three skills processes - which enable students to participate effectively in society - comprise the 'twin goals' of social studies (Barr, 1998). Social literacy has been articulated further as a result of the *Social Studies Exemplars* (MoE, 2004) into three 'aspects of learning' - learning about how society operates, how people participate in society and how people make connections to their learning (p. 1). While social studies in New Zealand has developed unique skills processes with the mandating of *SSiNZC*, there are elements in common with the other social science subjects such as the focus on research or inquiry.

In their struggle to define social studies beyond criticism as 'social stew' and other such derisory labels, the NCSS in the USA promoted the notion that "The Social Studies is an integration of experience and knowledge concerning human relations for the purpose of citizenship education" (Barr et al, 1977, p. 69). The fourth tradition, that of personal development, is now considered in relation to the three skills processes of *SSiNZC* - especially values exploration.

4.5.4 PERSONAL DEVELOPMENT

The fourth tradition emphasises the role of the individual within wider society. It draws upon Hill's (1994) definition of social studies as "... the empowerment

of the social and ethical self, resulting in a person critically loyal to the democratic society and therefore committed not just to private or sectional goods, but to the common good" (p. 109).

The personal development tradition emphasises the role of personal values within the broader framework of social values. It links to Egan's (1997) notion of personal fulfilment as well as the second of the *Thomas Report's* two aims for social studies, "to deepen pupils' understanding of human affairs and to open up fields for personal exploration" (DoE, 1959, p. 27).

The distinction between personal values of the individual (such as freedom, individualism and diversity) and the wider values of society (such as authority, conformity and commonality or 'the common good') were termed "pluribus" and "unum" (Cortes, 1994, cited in Barr et al, 1997, p. 43). The conflict between the two - the demands of the individual and the demands of the state - have long been a feature of democratic societies (Barr et al, 1997). The notion of the common good as a key concept in social studies curriculum discussions was further explicated by Barr, Hunter & Keown (1999).

There is a strong link between this tradition and my initial study topic for this research in which I was keen to study how students could develop a deeper understanding and practice of the values exploration process. In particular, the tradition could argue that values inquiry should not just be a pen and paper activity but a deeper process involving students clarifying their values and internalising the ones they adopt. The concept of critical affiliation identified by Hill (1994) answers the 'so what?' question of 'what do we do once we have analysed values and made decisions about possible courses of action?' (Hill, 1994; Keown, 1998).

Nick Zepke³⁰ noted that the values exploration process in New Zealand social studies operated in a rational, linear model. This is in contrast to the position of advocates of values inquiry in social studies who have suggested strategies or modalities of values inquiry, starting at a lower level and progressing through to a commitment to internalising the values analysed and culminating in taking social action. These positions are compared in Table 12, below.

TABLE 12: COMPARISON OF CHANDLER’S APPROACHES AND HILL’S MODALITIES

Chandler’s Approaches	Hill’s Modalities
Values inculcation	Values transmission
Awareness or exploring feelings	Values clarification
Moral reasoning	Empathy
Values analysis	Values justification
Values clarification	Values negotiation
Social action	Participation

Sources: Chandler, 1979; Hill, B., pers. comm., 27.09.05.

Just as the citizenship transmission tradition took a didactic, inculcation role, so too did the first approach to values inquiry for these two authors. After that the two listed a range of approaches, both incorporating values clarification (though at different stages) and ended in some form of participation or social action by the end of the values inquiry. The values clarification movement was based on the premise that people are floundering in confusion and apathy and cannot establish clarity using their values. By devoting more time and energy to values-related thought, students should be encouraged to conduct more deliberate and comprehensive reflection on their own personal values as well as the moral values of society as a whole. Accordingly, valuing was perceived as a process, with individuals arriving at their own personal values schema through ‘choosing, prizing and behaving’ (Raths, Harmin & Simon, 1978). The end result was termed ‘critical affiliation’ (Hill, 1994) with students affiliating to a selected and esteemed set of values and acting accordingly. The fact that the values exploration process

³⁰ Zepke, N., pers. comm., 31.05.05.

in *SSiNZC* takes a values clarification approach was noted by Sue Ferguson (2002) of the Australian Council for Educational Research in her report to the MoE for the *Stocktake* (MoE, 2002).

Critics of the approach to values inquiry in New Zealand social studies argue that such an activity encourages values relativism, that is, an acceptance and justification of all personal values, even those social values that societies would normally find repugnant such as family violence (Henderson, 2003). Even social studies advocates find values exploration difficult, with the process being variously defined as “doing the hard bits” (Keown, 1998, p. 137) and slippery and chameleon-like (O’Neill, 1999; Wood, 2007). The process requires active discussion and debate over the complexities of the social world which harbours conflict and controversy (Wood, 2007).

All three social studies processes in *SSiNZC* (MoE, 1997) interweave to help students gain information on an issue and take decisions about appropriate social action. Asking the ‘so what?’ question and taking social action in their communities had been recommended in the 1980s (Buckland, 1982), and recently has been incorporated into the social inquiry process in the *NZC* (MoE, 2007). In between those times, social action was to be a requirement of the social decision making process as described in the draft *SSiNZC* (MoE, 1994) but was dropped from the final document in favour of the safer “making decisions about possible social action” (MoE, 1997, p. 18). Facilitators of the *Social Studies Exemplars*, when challenged to identify the distinctiveness of social studies, concluded that students must develop knowledge about how people (themselves and others) participate in society. This decision resonates with current discussions about the nature of knowledge.

In recent discussions about ‘The Knowledge Society’ and new conceptions of knowledge, education is seen to have a crucial role in maintaining social justice and social cohesion. It is argued that this role will be jeopardised if educators

and proponents of knowledge wave ideas 'talk past each other' (Gilbert, 2005), exacerbating the polarisation between groups in our society. Using this argument, social studies has a key role in schools in facilitating such discussions and social activism. Teachers in the postal survey did not, however, appear very confident about this role.

Teachers provided a guarded response to Question 5.3 *"Do you encourage/enable students to take social action as a result of your studies?"*. Twenty seven percent responded "frequently", 58% responded "occasionally", 15% "never" or "not relevant". The types of social action reportedly taken by teachers reflect activities that are manageable within a busy classroom and school context – they probably also conform to Occupational Health and Safety regulations. Social action is defined as an activity or activities undertaken by a student or group of students in an effort to contribute constructively towards social change as a result of their studies. For example, PAR4 engaged her students in the issue of the V8 car race that was proposed for Wellington in 2004, encouraging students to download the submission form from the Wellington City Council website, complete it and send it in. Although they did not get a response to their submissions, she considered that they had discovered a means for having their say on a community issue.

Table 13 overleaf ranks examples of social action reported by teachers in the postal survey.

TABLE 13: EXAMPLES OF SOCIAL ACTION TAKEN BY STUDENTS N=48

<i>Type of action</i>	<i>Number</i>	<i>Percentage</i>
Letters to NGOs e.g. Amnesty International	6	12
Practical action for the environment	6	12
Letters to central or local government, MPs	5	10
Encourage students to take on a leadership role in the school or in the community; influence their peers	5	10
Letters to Editor	4	8
Select 'school candidate' for political election	3	6
School based 'Freedom Week' or 'Land Mine Action Day', 'Fair Trade Day'	3	6
Collections for groups e.g. World Vision, 'Make Poverty History' campaign	2	4
Visit local MP or invited MP into class	2	4
Letter or proposals for change to Principal or BOT	2	4
Visit local council	1	2
No response	9	19

Source: Phase Three: Postal Survey, Question 5.3.

Voluntary comments to question 5.3 included "All classes are required to complete a social justice activity e.g. collecting for street appeals, raising funds for the underprivileged, visiting and performing for rest homes etc"(RES11) and "Selling bracelets for VSA; Amnesty International group and projects; fundraising for books for Cambodian school" (RES16).

INF4 noted that while he was at the combined social sciences conference, *SocCon2005*:

I was quite encouraged ... at the number of examples in some of the seminars and twenty minute sessions and so on, of people giving their students things to do and take responsibility for, because that's the stage of participation, the point at which values begin to take hold and beliefs are translated into lifestyle.

The following two vignettes illustrate effective social action taken by students as reported by their teachers.

VIGNETTE 3: TAKING SOCIAL ACTION – SYRINGE DISPOSAL

PAR1 was proud of two of her students who became very concerned about the disposal of infected syringes in countries suffering high incidences of HIV/Aids. On their own initiative, these two students discovered that it cost \$100NZ for a sealed disposal container for such syringes and they raised \$200NZ and sent it to a non-governmental organisation in Africa for this purpose.

The fact that one of these students did not pass the written assessment for AS90219 did not concern the student's mother; she felt her daughter had engaged in valuable learning through these actions.

VIGNETTE 4: ENACTING PARTICIPATORY CITIZENSHIP -FLAG IT

INF1 responded to a question about how she designed her programme in order to help her students to engage in civic participation (Heater, 1999) by discussing social action taken by her accelerate year 10 class:

To me, part of social decision making is that they have got to do something... the social decision making activities involve them doing something in our school or in our community. But it's got to be something that they can do and take part in even if its hypothetically in the classroom ... we did 'Flag It'. That was awesome. They had to raise the profile of whether we need a new flag or not and that's where the kids ended up in [the local newspaper]. They went, and I don't know how they did it, but they spoke to our Editor and they got a half page spread on the Tuesday. They were on the local radio station one breakfast running a talk back show where people were ringing in. They put posters up in the mall and in the library. And they actually... they succeeded. They got people in X talking about whether we needed a new flag, they got people writing letters to the Editor saying 'I fought for my country and what are these upstart little school girls trying to change the flag'. Which they weren't, they just wanted to get people talking. So that's something that works well with an accelerate class but they did it. They "walked the walk and talked the talk". I was so proud listening to them on the radio station.

The newspaper resource the students created is still used by classes in the school, not just social studies classes and of course we entered that 'design a flag' competition that the flag.com website ran. They either had to design a flag or write an essay. So they....and it was the accelerate class ... so they did it. But if we want them to be (you know) participate and be active in the future we've got to model it now and let them do it. We can't say that one day you can write a letter or one day you can have a protest march.

Activities such as that described in *Flag It* rely on teachers who have a strong sense of self-efficacy as described in chapter three, who engage their students with values inquiries which lead on to social action, and who are not afraid to be criticised as 'social engineers' (Keown, 2001; McGeorge, 2000; O'Neill, 1999). Teachers with a strong sense of social justice, the confidence to discuss contentious issues and who encourage their students to take socially responsible actions, who might be considered social meliorists, have been termed 'social activists' by Openshaw & Archer (1992) who reflected that this term was first used in relation to social studies teachers in the 1970s.

In this study, teachers responded in a guarded manner to Question 5.4 of the postal survey "Do you consider yourself to be a social activist in your teaching of senior social studies?" - only 12% stated "frequently", whilst 60% stated "occasionally", 21% "never" and 7% "not relevant" or did not respond. RES16 commented "[senior social studies] has had a positive impact on the attitudes of the senior school. Students are very aware of issues because we are quite pro-active in advertising them." Affirming the question, RES13b wrote "I can't teach social action without modelling a real interest in the world around me and a desire to make change." In a conflicting response, RES20 noted "NA. I am a teacher applying the principles of the curriculum. That is my job."

Social studies teachers thus responded with a range of voices to the changes in their curriculum upon which their assessment practice was now based. In particular, concerns for the integrity of the discrete social sciences subjects

reflected the multiple voices in a community which has been constantly subject to change.

4.6 CHAPTER SUMMARY

Chapter four has provided the context for much of the study. The implementation of senior social studies has once again uncovered a number of unresolved issues which have created tensions and conflict for teachers over the six decade history of the subject in secondary schools. These conflicts relate to the integrated nature of the subject, the need for an integrating theme, the low status of social studies, the on-going sibling rivalry between the component social science advocates and the four traditions which have legitimated the subject here and in the USA.

The contemporary focus of the present study has been set against the historical background of social studies developments. The data and literature have been interwoven to show the parallels between teachers' responses in the past and present as well as parallels between the range of their responses to educational change.

Fundamental to social studies is its integrated nature, which has proved ambiguous in practice and has not been well understood or supported over the six decades. Teachers have responded to curriculum developments over the key periods in similar ways, by either embracing the integrated subject or by retaining the discrete social science subjects. Their varied and conflicting responses over the periods of curriculum development were summarised using Brain and colleagues' typology to show a range of responses from enthusiastic acceptance to antagonism (Table 10). The low level of classification and framing of social studies, compared with its component disciplines, was put forward as one reason for the differential responses.

Integrated subjects need a unifying theme. The literature and data suggested that strategies for integration are needed. Various integrating themes have been suggested over the history of social studies with 'problem topics' emerging early on. The predominance of topics focusing on contemporary social justice issues at local through to global scales emerged in the present study (Table 11).

The on-going sibling rivalry between social studies and its component subjects was described. The greatest and most persistent level of antipathy over time has been expressed by historians, with mixed responses by the geographers, passive resistance by economists, and a potential to develop links with sociologists. The emphasis on conceptual learning, representing a low level of classification, has been regarded as both the greatest strength and drawback of the subject.

The subject has been legitimated by the four social studies traditions – citizenship transmission, reflective inquiry, social science and personal development. The role of values exploration and social action, while inherent in the first three traditions, were discussed within the context of personal development. The traditions are not mutually exclusive, with all involving citizenship education goals. This goal was accepted by the contemporary pioneers, with a number of teachers encouraging their students to think critically. Some teachers in this study were engaging their students in manageable forms of responsible social action (Table 13) although most expressed caution about being termed 'social activists'.

There were four significant examples of conflicting teachers' responses in chapter four. The range of responses of teachers to various phases of social studies curriculum developments, from enthusiastic acceptance to outright antagonism, was classified using various terms in Table 10. Overall, these reflected a diversity of teachers' responses to change. The lowly prescribed, conceptual nature of social studies has been seen as both as strength and weakness of the subject, both in the literature and revealed by teachers' comments. While some

teachers embraced the openness and flexibility of the subject, others searched for greater guidance. The on-going sibling rivalry within the social science community over time, including overt antipathy from history teachers and passive resistance from economics teachers, contrasted with the more accepting response by geographers and exemplified another conflicting response. Finally, whilst social studies teachers generally accepted the citizenship education goals of their subject, conflict was evident between those who perceived their roles to include encouraging social activism amongst their students and those who did not.

The curriculum story presented in this chapter has provided the backdrop against which the introduction of the new qualifications and assessment system, the NCEA, is now set.

CHAPTER FIVE: CONTEXTUAL FACTORS II

TEACHERS' RESPONSES TO THE EVOLUTION OF STANDARDS-BASED ASSESSMENT IN SOCIAL STUDIES

5.1 INTRODUCTION TO CHAPTER FIVE

The social studies community was presented a significant opportunity to enhance the academic credibility of their subject when it was included as part of the national senior secondary school credentialing system upon the introduction of the NCEA from 2002. Chapter five traces teachers' differing responses to the evolution of the current standards-based assessment system from the previous norm-referenced system operating in New Zealand.

The contribution of this chapter to the overall thesis is to provide a third combined data and literature chapter, which has its focus on changes to the assessment paradigm. Curriculum and assessment are inextricably intertwined, so it is appropriate that the chapter on assessment follows that on curriculum. In Bernstein's terms, social studies teachers have to negotiate the constraints of this highly framed assessment system within the context of their weakly classified curriculum. The following chapter, chapter six, discusses teachers' responses to the levels of support provided by the professional communities of practice charged with supporting classroom teachers as they negotiate these curriculum and assessment parameters.

This chapter, then, provides the *assessment* story. It continues by exploring, in turn, the transition from the previous norm-referenced assessment system to an evolving standards-based regime; the opportunities provided to social studies by its inclusion in the NCEA; constraints placed on senior social studies by the NCEA; and an evaluation of the current situation of senior social studies within the social sciences learning area, for both achievement and unit standards. The typology developed by Dobric (2005) (chapter 2, section 2.5.3.5) helps to explain the findings. The chapter concludes with a summary.

As in the previous chapter, the balance between contextual material and data gathered in the course of this study, favours the former.

5.2 THE MOVE FROM NORM-REFERENCED TO STANDARDS-BASED ASSESSMENT

The assessment story begins with an historical overview of the contested transition from the traditional norm-referenced to a standards-based qualifications and assessment system. A time line of these developments is provided (Appendix I).

5.2.1 DISSATISFACTION WITH THE NORM-REFERENCED SYSTEM

The concerns of some teachers about the norm-referenced qualifications system were long standing. In this system marks were scaled and approximately 50% of candidates were considered to have failed. Dissatisfaction with the qualification system was first noted by the New Zealand Post Primary Teachers' Association [NZPPTA] in the 1960s who argued it was "past its use-by date" (Alison, 2006b, p. 4). Other commentators traced the discontent over this 'gate-keeping' system from the 1970s (e.g., Strachan, 2001; Dobric, 2005) and 1980s by which time the antipathy was 'very evident' (Openshaw, 2005). On the other hand, strong supporters of the norm-referenced assessment maintained allegiance to the traditional system and a number continue to advocate for it.

The norm-referenced qualifications system, in place in New Zealand until 2001, involved a three-tier, piecemeal structure with School Certificate taken by students at the end of the third year of secondary school as recommended by the *Thomas Report* (DoE, 1959) (although originally it was recommended that it be taken at the end of the fourth year). For the fourth year of secondary schooling, University Entrance co-existed as the second tier with Sixth Form Certificate from 1969 until 1986 when University Entrance was moved to the fifth year. The third tier, University Bursary, was the major fifth year qualification from the mid 1960s until 2004.

Within the norm-referenced system social studies was not an examinable subject. It held two roles: one briefly as a subject assessed for local certificates in form five in the 1970s and not widely adopted (Austin, 1985) and secondly as a feeder or 'ladder subject' (Northover, 1980) in years 9 and 10 towards other subjects. It was not a subject offered for School Certificate, therefore teachers of social studies in the first two years of the secondary school regarded these years as a prime opportunity to develop the skills needed in history and geography in their third year (Meikle, 1959a; Northover, 1980; Openshaw, 1991, 2005; Openshaw, Lee & Lee, 1993; Whitehead, 1974). Thus social studies was perceived as introductory history and geography.

While the recommendations of the *Thomas Report* were intended to overcome the dominant effects of the former University Entrance qualification on secondary school pedagogy, the end result was the dominance of School Certificate instead (Meikle, 1960, 1961). Secondary school subjects which were examinable in the national credentialing system were privileged over those which were not. Subjects that were examinable for School Certificate were accorded high status, those who were not such as social studies were accorded lower status (Meikle, 1961; Openshaw, Lee & Lee, 1993; Whitehead, 1974). This severely disadvantaged the social sciences. The hierarchical scaling system, introduced from 1974, reinforced the differential status of School Certificate subjects (Openshaw, 2005), with 'hard' subjects like Latin allowing more than 50% pass whilst 'soft' subjects like home economics had a less than 50% pass rate. Perceived inequities within the norm-referenced system fuelled interest in a changed assessment paradigm.

5.2.2 INTRODUCTION OF INTERNALLY-ASSESSED COMPONENTS

Elements of internal assessment were introduced into the norm-referenced system from the mid 1980s. For example, within the social sciences up to one-third of School Certificate and Bursary economics, history and geography were internally assessed. School-wide, the whole of Sixth Form Certificate was internally assessed. This combination of external and internal assessment, with a

high level of scaling of marks to establish comparability, affected students' final results (Openshaw, 2005) and was also deemed inequitable.

The impact of increasing levels of internal assessment after 1986 resulted in teachers appreciating the relative freedom which internal assessment as a more weakly framed (Bernstein, 1972) assessment system afforded (Alison, 2006b):

Teachers were really enjoying the freedom Sixth Form Certificate gave to develop their own approaches to subjects, to design new courses, and they were enjoying being able to validly assess things that couldn't be assessed in exams, like creative writing, workshop skills, lab experiments and so on. (p. 5)

Thus there was quite a lengthy background to the introduction of standards-based assessment in New Zealand secondary schools.

5.2.3 FIRST MOVES TOWARDS STANDARDS-BASED ASSESSMENT IN THE SOCIAL SCIENCES

In the 21st century, standards-based assessment is "a dominant assessment paradigm in English speaking countries" (Rawlins, Brandon, Chapman, Leach, Neutze, Scott & Zepke, 2005, p. 108) and a characteristic of a wider neoliberal outcomes-based educational reform movement (Codd, 1997; Lee, 2003). It has evoked considerable and complex debate (e.g., Dobric, 2005; Rawlins et al, 2005) from both passionate advocates and vociferous opponents. The change entailed a considerable paradigm shift for teachers (Fastier, 2007).

Social science teachers were first introduced to standards-based assessment via a form of criterion-based assessment known as achievement-based assessment. Courses for geography teachers were held nationally in the late 1980s.³¹ The popular *Handbook* (MoE, 1991) introduced achievement-based assessment in junior social studies with a series of seven aspects to be assessed, each with a range of five progressively sophisticated, higher order (Bloom's Taxonomy) steps or criteria. For example, the five criteria for the assessment aspect *Looking at an*

³¹ Researcher observation based on direct experience of ABA workshops at Massey University July - August 1989.

Issue ranged from *Recognises points of view* at level one through to *Describes points of view and explains thoroughly why they are held* at level five (p. 77).

The next stage in the evolution of standards-based assessment was the introduction of unit standards. A unit standard was defined by the NZQA as:

...a statement in outcome terms of critical factors and criteria for the assessment and recognition of achievement. It is said to provide a standard against which students may be assessed and identifies what a student is expected to know, do or understand to demonstrate mastery of a Qualifications Framework unit. (Hall & Keown, 1996, p. 128)

Unit standards were initially industry-driven but were introduced into secondary education in the 1990s. Unit standards were written for secondary school subjects from 1993-1994 and were still in draft state when the first national moderation trial began for geography and mathematics in 1995. As a member of the geography trials, I recall the decision making 'on the hop' during this period. The final forms were approved in July 1995 (Hall & Keown, 1996).

The social studies community was involved in writing unit standards for social studies with two members of the Waikato Social Studies Association involved. These were never implemented, however,³² due to contested curriculum developments occurring during this period (Hunter & Keown, 2001).

Although the dissatisfaction with the norm-referenced system was evident from the 1960s, many teachers reacted with considerable opposition when NCEA was introduced in the late 1990s. As a consequence, Alison (2006c) noted that secondary school teachers in her study displayed a concerning level of 'professional amnesia'. The unease of teachers may have been due to wider political agendas of which they were not fully aware, sometimes termed 'the quiet revolution'. Socially critical researchers (e.g., Codd, 1997) regarded unit standards as part of the right wing, neoliberal agenda of the late 1980s and 1990s of which economic rationalism was a goal. Following this argument, the increase

³² Baldwin, K., NZQA, electronic comm., 3.04.07.

in skills would improve the economy. Critics, however, argued that the breaking down of components of knowledge in this outcomes-based system echoed Taylorism and the social efficiency paradigms popular in industry, then in education, in the USA in the early 20th century as well as the move to social reconstructionism (Lee, 2003).

Unit standards exemplified a view of knowledge as a product rather than a process, as a performance, and a commodity to be bought and sold in the market place (Codd, 1997). The key problem for education, critics considered, was that the assessment system emphasised objectively measurable performance within a school curriculum where professional subjectivity in assessment is often crucial, such as the evaluation of an essay. The advent of the National Qualifications Framework [NQF], John Codd concluded, represented “a fundamental and far reaching shift in what counts as knowledge” (p. 133). This shift in the conception of knowledge continued with the introduction of the NCEA.

5.2.4 THE INTRODUCTION OF THE NCEA

The NCEA was heralded as an “ambitious scheme” by Paul Black of Oxford University (2001, p. 1) who had been commissioned by the MoE to write a report on this proposed national credentialing system. The shift in thinking which informed its development mirrored developments in England, Wales and Scotland in the late 1990s (Dobric, 2005). The evolving standards-based assessment and qualifications system, which began with unit standards, was signalled in the *Green Paper* released on 5 June 1997 then in *Achievement 2001* (MoE, 1998). These documents heralded the future direction of the NQF (Lee & Lee, 2000).

The NCEA was a highly contested assessment and qualifications system which evolved over a decade following its gazetting. The policy underwent a number of changes through this time (Dobric, 2005):

This is a lengthy period of time, but with a policy so central and critical to the education of young New Zealanders it could be regarded as positive and fitting that the evolutionary nature of the policy contributed to a necessary acceptance of intense public and government agency debate. (p. 88)

The intention in *Achievement 2001* (MoE, 1998) was that the qualification would be phased in over three years from 2001. This date was delayed by one year, however, after protest by NZPPTA resulted in the Minister of Education, Hon. Trevor Mallard, conceding that the timeframe was 'overly ambitious' (Lee & Lee, 2000). Phased implementation began with level one in 2002, level two in 2003 and level 3 in 2004 (Strachan, 2001). As a result, the first cohort of students through the system were regarded somewhat as 'guinea pigs' as they worked through three years of new qualifications in succession (Hipkins et al, 2006a). Teachers who had been involved with unit standards trials found the transition to achievement standards easier to make (Lee & Lee, 2000; also³³).

The debate about the efficacy of the NCEA has continued throughout the first decade of the 21st century. Nonetheless, the innovation was considered in this study to be a significant opportunity for social studies to join the ranks of the privileged, examinable subjects.

5.3 OPPORTUNITIES PROVIDED TO SOCIAL STUDIES WITH THE NCEA

The inclusion of social studies in the NCEA framework was considered to be a defining point in the development of the subject and its move towards maturity, the third stage of Layton's (1972) model (Taylor, 2005). Wider benefits included the thinking that went into the achievement standards as they were written and developed, the increasing trend for social studies achievement standards to contribute to innovative or mixed courses, the flexibility of the internally-assessed achievement standards and the opportunity to assess the affective

³³ Researcher observation from experience in unit standards trials and development 1995-1997 and NCEA training days.

domain. These opportunities presented to the social studies community are discussed in the following sections.

5.3.1 WRITING THE SOCIAL STUDIES ACHIEVEMENT STANDARDS

The achievement standards were written for social studies in late 1999 by two full-time writers (Paul Keown and Robyn Irvine) and some part-time writers who were part of the 25 strong social science expert panel or writing team contracted to the MoE.³⁴ Writers were requested to provide between five and eight achievement standards per subject of which approximately half should be internally-assessed. Initially the writers aimed for eight social studies achievement standards (one for each of the five knowledge strands and one for each of the skills processes). They then decided that this would be seen as too many and that social studies would be seen as too hard compared to the other social science subjects.³⁵ The number was reduced to five – two externally-assessed standards to cover the knowledge strands and three internally-assessed standards. The historians established six achievement standards while the economists and geographers created seven at each level.³⁶

The two externally-assessed achievements standards for social studies addressed the aims of the ten achievement objectives at each of the curriculum levels and could be considered to be very weakly classified and framed in Bernstein's terms. For example, at level one these became AS90215 *Describe change in society* and AS90216 *Describe people's participation in society*. These two externally-assessed achievement standards represented the low level of prescription typical of the social studies curriculum. The three internally-assessed achievement standards at each level addressed each of the three skills processes in social studies – inquiry, values exploration and social decision making.³⁷

³⁴ Eppel, E. Group Manager Tertiary, Curriculum, Teaching & Learning, Ministry of Education, documents provided to the author, 20.06.05.

³⁵ Keown, P., pers. comm., 12.07.05.

³⁶ <http://www.nzqa.govt.nz/ncea/index.html>;

³⁷ These are currently being changed due to the alignment process. See Postscript, Section 8.7.2.

The writing process enabled key members of the social studies community to consider the components of the recently produced and weakly framed *SSiNZC* document. Although the achievement standards they produced were not as highly prescribed as those of the other social sciences, they did attempt to provide more guidance, especially for the internals.

5.3.2 CONTRIBUTION TO COURSE INNOVATION

Topical conceptions of knowledge and curriculum suggest that education systems need to change considerably in order to perceive knowledge as a process rather than a product (Gilbert, 2005) and to enable schools to offer courses targeted more carefully to students' needs (Bolstad, 2006). The introduction of the NCEA has opened up the opportunity for 'course innovation', 'mixed courses' or 'flexible educational pathways' (Hipkins & Vaughan, 2006b; Pilcher, 2006) which help meet the goals of Jane Gilbert and Rachel Bolstad above. These are all terms to describe the ability of students to 'pick and mix' their own programmes of study by selecting achievement standards from a range of subjects (as long as the school's timetable is modified to enable this). This course-based approach mirrors Bernstein's (1971) 'integration type' instructional code. As a contributor to mixed courses and being in open relationship with other social science subjects, social studies displays a sense of regionalisation (Bernstein, 1996) (chapter four, section 4.2.5). The increased emphasis on providing students with flexible educational pathways is having the effect of weakening "the strength of the classification of discourses ... leading to the reduction of discrete subject boundaries" (pp. 65-66).

In this study, evidence of course innovation came in two ways – the selection of achievement standards from a range of subjects in order to create a new course and the combining of unit and achievement standards into one course. Three schools were involved in the former. RES38 indicated her school was embarking on level two and three NCEA courses combining science and social studies the following year; RES37 offered one internal social studies achievement standard

and one geography achievement standards to their year 10 students on an outdoor education programme; RES27 offered a mix of geography, history, economics and social studies standards to lower ability year 11 students (Appendix H). The geography community, in particular, has shown some openness towards course innovation (e.g., Baldwin & Papprell, 2006).

The mixing of unit and achievement standards was more evident in the study, with nine responses. For example, RES20 incorporated legal studies unit standards as part of the school's senior social studies programme, while RES15, RES19 and RES36 included sociology unit standards. Thus four schools were offering unit standards as part of senior social studies courses (refer also Tables 17 & 18). On the other hand, some teachers reported including some social studies achievement standards within their environmental studies courses (RES17) and global studies (RES13b). RES5, 10 and 33 also indicated on the questionnaire that they offered a mix of unit and achievement standards (Appendix H). Thus 12 of 38 (31.5%) schools surveyed in the current study were offering some form of mixed courses.

In a recent national survey, Rosemary Hipkins (2007a) discovered that 20% of secondary schools reported course innovation in the social sciences by offering both unit and achievement standards (p. 19). The percentage of schools offering course innovations in subjects such as mathematics and English was much higher (73% and 66% respectively) with reasons given for such course innovation being to support slower achievers, provide a better balance of practical skills, add aspects of learning not covered by the achievement standards and to gain other national certificates (especially those associated with the industry training organisations) (p. 19).

Within this study, the social studies achievement standards to be utilised in mixed courses are more likely to be the internals rather than the externals. In one instance, INF2 noted that the English department in her school had adopted the

social studies inquiry process for their research standards. Significantly, when the achievement standards were written, the MoE had suggested that one common inquiry standard be used for all the social sciences but this was “pretty soon kicked into touch”³⁸ by the more traditional social science subjects.

5.3.3 PARITY OF ESTEEM

One advantage of the NCEA system has been that unit standards and achievement standards are in theory accorded ‘parity of esteem’ (Alison, 2005) within the NQF. This is consistent with the ideology articulated by Black (2001):

The difference in esteem between academically and vocationally oriented education has to be eliminated, the assumption being that this can only be done by assessing both of these in a unified system where all qualifications are interchangeable and equally valued. (p. 1)

Although officially unit and achievement standards enjoy parity of esteem, one teacher in the study was not so convinced. INF1 argued “everybody knows that unit standards are much easier to achieve than achievement standards, despite what Mr Mallard and Mr Benson-Pope say”. This teacher was keen to write unit standards with a lower literacy requirement so that her ‘lads’ in her first year of teaching senior social studies could have achieved some success with their studies.

Six schools in the postal survey reported that they were offering a mix of internally-assessed unit and achievement standards as noted in section 5.3.2. The data, however, do not explain why each school chose to offer a mix of unit and achievement standards and why students opt for such mixed courses. This would be a useful topic for further research (chapter eight, section 8.4.2).

5.3.4 THE FLEXIBLE INTERNALS

The focus group teachers (phase two) and respondents to the postal survey (phase three) indicated that teachers considered that they had more professional

³⁸ Keown, P., pers. comm., 12.07.05.

autonomy over the internally-assessed achievement standards than the externals. Despite the reported vagaries of the moderation system for the internals described in chapter six (section 6.3.1), teachers considered the internals less problematic than the externals over which they felt they had little control.

A number of schools were concerned about issues to do with the externally-assessed standards and favoured the 'less capricious internals' (Hipkins et al, 2006a). Teachers offering senior social studies to their year 10 classes had the ability to stop offering the externals if they proved problematic (e.g., RES13b). Almost one third of schools (31.4%) who responded to the postal survey were offering only the internally-assessed achievement standards, with the majority of these being to accelerated year 10 students (9 of the 11 schools). In contrast, just over two-thirds of schools who responded were offering a mixture of internally- and externally-assessed achievement standards at level one (Table 6; Appendix H).

Typically, students are more likely to achieve the internals than the externals – for example in 2003 93% of students achieved the internal AS90218.³⁹ Assessment commentators (e.g., Elley, Hall & Marsh, 2004) argued that the wide disparity between the levels of achievement in the internals as opposed to the externals in the initial years should not have been allowed to go unchecked by the authorities such as the NZQA.

Teachers and assessment commentators also expressed concerns about the 'authenticity' of assessment tasks (Alison, 2005). The argument that we are all professionals and can be depended on to always make valid and reliable assessments, which was touted at the time, was proved fallacious.⁴⁰ One strategy initiated during the unit standards trial was that of conferencing, whereby teachers could have a verbal discussion with a student whose work they believed

³⁹ This may well have masked the non reporting of failure for the internals in the initial years of the NCEA (PAR2).

⁴⁰ Childs, R., pers. comm., 16.10.08.

was close to reaching the standard expected but had not demonstrated this clearly, or was deemed to be on the border between one level of achievement and the next. This strategy has continued for the internally-assessed achievement standards even though it has the potential to reduce authenticity.

In response to Question 6.3 *“Do you use conferencing with students as a means of ascertaining their level of achievement in AS90218?”* the majority responded “occasionally” (54%), while 10% responded “frequently”, 32% “never” and 4% made no response. Both INF1 and PAR4 discussed their use of conferencing, with PAR4 conceding that “Maybe I mollycoddle them, I just use it [conferencing] when they are near the boundary” whereas INF1 felt that as a marker and moderator herself perhaps she was too hard on her students.

The practice of conferencing ideally should be a formal, transparent process as noted by INF2:

We’ve got policy put in place that if we’ve got reason to believe that the student understands but hasn’t actually expressed it and we don’t want to have to get them to resubmit formally in written form a section, then we will sit down with them with another department member present and we will question them. And that’s to check that we don’t ask them leading questions.

The practice of conferencing exemplifies some of the tensions raised for teachers with the NCEA as well as the range of responses to these tensions recorded throughout the study. The discussion now turns to teachers’ responses to assessing values, or the ‘affective domain’.

5.3.5 THE ABILITY TO ASSESS THE AFFECTIVE DOMAIN

As one study participant explained, much assessment in education targets the cognitive domain and to a lesser extent the psycho-motor domain (INF4). The inclusion of the values exploration process as a stand-alone achievement standard targets the affective domain, that of values inquiry. The NCEA has consolidated the formal assessment of values inquiry in social studies, which

began with the 'Looking at an Issue' achievement-based assessment criteria in the *Handbook* (MoE, 1991), later termed 'the values exploration process' (MoE, 1997).

Social studies is not the only subject to have a strong basis in values inquiry. In a survey of values in the curriculum, Paul Keown (2001) compared all seven curriculum statements of the NZCF (MoE, 1993). Of these, the *Health & Physical Education in the New Zealand Curriculum* (MoE, 1999) document mentioned 'values' twice as frequently as did *SSiNZC*. Social sciences were second equal in the number of mentions of 'values' of the seven documents.

The fundamental tension of assessing values was expressed by INF7:

The inevitable [tension] that always strikes me at a theoretical level is the inevitable tension around a credentialing model ... that does not necessarily rest well with something like values exploration or values education and then, my experience is, that the endeavour to kind of break down something like values exploration into something that can be measured and assessed, has the potential to reduce something that is complex to something that is complicated ... that it's got little parts that you can put together and tinker with, like an engine in a car.

Teachers' responses were mixed to Question 6.1 "*Do you think that values can be effectively assessed?*" Forty percent agreed, 38% were neutral, 17% disagreed and 5% did not respond. Of the five voluntary comments, three emphasised that the "understanding of values" can be assessed. RES25 asked "Whose values do you use to assess these?" whereas RES37 commented "Prejudice yes, but true empathy difficult".

The role of empathy is significant within the affective domain. In a rubric developed for assessing six "facets of learning" (Wiggins & McTigue, 1998, pp. 76-77), empathy was the fifth facet, just before the highest - "self knowledge". Descriptors for students' levels of empathy ranged from mature to egocentric (pp. 76-77). Hill (2005) argued that empathy as a capacity can be taught and assessed, though probably not with a pencil and paper test, whereas sympathy, as a commitment, cannot be so assessed.

A different approach was taken in the 1980s by Lawrence Kohlberg⁴¹ who constructed a six stage model of moral development in order to measure the level of ability to empathise according to students' levels of maturity, especially their ability to move from being ego-centric to world-centred. His model has been critiqued as deterministic and limited, especially as he used only boys in his study. More recently, social studies commentators have considered the usefulness of assessing values (e.g., Taylor & Atkins, 2005).

Voluntary comments from the postal survey (phase three) regarded the assessment of values to be problematic. "The most difficult of the three processes to assess. Too subjective at times depending on the setting"(RES5). Another response commented that "Values are hard, confusing often for teachers and students. What are we evaluating? Difficult to study as intangible, not concrete to learn. Students lose their way and need constant guidance" (RES24).

A concern that assessment of students' own values should not be part of high stakes assessment (part of my original research intention) was expressed by INF3. On the other hand, INF2 enabled her students to consider themselves as one of the stakeholders within the level one assessment activities. PAR4 noted that she provided students with statements about environmental issues as a result of their studies for AS90218 to which they responded in terms of their changed attitudes. She considered that the students took this activity seriously.

The varied responses in this study about assessing values support the conclusion in the ERO Report (2001) that "while generally teachers understood the concept of the processes, they found them difficult and confusing to implement" (chapter four, p. 8), especially the values exploration process. Various attempts over time have been made to support teachers with strategies for teaching values

⁴¹ Kohlberg's stages of moral development are explained in Crain, W.C. (1985). *Theories of Development*. Prentice-Hall. pp. 118-136 available at <http://faculty.plts.edu/gpence/html/kohlberg.htm>.

exploration at junior levels (e.g., Chandler, 1979; Cubitt, Irvine & Dow, 1999; Keown, 2003; Lemin, Potts & Wellsford, 1994; Zevin, 2007). The achievement standard at level one (AS90218) requires students to “*Explain, in depth, why people hold differing values positions*” and to “*Describe a range of consequences of people holding differing values positions and the consequences of these*” for excellence level (2004 version, Appendix K). The perceived relative ease of this achievement standard was one of the reasons the focus group teachers had broader concerns than my initial research focus (chapter two, section 2.3).

5.4 CONSTRAINTS ON SENIOR SOCIAL STUDIES

The strong level of framing of the outcomes-based system, the NCEA, has imposed constraints on teachers’ professional autonomy. A major concern expressed by teachers (Alison, 2005; Hipkins, 2007a) and by commentators (e.g., Lee, 2003) is the extent to which the assessment system ‘drives’ the teaching in senior secondary schools. This is described below.

5.4.1 ASSESSMENT AS DRIVER

Early social studies pioneers noted the important role of assessment in shaping the senior school curriculum and in privileging some subjects – the examinable – over others. In the past, the second year of secondary school has been described as a time for introducing students to knowledge and skills required in School Certificate examinations (Meikle, 1961; Northover, 1980; Openshaw, 2005). In the mid 1970s, Whitehead (1974) likened the “cramping influence of School Certificate ... [on] the core studies to the warm-up activities engaged in by athletes before the main event” (p. 62).

More recently, commentators have noted the constraining impact NCEA assessment has had on curriculum. Assessment has been perceived to be the driver of curriculum, ‘wagging the dog’s tail’. For example, Cedric Hall (1999) contended that “We know that in ‘high stakes’ assessment contexts, what is to be assessed quickly dictates what is taught and how it is taught” (p. 191).

Teachers in the study provided a range of responses to the refrain of assessment as 'driver'. In response to the statement in Question 6.4 of the postal survey "Assessment 'drives' my programme", 39% of teachers agreed, 34% were neutral and 24% disagreed whilst 2% did not respond. Of the nine volunteered comments in the postal survey, seven were in agreement that assessment drove their programme. The *NZCER National Survey of Secondary Schools 2006* reported an even more overwhelming support for the statement "Assessment is driving the curriculum now, even at Years 9 and 10", with 31% strongly agreeing, 49% agreeing, and 20% neutral through to strongly disagreeing (Hipkins, 2007a, p. 67). PAR2 considered this attitude to be attributed to a large extent to the 'knockbacks' teachers received during the moderation process.

In this study, the link between pedagogy and assessment was noted by RES20 "Assessment and teaching must both be part of a high stakes programme". Similarly, PAR2 acknowledged the concept of high stakes assessment (that is, crucially important to the students in relation to their choice of future education and careers), but stated that the phrase 'assessment as the driver' was a cliché and that he had a responsibility as a professional to help his students to succeed in the national qualifications.

Several of the lead educators (INF3, INF6 & INF7) were of the view that one cannot assess everything that is taught, that one teaches to the curriculum and students' interests while assessment remains in the background and that "assessment flows from the learning and not the other way around" (INF7). INF3 stressed that an assessment activity was just a snapshot or sample at a particular point in time:

... teachers [should] provide a wide rich learning programme of which assessment is only one bit, not the whole thing – a sample here and a sample here, what parts shall we sample here and there and how will we show progression? My view has always been that as a teacher my main job is to have an interesting, dynamic, relevant programme for students that they will be inspired by ... now it just so happens that somewhere along the line I've also got to do some assessment in order to satisfy

demands that are there for qualifications. I would fight to the death the notion that we should assess everything that's in a curriculum.

The varied responses of teachers to the view that assessment drives the teaching are reflected in other questions about assessment that arose in the study. While all subjects have experienced teething problems during the first five years of NCEA implementation, social studies has encountered additional problems due to having no history of examination practice. This is explained in the next section.

5.4.2 THE 'CAPRICIOUS' EXTERNALS

When examiners were writing the first examinations for the externally-assessed standards, they were challenged by the low level of prescription, the focus on the aims rather than the achievement objects of the strands of *SSiNZC*, and teachers' freedom to select whatever contexts for study they liked (INF6). As a result, they wrote open-ended essay questions which proved challenging for students with low levels of literacy. In succeeding years one of each of the two externals at each level was written as a resource-based question.

It has been observed that teachers face pressures to make decisions about assessment preparation and practice. With teachers "still bearing the brunt of the responsibility ... it seems likely they would see handing over more ownership for assessment decisions as an abdication of their own responsibilities" (Hipkins et al, 2006a, p. 74). Here, teachers' pragmatic response to the externals is reflected both in data gathered for the study and in the national statistics (Table 14). For example, in the question about assessment 'driving' programmes, RES13b, stated "It did till we dropped the externals." This teacher reflected a critical stance (Louden, 1991) in that she felt that her year 10 students and she as teacher were empowered in the social studies programme once the school no longer offered the externally-assessed achievement standards over which she felt they had no control. On the other hand, through practices referred to as 'credit farming' or 'credit accumulation' (Alison, 2005), students are increasingly reported to be

making choices about where they will direct their energy within the qualifications and assessment system. Accordingly, they are more likely to opt for internally-assessed achievement standards.

The teething problems experienced by social studies teachers implementing the NCEA were exacerbated by the subject's lack of an examination tradition. Thus the teething problems in the initial years were greater for teachers of newly examinable subjects:

... teachers [don't] necessarily understand how to interpret the standard ... [resulting in] frustration because these are very experienced teachers who are used to interpreting the standards in other subject areas It's the way [the writers] intend the achievement standards to be interpreted [that's] really where the learning is. (INF7)

At an abstract level, INF7's concern illustrates the importance of 'constructive alignment' between curriculum, pedagogy and assessment. In Bernstein's terms, the high level of framing of the achievement standards compared with the low level of framing of the social studies curriculum has created tensions for teachers, especially with the externally-assessed standards.

Inconsistencies in the marking of externally-assessed achievement standards were perceived by teachers as a major reason to seriously reconsider offering them to their year 10 students. Some stated that they would prefer to keep to the less problematic internals. This was discussed in the focus group and is illustrated in Vignette 5, below and overleaf.

VIGNETTE 5: THE CAPRICIOUS EXTERNALS – ONE TEACHER'S RESPONSE

PAR2 was so disappointed at the results of some of his students in the externals, especially after reading their scripts, that he wrote a letter to the NZQA to query the marking. In particular, his concern was that his more able students who were arguing at higher levels of thinking (Bloom's Taxonomy) were being disadvantaged in relation to his students who were arguing at more concrete levels.

His concerns about the inconsistencies in the marking of the externals made him seriously consider continuing to offer them to his accelerated year 10 students.

This represented a pragmatic yet strongly ethical response:

"It's like a lottery, and I'm not prepared to put my good students up for that, that's not responsible on my part."

Another constraint that typifies standards-based assessment and which impacts on the internals is the practice of providing templates for students' answers.

5.4.3 TEMPLATING

A characteristic of questions within standards-based assessment tasks in a range of subjects, both the internals and externals, is the provision of templates on which students write their answers. In my original research proposal, I was concerned about the impact this practice had on the values exploration process in that it appeared to turn the process into a comprehension exercise rather than requiring students to really engage with clarifying their own values.

Teachers' responses to Question 6.2 in the postal survey *"Do you use templates for assessing AS90218?"* were generally affirming, with 41% noting "always", 39% "frequently", 12% "occasionally" and 8% "never" or nil response. Therefore 80% of teachers reported that they used templates frequently or always. INF6 considered that the use of templates became popular because many of the online assessment tasks provided on the TKI website used this format. In contrast, PAR2 argued strongly that "students appreciate the security of the familiar layout". Moreover, he reminded the focus group that the internal moderation process required teachers to be able to provide evidence of students having achieved the standard and the template answers provided this is in a very manageable way.

When the teachers in the focus group were challenged to undertake a values exploration study of the Corby case, around the issue "Should the government of one country be able to intervene in the judicial processes of another country?"

PAR2 devoted a much longer period of class time to this issue than the other participants. He devised a sophisticated and imaginative templated assessment activity for his students which required higher levels of thinking, although this was for AS90219, *Decide on social action(s) in relation to a social issue* (Appendix L). He was committed to using templates for reasons of both student security and moderation purposes. PAR2's concerns could be considered technical or problematic interests (Louden, 1991) but were underpinned by a strong sense of responsibility to his students.

INF6 expressed an interest in being involved in more creative forms of internal assessment tasks, more along the lines of the Rich Tasks in the *New Basics Programme*⁴² introduced in Queensland, Australia in 2001 under the leadership of Allan Luke. She recalled that the National Assessment Panel had investigated the possibility of putting together a CD Rom of resources for schools in an effort to develop alternatives to template assessments, but that this had not been followed through.

The discussion now attempts to link teachers' responses to assessment of social studies for the NCEA to Dobric's (2005) typology of qualifications and assessment discourses.

5.5 LINKS TO DOBRIC'S TYPOLOGY OF QUALIFICATIONS AND ASSESSMENT DISCOURSES

The typology provided by Dobric (2005) introduced in chapter two (Table 5), has been useful in the current study. Dobric's research involved key people in the debates in the decade before the NCEA was implemented and her categorisation linked a series of concepts relating to educational ideologies. In the present study, schools' various configurations in offering senior social studies for assessment are now related to the four components of her typology. The 'idealists' identified in chapter three, who were more likely to be offering senior social studies at all

⁴² <http://education.qld.gov.au/corporate/newbasics/pdfs/luke-oct04.pdf>.

three levels, may be considered to be contributing to the 'fulfilment' qualifications and assessment discourse (pp. 94-95). Typically they adopt a humanistic macro-ideology, with a concern for empowerment and growth. As humanists, they are likely to hold educational ideologies that adopt a progressive or social reconstructivist approach.

On the other hand, the 'pragmatists' were more likely to pursue the qualifications and assessment discourse of 'excellence' (Dobric, 2005, pp. 94-95), especially those who were offering the level one achievement standards to their more able year 10 students. This traditional educational ideology reflected the more conservative approach taken in previous decades when social studies' time was used to prepare students for School Certificate history and geography. Teachers offering social studies achievement objectives as a component of a mixed course may be subscribing to a 'usefulness' discourse, intending the combined knowledge to work for the students, that is performativity. If the mixed course included sociology and/or legal studies the intention might be to enable growth and empowerment as part of a 'fulfilment' qualifications and assessment discourse. The fulfilment discourse, linked to the educational ideology of social reconstructionism, bears a strong resemblance to the goals of social studies.

The discussion now turns to an analysis of statistics revealing social studies' share of the 'market' in relation to the other social science achievement and unit standards.

5.6 CURRENT MARKET SHARES - SOCIAL STUDIES WITHIN THE SOCIAL SCIENCES

Social studies has not secured a strong position during its first five years of implementation for either the externally-assessed or the internally-assessed standards. The numbers of students who entered the level one social studies

externals peaked in 2003 (Table 7) and has remained very low compared to the numbers of entries for the more traditional social sciences subjects.

As Table 14 below demonstrates, social studies' share of the entries for the externals has been small representing less than 2% of all the social science subjects, except in the second year (2003) when it reached 2.1%. In contrast, the total contribution of geography began at 40% but has declined over the five year period to 34%, while history has increased from almost 29% to 32% and economics from 30 to 32%. The decline of geography relative to history is also of interest to this study.

TABLE 14: RELATIVE SHARES OF THE FOUR MAJOR SOCIAL SCIENCE SUBJECTS, BASED ON TOTAL ENTRIES FOR EXTERNALLY-ASSESSED ACHIEVEMENT STANDARDS AT LEVEL ONE

Subject	2002	2003	2004	2005	2006
Economics	30.4%	31.7%	31.5%	32.0%	32.4%
Geography	39.4%	37.2%	36.0%	35.0%	34.0%
History	28.8%	28.9%	30.6%	31.4%	32.1%
Social Studies	1.3%	2.1%	1.9%	1.5%	1.4%

Source: Adapted from Baldwin (2007).

Whereas the externals have been recorded as numbers of entries during those years, the internals have been recorded as numbers of students gaining the result of achieved, merit or excellence. The differential reporting of the internals and externals by NZQA began in 2003 when schools no longer had to provide evidence of students who had sat an internal assessment but failed to reach the level of 'achieve'. Changes have since been made to this policy.

Social studies fared considerably better in its share of the internals compared to the externals over the same five year period. Its share increased from 3.8% to 8.7% of the total over the period. Again, geography experienced a relative decline while history experienced a small relative increase as shown in Table 15, overleaf.

TABLE 15: RELATIVE SHARES OF THE FOUR MAJOR SOCIAL SCIENCE SUBJECTS, BASED ON TOTAL RESULTS FOR THE INTERNALLY ASSESSED ACHIEVEMENT STANDARDS AT LEVEL ONE

	2002	2003	2004	2005	2006
Economics	21%	19.9%	19.4%	19.6%	18.3%
Geography	50.9%	49.7%	47.7%	47.1%	46.9%
History	24.1%	24.1%	25.0%	25.0%	26.0%
Social Studies	3.8%	6.2%	7.5%	8.2%	8.7%

Source: Adapted from Baldwin (2007).

At the end of the first five years of implementation, therefore, social studies was still a very minor player within the social sciences learning area, especially for the externals. The greater share of the internals entries could be attributed to schools offering only internals to their accelerated year 10 students (Table 6) as well as the inclusion of social studies' internals in mixed courses, but this would need to be studied further (chapter eight, section 8.4.2).

While the social studies' external entries at level one peaked in 2003 then steadily declined, the pattern differed for levels two and three. Although the total numbers were still very small, the numbers of students entered in the level two and three externals continued to increase each year until 2006 as shown in Table 16 overleaf. On the other hand, the entries for the internals at level one continued to increase from 2002 to 2006 while at level two, the number peaked in 2004 and then fell slightly. At level three, relatively large increases occurred annually from 2004 to 2006.

TABLE 16: LEVEL ONE, TWO & THREE SOCIAL STUDIES TOTAL ENTRIES FOR EXTERNALS AND RESULTS FOR INTERNALS

	2002	2003	2004	2005	2006	Total
Level One						
Externals - entries	1,605	2,608	2,414	1,963	1,865	10,455
Internals - results	2,423	4,068	5,064	5,452	6,108	23,115
Level Two						
Externals - entries		724	1,132	1,303	1,358	4,517
Internals - results		983	1,699	1,564	1,548	5,794
Level Three						
Externals - entries			528	1,043	1,421	2,992
Internals - results			625	1,063	1,393	3,081

Source: Adapted from Baldwin (2007).

Unit standards have also played a role in the assessment activities of students in the traditional social sciences. Table 17, overleaf, reveals data provided for the years 2000 to 2006 to represent the longer history of unit standards, including sociology. History, in particular, offers a very large number of unit standards, with some of these 17 unit standards being in religious history. The total numbers of students gaining results in each of the four subjects over the time period 2000 to 2006 are provided in this table, with the overall percent revealing history to have the biggest share, followed by geography and economics. Sociology has the smallest share, with just 3% of the total.

TABLE 17: SOCIAL SCIENCES LEVEL 1 UNIT STANDARDS - NUMBER OF RESULTS GAINING CREDIT 2000-2006

Subject	2000	2001	2002	2003	2004	2005	2006	Total	%
Economics N=7	1229	837	478	417	1021	1602	2320	7,904	21.8%
Geography N=7	3283	1919	284	364	1404	2129	3122	12,505	29.3%
History N=17	1899	922	1259	2399	3452	3674	4903	18,508	46.1%
Sociology N=6	114	58	87	85	139	239	278	1,000	3.0%

Source: Adapted from Baldwin (2007).

The final table in this series, Table 18 below, provides data on level two and three unit standards which may contribute to mixed social studies courses. Legal studies, offered only for level two and three, has proven particularly popular especially at level two. The yearly fluctuations in unit standards entries for several of the subjects, for example sociology level three, in both Table 17 and 18, is of interest. The fluctuations could be explained by the uptake of unit standards in the development phase in 2000 and 2001, followed by a renewed uptake as part of mixed courses once the NCEA was implemented for level two (2003) and three (2004).

TABLE 18: SOCIOLOGY AND LEGAL STUDIES UNIT STANDARDS LEVEL 2 & 3 - NUMBER OF RESULTS GAINING CREDIT, 2000-2006

Subject	2000	2001	2002	2003	2004	2005	2006	Total
Sociology Level 2	288	278	222	456	812	941	1061	4,058
Legal Studies Level 2	3971	2247	1720	4937	7212	6852	6874	33,813
Sociology Level 3	51	0	0	1	96	241	300	689
Legal Studies Level 3	18	15	14	38	456	799	637	1,977

Source: Adapted from Baldwin (2007).

The national data provided in these five tables clearly place social studies as a minor player within the social sciences learning area during the initial five years. Three schools in the postal survey indicated that they offered both social studies achievement standards and sociology unit standards to their level two and three students.

The relatively small contribution of social studies to the wider social sciences in the senior secondary school statistics may reflect the level of support provided to the new subject by the professional communities of practice. This support is the focus of chapter six.

5.7 CHAPTER SUMMARY

The chapter has provided an historical overview of the transition from norm-referenced to standards-based assessment in general and specifically to the social sciences over a number of decades. The overview has provided a background against which teachers' experiences and resulting responses have either enabled or constrained them from fully implementing level one social studies.

Discontent with the traditional norm-referenced assessment paradigm was evident from the 1960s and through subsequent decades. Debate over the standards-based assessment paradigm has been intense both overseas and in New Zealand. For the social sciences, the evolution to the NCEA incorporated the adoption of both achievement-based assessment and unit standards. The innovation of the NCEA has met with mixed responses within the social sciences community.

The opportunities provided for social studies within the NCEA assessment and qualifications system had the potential to increase its academic status and credibility within the secondary school curriculum. The opportunities included the clarification of *SSiNZC* in the writing of the achievement standards, the ability and further potential of social studies to contribute to course innovation

(especially the internals), and the perceived relative autonomy of the internals. The role of conferencing was considered in relation to the greater achievement rates of the internals. The formal assessment of the values exploration process indicates that the affective domain can be assessed.

In contrast, a number of constraints on social studies have been identified. These constraints include the concern that assessment drives teaching programmes, that the externals are problematic and that the process of templating can have a cramping effect on social studies assessment activities.

Teachers' responses to both the enablers and constraints of standards-based assessment have varied, there has been no one 'voice' evident. The statistics provided in Tables 14 to 18 clearly revealed the results of decisions made by teachers and students. The very low numbers enrolling for the level one externals, falling from 2003 - the second year of introduction - are cause for concern for those in the social studies community. The higher numbers achieving in the internals indicates that social studies contributes to the senior secondary school curriculum in three ways - as an extension activity for year 10 students, as a contributor to mixed courses, and as a full level one to level three senior social studies programme.

The most significant examples of conflicting responses in this chapter arose from decisions teachers make in their daily work lives. In the postal survey, teachers reported conflicting responses to the achievement standards, with some teachers adopting a low trust suspicion of the externals. They were prepared to stop offering the externals due to the difficulties with the setting and marking of the examinations. Other examples included quite varied responses to the question of whether values could be effectively assessed, the adage that 'assessment drives programmes', and the use of conferencing and templates. The pragmatists were more likely to offer their students mixed courses, comprising achievement objectives from various subjects or a mix of achievement and unit standards.

Using Dobric's typology, the idealists were more likely to respond to policy change by subscribing to the 'fulfilment' qualifications and assessment discourse whereas the pragmatists were more likely to subscribe to an 'excellence' or 'usefulness' discourse.

The final combined data and literature chapter, chapter six, now considers the support provided to the contemporary pioneers implementing senior social studies by their four official professional communities of support.

CHAPTER SIX: INSTITUTIONAL FACTORS

TEACHERS' RESPONSES TO THEIR PROFESSIONAL COMMUNITIES OF PRACTICE

6.1 INTRODUCTION TO CHAPTER SIX

This chapter discusses teachers' differing responses in this study to the work of the institutions set up to help them mediate educational policy into classroom curriculum and assessment practice. Three of these institutions are government funded and one is a voluntary teachers' organisation. The MoE and the NZQA were established as the result of the *Tomorrow's Schools* initiative in the late 1980s. They have statutory responsibility for the oversight and implementation of curriculum and assessment respectively. The third institution discussed is that of schools. The voluntary teachers' organisation is the social studies subject association, ANZFSSA.

This is the final in the series of four combined data and literature chapters. The chapter considers the structures or constraints imposed on teachers as the result of institutional requirements. Teachers in the senior secondary school do not work in isolation, nor do they have complete freedom or autonomy to effect change due to the constraints imposed on them by the institutions that govern them. The NCEA is a strongly framed assessment and qualifications system which teachers have to negotiate in their work lives. These negotiations are complex, hence the need for four chapters to present and contextualise various parts of the whole data set. In order to make sense of the whole, the four combined data and literature chapters will be synthesised in the next chapter, chapter seven.

'Communities of practice' was a term coined by Etienne Wenger in the late 1990s. Wenger (1998) was concerned with how the discourses of people who have common occupational interests are generated and maintained; how their work

gets done and how networks facilitate this work. This chapter therefore is the story of the four *professional communities of practice*, considered in this study to be the MoE, the NZQA, secondary schools and ANZFSA. These communities have been chided by Elley, Hall and Marsh (2004) for not providing sufficient co-ordinated support for teachers in the initial years of the NCEA.

6.2 THE MINISTRY OF EDUCATION

The MoE was established on 1 October 1989, replacing the former Department of Education [DoE]. This section is subdivided into two sections, both of which focus on the professional development obligations of the MoE for teachers implementing the NCEA. The first section considers the professional development more generally, while the second section considers the contribution of an initiative aimed specifically for new subjects within the NCEA, the Beacon Schools' Project.

6.2.1 PROFESSIONAL DEVELOPMENT AND SUPPORT

Many teachers working in schools prior to 1989 have fond memories of week-long refresher courses (held at venues such as Lopdell and Wallis House) under the Curriculum Division of the former DoE (Vossler, 2002). With reference to the social sciences, the leadership provided by the Curriculum Development Unit of the DoE, especially to the National History and Geography Curriculum Committees in the 1970s and 1980s, especially by Chris Davidson, has been lauded (Chalmers, 2005).

The professional support provided by the MoE in more recent years has been of shorter duration and provided in two modes: face-to-face and electronic. Whereas under the DoE there was a full-time staff member dedicated to each curriculum area, this has not been the case under the MoE.

Academic analyses of professional support vary. The lens provided by critical social science researchers, for example, is that professional development involves

the hegemonic state persuading teachers to adopt new practices or paradigms (O'Neill, 2005). This persuasion tends to be seen as 'top down' (Elley, 2004) with teachers not considering they have ownership of the change. Judie Alison's work has shown that teachers tended to forget about discussions that took place within their union, the NZPPTA, about a desired change to standards-based assessment when the new policy was introduced. This has been termed 'professional amnesia' (Alison, 2006). It is also argued, normatively, that the greater the involvement of teachers in policy change, the greater sense of ownership and buy in. Teachers' professional learning is thus enhanced (Aitken, 2006).

In the context of this study, the MoE was charged with the responsibility of contracting the expert panelists to write the achievement standards in 1999 (chapter five, section 5.3.1), and organising professional development to support the introduction of the NCEA (professional development days occurred between 2001 and 2003), as well as on-going support since then especially for teachers new to the country. This support has been both electronic and face-to-face.

As indicated in chapter three, the majority of the teachers who responded to the postal survey reported that the subject for which they had attended NCEA training days was not social studies (61%). Of these, the most popular subject was geography. Only 22% of the teachers reported that they had attended all social studies days and 17% some social studies days. Five teachers responded that they had not attended any NCEA training days, despite the MoE offering on-going professional development for teachers new to the country or returning to teaching (RES37 had attended one of these). Two teachers had learned about NCEA during their initial teacher education. Of the focus group, two had attended geography, one history and one had not attended any days.

The electronic support provided by the MoE has mostly occurred through the TKI website with exemplars of assessment tasks provided within the NCEA community pages. The *SSoL* units of work have been available for years 11 to 13

(NCEA levels one to three). These were written during the early years of NCEA development (2001 – 2003). The decision by the MoE in December 2003 not to renew their contract with UNITEC has meant that no new units have been written for this site, nor have units and links to other websites been updated since this time. When asked what were their main sources of information in Question 3.6 of the postal survey, 23% of the respondents ticked *SSoL* website. In response to Question 4.1, “*What topics or contexts have you used for teaching and assessing AS90218?*” 39% referred to *SSoL* units.

While the *SSoL* site has remained active it has not been updated other than in minor ways since 2004. The site’s forum for teachers was also discontinued. The result for senior social studies teachers was a potentially useful but flawed site. For example, PAR3 (phase two) had sourced the AS90218 achievement standard via a link to an online unit but received an outdated version of the achievement standard. RES10, as a beginning teacher, pleaded for provision of more online units for senior social studies.

Two reasons for the cancellation of the contract for *SSoL* have been ascertained. One perspective given for the cancellation was that the site was to be reconceptualised.⁴³ Another reason related to legal requirements and the contestable nature of the work. The changes proposed to the site varied from the original contract which had to be renegotiated. These changes included aligning to the new curriculum and to the results of the *Best Evidence Synthesis* in social sciences⁴⁴, both of which were eventually published several years after the *SSoL* site was abandoned. The *English Online* site, meanwhile, was allowed by the MoE to continue and flourished, being a vital site for English teachers. On-going issues about the redevelopment of this site are discussed in the postscript (chapter eight, section 8.7.1).

⁴³ Coogan, P., pers. comm., March 2007.

⁴⁴ Cubitt, S., pers. comm., 15 January, 2008 & 29 January 2008.

Face-to-face professional support was considered imperative by teachers in this study. The focus group teachers and INF5 all commented on the importance of personal contact. They also argued that paper copies of information were vital as well as having material provided electronically.

From the postal survey conducted at the end of the data collection period, it was evident that one-third of teachers had created their own networks, having a 'buddy' teacher at their own or another school. Less than one-fifth were in regular contact with a social studies adviser and the same proportion noted that they felt professionally isolated. The most frequently quoted sources of "*on-going professional development*" (Question 3.2) are summarised in Table 19, below.

TABLE 19: ON-GOING PROFESSIONAL DEVELOPMENT **N=55**

I have a senior social studies buddy within my school or from another school	34.5%
I am in regular contact with an adviser in senior social studies	18%
I feel professionally isolated	18%
I get support from my local social studies association	11%
I have been involved in the Beacon Schools' Project	9%
I am involved nationally as a lead teacher	3.5%
No response	5.5%

NB: Some teachers made more than one response to this question.

Source: Postal Survey Question 3.2.

There were 17 volunteered comments in response to Question 3.2 which revealed very conflicting responses. These ranged from a level of anger and frustration through to a sense of self-efficacy. On the negative side were comments such as "What PD?" (RES26b), "There seems to be ongoing frustration at the lack of PD where people feel confident in what they are doing and what is expected" (RES8), "Given my understanding, it is difficult to get any" (RES22), and "Had a very negative experience with an adviser in 2005" (RES27). In contrast, RES15 noted "I felt professionally isolated so I sought help from the HoD social studies at the

neighbouring school.” Two noted that they were experienced social studies teachers and didn’t need much help (RES12 & 19), while one commented that “An adviser is readily available if required” (RES36) and one “Get support through TEAM Solutions through a Literacy Coordinator who is interested in social studies and literacy developments” (RES23). This response represented a higher level of volunteered comments than were elicited from other questions, suggesting that teachers felt very strongly about this issue.

Over the study period, the level of advisory staff for senior social studies has been limited. The number of advisory staff appeared to be one full-time adviser in Auckland and one person in each of Wellington and Christchurch for whom senior social studies has been a small fraction of their workload. Teachers in the focus group lamented the lack of secondary social studies adviser in the central North Island. Three of the focus group teachers had a senior social studies buddy in their school (though one’s buddy was on study leave), one was in a Beacon School, and one felt professionally very isolated. Two had informally approached a lead teacher at a school some distance away for support.

The situation illustrated in Table 19 reflected what occurred with the introduction of social studies in the secondary schools in the 1950s. For example, Fargher noted that support for the early pioneers was only available in the major centres (interviewed in Openshaw, 1991). He affirmed Clarence Beeby’s claim that “teachers will take an idea, adapt it and make it work” though not necessarily in the way that policy makers intended (p. 27). During social studies’ initial years, support from the DoE was considered to be insufficient and sporadic (Keen, 1979; Meikle, 1959a; Openshaw, 2004; Whitehead, 1974), and teachers’ refresher courses were few and far between. For example, the initiating teachers’ refresher courses for secondary school teachers of social studies were run in 1945 (when many of the male teachers were still returning from World War Two) and it was not until 1959, 14 years later, that the second courses were held. This time lag was considered by Charlie Herbert (interviewed in Openshaw, 1991) to be the cause

of the subject's "stuttering start" (p. 10). Resources published by the DoE such as the *Post Primary School Bulletins* tended to reflect a focus on the discrete social sciences rather than the new, integrated subject (Couling, 2005). The result was that the majority of social studies teachers taught the subject as introductory history and geography (as already discussed). Renner (1976) noted that key sources of information for new innovations were the HoD and the appropriate lecturer at the local teachers' college.

The issue of professional isolation has been already been discussed in chapter three. The professional conversations held by teachers have been claimed to serve a very important role of support and development. "Teacher conversation groups constitute a low-cost, sustainable, satisfying, and potentially transformative form of teacher professional development" (Clark, 2001, p. 172). For teachers such as PAR2 who have been the only teacher of senior social studies in a school, the lack of the opportunity to 'talk shop' and to confer over the myriad of technical as well as bigger picture decisions in implementing a new subject is a concern. PAR2 lamented the lack of a 'go-to' person or expert in the region when needing help. The research group comprised his sole source of support in 2005.

Others, charged with supporting teachers, also expressed their frustration:

What worries me the most, there aren't the range of examples of good contexts and powerful learning out there ... it's not surprising that some teachers are using material that we would regard as being potentially flawed, because there isn't anything else out there and that's what they're using for guidance. (INF7)

The focus group teachers agreed that a minimum of two days face-to-face professional development each year was vital for them to keep abreast of changes. This is the amount of time suggested as a recommendation to the MoE as a result of the *Teachers' Talk about NCEA Report* in 2005 by NZPPTA (Alison, 2005). The research involved interviewing 105 teachers in late 2004, the end of the three year 'roll out' period for the NCEA. Recommendation Four stated:

At least two days per year of Ministry-funded professional development for every teacher, focused on the NCEA and largely subject-based, be provided each year for at least the next three years, starting in 2005. This professional development must enable teachers to work with colleagues within their own schools and with colleagues in other schools... (p. viii)

Such professional development has not occurred. The school represented by PAR1 did offer one hour per week for this purpose. Teachers of senior social studies often have another subject so have to make choices as to what professional development to attend.

Concerns about the need for more professional development for the whole learning community of senior social studies were expressed by INF 5 and 7 and by the focus group members. The need for more hui, in which the whole senior social studies community could come together, either nationally or regionally, with both lead educators and classroom teachers, so that all were 'on the same page', was strongly advocated:

Because we are such a small community, we really all need to be on the same page to the extent that we are conversing and discussing and debating constructively What is very much required is more regular national meetings of all stakeholders ... drawing people together face to face is really critical ... it's all about building relationships, building trust. (INF7)

The emphasis was on the whole community - officials, lead educators and classroom teachers. RES20 also articulated the concern expressed by INF7:

We have lacked any meaningful national discourse on how senior social studies could be rolled out. There has been a tendency to 'barrow push' and dismiss approaches not in agreement with your own, and not seek a common understanding of aims and applications. This has been repeated in the moderation system.

Ideally this national debate should have occurred early in the implementation process. The failure of the professional agencies to engage the community in such discussions has resulted in groups following different leads, therefore creating a level of dysfunctionality within the community.

The following section looks at one group that was established by the MoE to create a community of learners, the Beacon Schools' Project.

6.2.2 THE BEACON SCHOOLS' PROJECT

Beacon Schools' Projects were established for subjects that had not been previously involved in the senior school assessment and qualifications system. Subjects such as social studies and drama met the criterion and, in addition, home economics was included (Hipkins, Conner & Neill, 2006a). Based on a UK model, the idea was to 'shine the light of good practice' and grow expertise. Ten senior social studies teachers, mostly in schools in the North Island, were identified in 2003. The project ran for three years, 2004 to 2006, with some further funding for professional development available in regions until June 30, 2007.⁴⁵

As INF2 observed, "The model used in the Beacons is very effective and it's been very successful", with Beacon Schools providing leadership in communities and acting as a magnet for other schools who considered implementing senior social studies:

People like the woman from X high school already has calls from her local region for help and is immediately talking through stuff, sharing resources, discussing appropriate contexts for study, that kind of thing ... so I think it's slowly moving and the teachers are keen to see what they can do in their communities. (INF5)

Six teachers who responded to the postal survey indicated that they had been involved in the Beacon Schools' Project. Typically these teachers had first offered level one social studies in their schools in its first year, 2002, and were at the time of the study offering a full programme of level one to three which involved more than one teacher in the department. This information is shown in Table 20, overleaf.

⁴⁵ Jones, P., pers. comm., 12.06.07.

TABLE 20: RESPONDENTS INVOLVED IN THE BEACON SCHOOLS' PROJECT

N=6

School	NCEA training	Year started	Levels offered	Type of course at Level one
16	All social studies	2002	1-3	Full course year 11 & some AS's year 10
18	18a All social studies 18b No NCEA training	2002	1-3	Full course year 11
20	All social studies	2002	1-3	Lower ability year 11 - mix of AS and US internals
22	Some social studies & some history	2002	1-3	Full course year 11
24	All social studies + initial teacher education	2005	1-3	Full course year 11
28	28a & b All social studies 28c Some social studies	2002	1-3	Full course year 11

Source: Phase Three: Postal Survey, Questions 2.1-2.4, 3.1.

The reality of this initiative for many teachers, however, did not meet the expectations. It was anticipated that seven units of work would be written during the project and published on-line for all teachers of senior social studies by 2006 (INF5). This did not occur for reasons of quality assurance and intellectual property rights of the MoE (INF5) (postscript, chapter eight, section 8.7.1).

Frustrations were expressed by both Beacon and non-Beacon School teachers.

For example, in April 2005 INF1 was very angry:

I'm really getting to the frustration stage now. I put a hell of a lot into beacons last year and right now at the end of term one, I've got nothing back [from other beacons' teachers]. I've got a few vague outlines and I expected a heck of a lot more from the effort I've put into it.

A non-Beacon School teacher lamented the lack of sharing, with a 'them and us' situation arising - "Beacons [resources] very poorly shared with non beacon schools" (RES25). Yet, the important role the Beacons' Project played in their members' own implementation experience was expressed by RES16 "Without the Beacon Schools' group I would have been completely in the dark!"

A combination of out-dated units on *SSoL* and the lack of sharing of Beacons' resources resulted in senior social studies teachers having to be highly resourceful, as was described above in chapter three, or else having to use resources that would not set their students up well for success in high stakes assessment.

While teachers have been critical of the lack of professional development offered for senior social studies, it has also been commented that some have been reluctant to take up the opportunity when it is offered, with some professional development days funded by the last of the Beacons' funding having to be cancelled due to lack of support.⁴⁶

The role of the NZQA in supporting teachers of senior social studies is now considered.

6.3 THE NEW ZEALAND QUALIFICATIONS AUTHORITY

In the early years of the NCEA there appeared to be confusion between the roles of the MoE and the NZQA (Brooking, 2006). The MoE was responsible for contracting the expert panellist to write the achievement standards, the facilitation manuals for the training days, the online assessment exemplars and for on-going professional development for teachers. Meanwhile the NZQA was charged with administering the assessment and qualifications system in an equitable way, such as setting up moderation procedures for ensuring consistency between schools and subjects, as well as overseeing the writing and

⁴⁶ Jones, P., pers. comm., 12.06.07

marking of the externals. The discussion in the next two sub-sections focuses on two roles of NZQA, the internal moderation system and the dissemination of information.

6.3.1 THE INTERNAL MODERATION SYSTEM

Teachers in the focus group expressed a strong sense of opposition to the anonymous moderation system introduced for the internally-assessed achievement standards within the NCEA. This differed from the system used with the original unit standards trial whereby moderators would make phone contact with teachers to talk through issues about assessment tasks.⁴⁷ The current purpose of moderation was seen by some as an audit, with moderators being required to assess whether the task met 'the standard' as set out in the achievement standard (INF2). A more mixed response came from teachers in the postal survey, however. In response to Question 6.4 *"Do you find the moderation system for the internally assessed standards fair and helpful?"*, 52% replied "occasionally" and 24% "frequently." Three teachers noted that they had not yet been moderated for AS90218 and another three did not respond.

Only four teachers in the postal survey (phase three) ticked "never" (10%). These four teachers were extremely unhappy with the system, with three of them commenting particularly on the lack of consistency between moderators (RES5, 27 & 37). This represented another strong example of conflicting responses. The discontent with the moderation system resonated with the findings of the *NZCER National Survey of Secondary Schools* conducted in 2006, in which two-thirds of teachers' responses were in agreement with the statement *"NZQA moderation feedback is often unpredictable"* - 24% of teachers strongly agreed while a further 39% agreed - while 26% were neutral/not sure and 10% disagreed (Hipkins, 2007b, p. 67). Further, INF6 noted that there was a lack of communication between the moderators of the internals and those of the externals in social studies in the initial years.

⁴⁷ Researcher Experience, Geography Unit Standards Trials, 1995-1996.

RES27 was considering no longer offering AS90218 after her negative moderation experience as it:

... makes me feel very inadequate and insecure in my teaching which is bad for the profession I began with enthusiasm and intended to introduce more and more papers as the courses settled down - instead I am disillusioned as every year my 'one' paper was called up for moderation and no matter how much it is adjusted and changed, it's always inadequate. This reflects on me as a teacher and gives me no encouragement to plod on.

In contrast, a lead educator who was a moderator as well as a classroom teacher responded in a much more proactive manner. She considered that as a teacher, it was her professional responsibility to ensure that assessment tasks met the explanatory notes of the achievement standard and to remedy tasks that did not pass the moderation process:

I think it's quite fair that they've identified areas which don't reach the standard and then for me as a professional it's my responsibility to work out how to rectify it I mean I'm paid a fair whack each year to make sure I get it right. (INF2)

Two teachers who responded to the postal survey noted that the moderation system for social studies was less consistent than for their other social science subjects. This issue was also raised in the focus group, in which the participants expressed their confidence in their parent disciplines with a longer assessment history. PAR2 noted that "everyone [in the history community] knows what is meant by certain terms and instructions", whereas focus group members considered that the lack of a specialised language and clear expectations in the newer social studies subject diminished their sense of self-efficacy and ability to prepare their students effectively for the externally assessed achievement standards. Discussion about a specialised language and parameters continues in the next section.

6.3.2 DISSEMINATION OF INFORMATION

Bernstein (1996) distinguished between "the normative - what should occur - and the actual, based on teachers' sense of enhancement, inclusion and

participation” (p. 7). Bernstein was concerned about factors which inhibited or constrained teachers’ equity of access to information about educational change. Any changes to the regulatory codes (that is, centrally imposed rules) must filter through to teachers who enact the instructional codes (that is, classroom teaching). The effective dissemination of information is therefore critical.

One of the roles of NZQA is to provide feedback to teachers about the results of their students’ responses in the examinations. The *Examiners’ Reports* were a feature of the previous qualifications system for School Certificate and University Bursary examinations and were regarded as a valuable source of information to improve outcomes for students.⁴⁸ *Examiners’ Reports* are also provided for levels one to four NCEA subjects. The level of feedback, however, is much less detailed.

Positive responses to *Examiners’ Reports* for senior social studies included “They are worded in very positive terms, because they have to be, that’s an NZQA requirement” (INF7) and praise for the 2003 *Report* by the focus group teachers. At that early stage teachers were searching for guidance on suitable contexts for study and concrete examples of acceptable student responses, which the 2003 *Report* reportedly provided. This exemplified Layton’s (1972) descriptor for stage two that “The internal logic and discipline of the subject is becoming increasingly influential on the selection and organisation of the subject matter” (p. 11).

Criticisms of later *Examiners’ Reports*, however, by the focus group teachers concluded that the *Reports* were too focused on the positive and “too cryptic and couched in jargon” (PAR2), with insufficient guidance for teachers struggling with a new subject. INF7 noted that helpful comments from individual markers tended to get diluted when the final report was compiled. The late arrival of the *Reports* into schools (that is, about May each year) was also seen as a concern by focus group teachers who noted that they would have completed teaching one-third of their yearly programme by then. PAR1 also expressed anger at the

⁴⁸ Researcher observation as HOD geography 1990-2000.

lateness of the examination specifications for the same reason – they had just been received the week of the first session on 16 May 2005 for that year. INF6 noted that they could be distributed much earlier as they were written at the end of each year.⁴⁹

This emphasis on what could be described as technical detail (Louden, 1991) or a technocratic/reductionist conception of teaching (Codd, 1997) overlooks the strong sense of responsibility and professionalism expressed by the teachers in the research. Their view was that was part of their professional responsibility to prepare their students effectively for high stakes assessment, as strongly expressed by PAR2 (Vignette 5). For example, the inconsistent and at times non-existent definition of terms used in senior social studies was problematic for teachers (Vignette 1). PAR5 pointed out to the focus group (phase two) that in the rolling reviews of the achievement standards by NZQA, terms like ‘a range of’ were not used consistently from level one to level two to level three. These rolling reviews, undertaken one level per year by the NZQA provided a short term focus (INF7). Such technical details as this are of major concern to teachers. By problematising them during the focus group days, we could move to a greater shared understanding and the subsequent empowerment of the teachers and their students.

The need for a specialised social studies language was addressed by a hui hosted jointly by officials from the MoE and NZQA in March 2006 to bring together lead teachers in order to clarify the use of the term ‘perspectives’. This term is used in history, geography and social studies but with subtly different meanings. In social studies, the term is especially used in relation to the values exploration process. This hui was in direct response to research done during the Beacon Schools’ Project (INF5). Since the study period, the *Guide Notes on Perspectives* has been updated and *Guide Notes on Concepts* and the *Guide Notes: Social Studies*

⁴⁹ They are now disseminated much earlier in the school year.

Values Achievement Standards have been published online.⁵⁰ These once again represent the social studies community's effort to develop its own "internal logic and discipline ... on the selection of subject matter" (Layton, 1972, p. 11).

The process as it affected the focus group is outlined in Vignette 6.

VIGNETTE 6: DEVELOPING A SPECIALISED SOCIAL STUDIES LANGUAGE - *THE PERSPECTIVES*

Throughout the period that the focus group was meeting, there was on-going discussion within the social studies community about the role of the perspectives. Five social studies perspectives were listed in *SSiNZC*, and were incorporated into AS90218. In the 2003 version of this achievement standard, they were listed as Māori and/or bicultural, multicultural and/or gender and current and/or future. The 2004 version of the achievement standard simplified them to "one of Māori perspectives, bicultural perspectives, multicultural perspectives, gender perspectives, perspectives on current issues, and perspectives on the future". Māori perspectives had not featured in *SSiNZC*.

The debate was complicated by the fact that the historians and geographers also use the term perspectives, but with slightly different connotations.

Focus group members commented that "*experienced teachers are struggling ... there is no model for how to go about teaching the perspectives, but there are good models in history and geography ... ideas are just picked up, it is a patchwork quilt approach rather than a whole process.*"

⁵⁰ Guide Notes on the Assessment of the Perspectives
http://www.tki.org.nz/r/ncea/socstud-perspectiveguidenotes_28feb07.doc
Guide Notes on the Assessment of the Concepts
http://www.tki.org.nz/r/ncea/socstud-conceptguidenotes_28feb07.doc
Guide Notes: Social Studies Values Achievement Standards
http://www.tki.org.nz/r/ncea/socstud_valuesresource_12jun08.doc

We were able to access *Notes on the Perspectives* (Wood, 2006) which we discussed at length but the teachers were still not convinced by the differentiation provided between the terms viewpoints, values positions and perspectives.

At the next meeting, PAR2 commented that he had received, as Principal's Nominee, an NZQA Update with an article about the social studies perspectives. Not all of the group had accessed this paper at that point in time. PAR1 found it on a coffee table in her staff room.

Since then, work has gone into reworking the achievement standards to clarify the role of the perspectives. This vignette illustrates the struggles the fledgling subject has undergone to clarify its specialist language and to disseminate the information to the whole community.

When asked in the postal survey in November 2006 if they had accessed the NZQA Update with the *Guide Notes on the Perspectives* paper, just under three-quarters of the respondents responded positively (74%). A variety of responses to the document was reported by classroom teachers in the postal survey (Question 4.3). Fewer than 50% of the respondents considered that the document had clarified the issue for them. Volunteered comments ranged from "Confirmed our thinking and understanding" (RES28a, b & c) and "The guide notes helped 'unpack' the perspectives, the SSiNZC document did not" (RES22) to "Still needs greater work to apply effectively; values/perspectives still confuse students" (RES4) and "Still unclear on how specific students need to be when writing about the five perspectives" (RES26a). RES20 argued the point strongly:

I don't believe when the curriculum was written, the writers thought that the perspectives would be used as a defining tool for deciding whether students had achieved a standard – their presentation is too inconsistent for that, so the paper was long overdue, and the difficulty should have been realised even before the first standards were assessed.

Finally, INF7 considered that the writing of the *Guide Notes on the Perspectives* in 2006, together with a stated intention of rewriting the notes in 2007, represented the typical knee-jerk reactions which were occurring during the implementation of senior social studies. While it was significant that the MoE and NZQA were working together on this initiative, the leadership of the community needed a strong vision that all could share. Focus group teachers expressed the opinion that they felt 'out of the loop' and disempowered in the teaching of social studies due to the lack of clear definitions and infrequent dissemination of information. The 'in the loop' versus 'out of the loop' mentality represented another example of conflicting responses to NCEA social studies.

As the above discussion shows, teachers' responses to the role of the NZQA often focused on the specific and technical. In the process of articulating their frustrations, the focus group teachers were able to address personal, problematic and critical dimensions (Louden, 1991) practically as they worked through the technical difficulties and came to conclusions which they believed were empowering for them and their students.

The third institution for teachers of senior social studies, one with a more overt influence on a day-to-day basis, is their school.

6.4 SCHOOLS

The attitude of schools, especially the decision makers such as the senior and middle managers, have an enormous impact on which subjects are deemed worthy for inclusion in the school curriculum. There are no compulsory subjects in the senior school curriculum (other than NCEA literacy and numeracy requirements). Subject offerings become highly contested within the social-field of the school, with HoDs competing over scarce resources (O'Neill, 2000). It is a site of struggle in which various interest groups also compete (Openshaw & Archer, 1992; O'Neill, 2004). The role of the senior management teams and then the school subject departments are now considered.

6.4.1 SENIOR MANAGEMENT TEAMS

Senior managers make decisions about the allocation of scarce resources. The decision to add a new subject to an already crowded senior curriculum is highly contested. Principals were found by Hipkins (2007b) to be highly supportive of the NCEA in general, with 51% expressing strong support and a further 38% support (p. 65). In this study, however, the senior management teams' level of support for the fledgling senior social studies varied.

Teachers' responses to Questions 1.5 and 1.6 in the postal questionnaire about the status of senior social studies were quite similar. Question 1.5 asked *"What do you consider to be the status of senior social studies in your school compared with other social sciences?"* Sixty three percent of the respondents considered that senior social studies enjoyed the same status, 34% that it had lower status and 3% higher status. In response to Question 1.6, *"What do you consider to be the status of senior social studies compared with other NCEA subjects?"* 57% of the respondents replied "same", 40% "lower status" and 3% "not relevant". Teachers in the postal survey offered a range of attitudes they perceived to be held by senior management teams towards senior social studies. RES25 perceived the subject to have low status:

We are often timetabled to catch those who school doesn't cater for – i.e., we were timetabled with subjects such as physics, music, photography etc! It is seen as less of a priority compared to the other core areas – has less funding and more part time teachers.

Feeling supported at school, RES18a noted a different response:

We have been lucky in that senior management have supported senior social studies. We have had good support from the students as we have made a strong distinction between the material in senior social studies and the other social science subjects.

In contrast, after several years of a high level of support to develop a successful programme, RES28a noted that a change in the school's senior management team had major consequences for senior social studies. This was a Beacon School, and the HoD had been active in assisting teachers within her region who wished to

introduce senior social studies.⁵¹ The change in the senior management team meant that the future of the subject in that school was uncertain. “A new principal and senior management team and the new curriculum have changed our school climate and created more uncertainty” (RES28a).

Some contemporary pioneers had struggled to establish their subject in an already full senior curriculum. INF1 had:

... overcome the battles within the school, I’m now an accepted subject even if I’m being blamed by Y for only having one history class [left]. I think there is room for level one history, geography and social studies if they are taught properly and made interesting to our students.

It is significant that this teacher used the phrase “I’m now an accepted subject”, revealing a strong personal identification with the subject whose success she acknowledged was due to her strong personality - “It is personality-led.” This comment resonates with reports of the early pioneers, women with strong personalities who were keen to achieve change.

Meanwhile, an HoD of another school was struggling with her principal’s inability to decide whether to offer level three social studies or not. If not, the viability of level two was in doubt (PAR1). RES7 explained that social studies was a low status subject in the school, “A Cinderella level in the school.” Similarly, RES15 commented, “Appears to be a poor relation with students and teachers. Not seen as a career path option.”

Low status was reinforced by the lack of a clear pathway towards university study as there is no subject called ‘social studies’ at university. Nor is there a scholarship examination in social studies. Although in his three stage model, Layton (1972) did not use ‘university status’ as a descriptor, “acquisition of university status” was later added to stage three by Openshaw and Archer (1992, p. 56). The concerns about such lack of university status were noted by both the focus group and in some volunteered comments in the postal survey (Question

⁵¹ Researcher observation & discussion 12.06.07

7). ANZFSSA has attempted to lobby for scholarship status but numbers are regarded as insufficient.⁵² Social studies has, however, made it onto the Vice Chancellors' esteemed list of subjects for entry to university (Bolstad, 2006).

The phrase 'anyone can teach social studies' coined by early pioneer Meikle (1994) reflects the attitudes that some senior staff have anecdotally taken to staffing social studies classes over the decades. Several comments in the study data challenged the basis of this perception. High levels of teacher capability were reportedly required, as discussed above in chapter three. For example, "It is getting harder for 'just anyone' to teach social studies without significant upskilling" (RES6). INF1 was adamant in this regard.

We end up with too many teachers teaching social studies who aren't trained so they don't know what the heck they are doing. They don't come to faculty meetings because they've got their own faculty to go to. They base their teaching on what sort of teaching they've had and that's now gone, but then that's how a lot of principals see social studies - as not important.

The role of subject HoDs and HoFs are also important in allocating scarce resources, including decisions about staffing. It is likely that in staffing choices, principals and HoDs select staff according to their strengths in their parent social science discipline rather than in social studies (PAR2).

6.4.2 SUBJECT DEPARTMENTS

The role of the HoD or HoF in supporting innovation and achieving change was highlighted by Renner (1976). The HoD or HoF often has to juggle competing demands from the component subjects in his/her department. The HoD is both a leader and a member of the team (department or faculty) who deals daily with both certainties and uncertainties (O'Neill, 2000). HoDs frequently need to "resocialise teachers into a new subject loyalty" (Bernstein, 1971, p. 55) which is not easy when they have allegiances to two or more senior subjects (Table 9). Social studies has a long history as a low status subject in that it has not been

⁵² Taylor, R., 2003, Letter to G. Tasker & response; Milligan, A., Email to ANZFSSA Executive to support lobbying for scholarship status.

perceived as a “meal ticket subject” (Northover, 1980, p.16), unlike mathematics (Openshaw, Lee & Lee, 1993).

Subject departments have an administrative, curricular and social role. There is a status and hierarchy associated with departments in secondary schools who compete with each other for scarce school resources such as money, time, space and specialised staff (Goodson & Marsh, 1996; O’Neill, 2000). It is difficult to advocate for the inclusion of a new subject such as senior social studies within an already overcrowded senior school curriculum when there is uncertainty over its nature, parameters and potential. The territoriality experienced by the early pioneers has re-emerged with the introduction of senior social studies.

The practice of offering level one social studies to year 10 students in order to provide NCEA experience before encouraging the students to proceed with the more traditional social science subjects history and geography in year 11 has already been highlighted (Table 6). For both PAR2 and PAR3 this practice constituted “a numbers game” with concerns about the low numbers in the social sciences in the senior school generally. Similar sentiments were expressed in the volunteered comments in the postal survey Question 7 about the intentions of schools to offer senior social studies over the following five years from 2007.

The fourth professional community of practice is the voluntary organisation which represent and advocates for social studies – ANZFSSA.

6.5 AOTEAROA NEW ZEALAND FEDERATION OF SOCIAL STUDIES ASSOCIATIONS

Voluntary subject associations have provided an important support and advocacy role for teachers. Although these subject associations are often narrowly focused, they tend to heighten subject loyalty and the identity of group members (Mutch, 2003). Ivor Goodson’s assertion that subject associations “often develop at particular points in time when there is an intensification of conflict

over school curriculum and resources and over recruitment and training” has been reinforced (McCulloch, 1992, pp. 166-167).

In New Zealand, the national body ANZFSSA was established in 1986, though regional associations had begun much earlier, for example the Auckland association in 1960 (Herbert, interviewed in Openshaw, 1991). ANZFSSA was founded 16 years after the geography teachers’ group the New Zealand Board of Geography Teachers [NZBoGT] was established in 1970 (Chalmers, 2005). Notably, ANZFSSA was formed before the New Zealand History Council which was not established until 1990 and was subsequently renamed the New Zealand History Teachers’ Association [NZHTA] in 1994 (Taylor, 2005). Although both Openshaw & Archer (1992) and Barr (2000) were sceptical that social studies would ever reach stage three of Layton’s (1972) model, in fact Layton regarded the descriptor “Teachers now constitute a professional body with established rules and values” (p. 11) as exemplifying the third stage – that of “acceptance and maturity” (Taylor, 2005, p. 170). Indeed, social studies has had such a professional body longer than the more traditional subject, history.

ANZFSSA has enjoyed years of strength and effective advocacy, especially during the heady curriculum battles of the 1990s. One example is a discussion held by members in 1996, which advocated that one social science subject be made compulsory at year 11. A letter was subsequently sent to the MoE by the ANZFSSA President requesting that the National Curriculum document page nine be changed to read:

In year 11 (form 5) students will be offered a wide choice of courses. They will be required to undertake a minimum of six subjects, four of which will be English or Maori, Mathematics, a Science subject and a Social Science subject (a list of possible social science subjects, not just Social studies, was appended).⁵³

On the same day, the ANZFSSA president Paul Keown sent a letter to the MoE offering members’ help with the writing of unit standards in social science unit

⁵³ Keown, P. Letter to N. MacDonald, Curriculum manager, MoE, 04.07.1996.

standards such as legal studies, sociology and psychology. The formation of an identity as social scientists was requested by Cubitt (2005) when curriculum developments encouraged the various social science 'camps' to start communicating and working more closely together, starting with the CMP hui in November 2003. Social studies advocates were prominent in organising the resultant combined social sciences conference in September 2005.⁵⁴

In this study, teachers of senior social studies did not report a strong reliance on their association. In terms of information to support the teaching of senior social studies, no one reported that they referred to the association's journal, *The New Zealand Journal of Social Studies*. A small proportion (11%) reported that they received on-going professional support (Question 3.2) from their local social studies association, with one teacher specifically mentioning the Waikato Social studies Association (RES7). In contrast, RES10a noted that "More [is] needed - neglected area of teacher associations". The Manawatu teachers in the focus group lamented the fact that their local association had not been active during recent years. Two did attend *SocCon2005* which included a two hour workshop on senior social studies.

The fortunes of ANZFSSA have not been as good in the early 21st century as they were during the period of curriculum and assessment developments of the 1990s. For example, an attempt by ANZFSSA to create and distribute a CD Rom of resources⁵⁵ has not eventuated due to the advocate's career change. As a result, this voluntary group of social studies teachers and educators which was set up to support and advocate for its members has not been able to fill the gaps vacated by the bureaucratic institutions since the late 1980s.

⁵⁴ Taylor, R. Researcher experience as conference director, *SocCon2005*, 24-28 September 2005.

⁵⁵ Pipe, J. ANZFSSA AGM 1.04.06.

6.6 CHAPTER SUMMARY

The chapter has examined the four professional communities of practice that support teachers in their implementation of NCEA level one to three social studies as a new subject in an already overcrowded senior secondary school curriculum. The four institutions are the MoE, the NZQA, schools and the subject association ANZFSSA. Teachers' responses to the nature and level of the support, or lack thereof, has been a focus of this chapter.

The MoE had responsibility for setting up the expert panels for writing the achievement standards and for writing the documentation for the NCEA training days in the early years. The MoE has had a continuing role in providing NCEA training for teachers new to the subject or to the country plus on-going professional support. Some of this support was electronic, such as the TKI website which hosted the *SSoL* site. The contract for this site was not renewed from 13 December 2003, so it has remained dormant in the crucial intervening years. Nevertheless teachers have continued to use the site in the absence of other suitable resources for senior social studies (Table 11). The MoE also provided funding for the Beacon Schools' Project with the aim of growing good practice. The unit plans and assessment activities produced during this project were not distributed to the wider community. Teachers considered a minimum of two full days of professional development was required each year in senior social studies.

The NZQA is charged with administering assessment nationally. This involves examiners writing and marking the externally-assessed achievement standards. NZQA also administers a moderation system for the internally-assessed achievement standards, which provoked negative responses from the teachers surveyed in this study. The dissemination of information from the NZQA, through annual *Examiners' Reports*, *NZQA Updates*, and the *Guide Notes on the Perspectives* are provided in hard copy and electronically. Teachers in this study were concerned that they did not always receive the information and that the information in the *Examiners' Reports* was insufficient for their needs.

Schools provide the immediate community of practice for the teachers. Senior management teams were reported to exhibit varying levels of support for senior social studies within an environment where subject departments are competing for students and resources. Teachers in the study considered that senior social studies was accorded the same or lower status than other senior school subjects, even within the social sciences.

The voluntary professional community for social studies is ANZFSSA. Some efforts have been made nationally and regionally to promote senior social studies over the years. Teachers in the study, however, generally did not report the association to be a major source of support or resources (Table 20).

The most significant conflicting responses in chapter six are summarised within the context of each of the professional communities of practice. Question 3.2 of the postal survey referring to the on-going professional support provided by the MoE elicited a large number of strong, conflicting responses. These ranged from teachers considering that they were well supported to those who were vehement that they had been poorly supported. Similarly, the inability of teachers to access resources developed by Beacon Schools' teachers created a 'them and us' situation, with some teachers considering themselves 'in the loop' and others very much 'outside the loop'. Diametrically opposing attitudes to the anonymous internal moderation system expressed by RES27 and INF2 exemplified conflicting responses to this important role of the NZQA. Conflicting responses were also reported regarding the effective dissemination of information by the NZQA. Teachers reported differing responses to the levels of support provided by their senior management teams and by ANZFSSA, the latter being viewed as more effective in some regions than others.

Overall, the relatively low levels of effective and consistent support by the four professional communities of practice, despite their good intentions, exacerbated

the tensions of practice for the contemporary pioneers. These tensions have been reflected in their conflicting responses to the support provided.

The thesis now synthesises the literature and data from the previous four chapters in the discussion chapter (chapter seven).

CHAPTER SEVEN: DISCUSSION

SENIOR SOCIAL STUDIES AT THE CROSSROADS?

7.1 INTRODUCTION TO CHAPTER SEVEN

That 'social studies is at the crossroads' is another familiar refrain. It has been used to describe the status of social studies in the early 1980s (Buckland, 1982) and again a decade later (McGee & McGee, 1992). In the first instance, the author was reflecting on the future in light of the recently published *Syllabus Guidelines* (DoE, 1977b) whereas the latter instance preceded the 1990s *SSiNZC* (MoE, 1994, 1996, 1997) developments. In this study the assessment and qualifications policy, the NCEA, had been implemented for five years but its success was also at a critical juncture.

Senior social studies, introduced for the NCEA since 2002, appears once again to have got off to a 'stuttering start' (Herbert, interviewed by Openshaw, 1991). The teacher narratives have told two main stories – tales of ease and struggle, of idealism and pragmatism. On the one hand, the lead educators and to a lesser extent the focus group teachers expressed a sense of hope, excitement and empowerment about the implementation of senior social studies. On the other hand, I heard from classroom teachers various stories of difficulty, frustration and powerlessness. Responses to the postal survey confirmed these conflicting responses. This is not surprising. In relation to a survey of English teachers prior to the implementation of the NCEA, Terry Locke (2001) noted:

... a view that ... teachers can be easily compartmentalised is difficult to sustain. If anything this research reveals a profession characterised by a range of positions, at times inconsistent, at times compliant, sometimes resistant, often unheard and invariably eloquent when given half a chance of having their voices listened to. (p. 21)

Similarly, contemporary senior social studies pioneers welcomed the opportunity to be listened to, but did not all speak 'with one voice'.

This chapter synthesises the literature and data presented in chapters three to six, drawing in particular on Bernstein's (1971, 1996) classification and framing of knowledge and Bourdieu's (1977, 1990) social-field theory. The chapter addresses each of the four research questions in turn. The choice of each question and its subheadings is reiterated, the main literature and policy documents briefly considered and the most significant findings provided. For each of the four research questions, links are made to the existing literature and the contributions of this study to new knowledge are identified.

The discussion now turns to the first research question.

7.2 PERSONAL AND PROFESSIONAL DISPOSITIONS OF CONTEMPORARY PIONEERS

The first question was addressed in chapter three:

How have the differing personal and professional dispositions of teachers impacted on the implementation of senior social studies?

As explained in chapter two, section 2.3, this question emerged as a new focus during the evolution of the study. In fact, the very first question of the pilot study teacher, INF1, focused on her motivation for implementing senior social studies (Appendix D). As the study progressed, it became very apparent that teachers' motivations for opting into this new subject in the senior secondary school varied considerably. This research question therefore focused on the more subjective concerns of the personal dispositions of teachers, including their 'missionary zeal', sense of self-efficacy and self-definition. Their professional dispositions towards their obligations as teachers to the diverse learners in their classrooms and towards making links between junior and senior social studies, particularly in terms of curriculum fidelity, were considered.

The notion of habitus (Bourdieu, 1977, 1990) was germane to this research question. The subjective 'feel for the game' (McNay, 1999) underpinned the

dispositions or inclinations of teachers towards adopting educational innovation and change. The courage and initiative of the early social studies pioneers such as Phoebe Meikle (Meikle, 1959a, 1994; Openshaw, 1991) provided a background against which the motivations and responses of the contemporary pioneers were considered. The self-efficacy of teachers was either enhanced or diminished by a number of factors, including the lack of professional support and sense of isolation (Fastier, 2007; Hargreaves, 1994). The educational capital of the contemporary pioneers exhibited a strong sense of collective identity by secondary teachers in general (Couling, 2005), as well as a strong sense of loyalty to one's university or parent discipline which was generally history or geography (Keen, 1979). Teachers could, however, be resocialised into another subject discipline (Bernstein, 1971) and frequently have been. Concerns about teacher capability in social studies in former years (Meikle, 1994; Northover, 1980), and more recently (Cubitt, 2005; ERO, 2001, 2006; McGee, 2002), were addressed. Further, the contested notions of professionalism (Beare, 1992; Brennan, 1993; Codd, 1997; Vossler, 2006) were considered in relation to outcomes-based education systems.

The most significant finding of chapter three was that almost half of the teachers opted to offer level one social studies achievement standards to year 10 students, mostly for extension purposes (Table 6; Appendix H). The same proportion offered level one social studies to year 11 students. Further, many of the teachers offering level one to their year 10 students were only offering the internally-assessed standards. This reflected a very 'pragmatic' motivation, as opposed to the more 'idealistic' motivation of other advocates (Figure 2) and reflected historic practices.

The second year of the implementation of the NCEA, 2003, witnessed the largest proportion of schools (31%) introducing level one social studies. Since 2003, the proportions declined each year until 2006 (Table 7). Only a small percentage of schools (20%) committed to offering a full course of all three levels over the

succeeding five years (Table 8; Appendix H). These teachers could be termed idealists. Teachers expressed the pragmatic desire to attract and retain students within social science departments. The perception of social studies at level one as a 'feeder' subject into the more traditional social science subjects evoked a sense of déjà vu in relation to the treatment of social studies by many teachers in the School Certificate era.

The role of senior social studies teachers' academic specialty or parent discipline was a major focus within this research question. The parent disciplines of senior social studies teachers represented in the first three phases of the study were mostly geography, with a smaller percentage of history and almost no economics (Table 9). Only 21% of the respondents defined themselves as social studies specialists, expressing their commitment to the new subject in the senior school.

Teachers expressed a variety of responses to questions pertaining to their sense of self-efficacy. Their self-efficacy was likely to be enhanced when they were offered leadership roles in the community and therefore they were able to support their peers. On the other hand, self-efficacy was reportedly diminished by negative experiences of the moderation process of the internals, of confusion about the marking of the externals, of changing parameters of the 'game' and a lack of clear definition of terms used.

The professional dispositions of teachers were considered in the light of two aspects of their practice. Their responsibility to meet the learning needs of all the students in their classes was reinforced by two of the lead educators. In stark contrast, classroom teachers and other lead educators expressed reasons for the difficulties some students experienced in achieving success in senior social studies, especially the open-ended external examinations. The reasons given related to some students' low literacy levels, their inability to think critically, their lack of complexity of thought patterns and their need to develop a wider world view.

The second aspect of teachers' practice, that is the link between the teaching of senior and junior social studies, was related to the concept of curriculum fidelity. Over two-thirds of the respondents to the postal survey considered that their teaching of year 9 and 10 classes had improved as the result of implementing NCEA social studies as did the two lead educators who were also classroom teachers. This improvement was notably in light of using the *SSiNZC* document more effectively, particularly the perspectives, concepts and processes.

The teachers provided evidence that they made a large number of professional judgements in relation to their practice on a daily and longer term basis. Although constrained by the objective parameters of the curriculum and assessment requirements, they expressed their creativity in their classrooms (e.g., INF1, INF2, PAR2, RES13b; RES16) and worked hard to meet the learning needs of their students. The reflections of the respondents revealed that they were not merely 'trained technicians' implementing an objective assessment and qualifications system based on their curriculum, but were working in a subjective but professional manner to mediate between a policy initiative and the practice as it was enacted in their daily work lives. There was a strong sense from the literature and data that this can only occur, however, if specialist social studies teachers are employed and that the stereotype 'anyone can teach social studies' is finally dispelled.

The current study has contributed to the historical literature in a number of ways. The historical literature has provided the social studies community with a rich source of information about the strong personalities who led curriculum developments in previous decades. These early pioneers have been named, have provided oral histories (Openshaw, 1991), have written in local educational journals (e.g., Buckland, 1982; Gorrie, 1963; Meikle, 1959a, 1960; Whitehead, 1974) or an autobiography (e.g., Meikle, 1994). The current study has not been able to name the contemporary pioneers for ethical reasons, but it has updated knowledge on the subjective dispositions of teachers who enact change,

especially in the social sciences. While parallels have been drawn with the personal and professional dispositions of the early pioneers, the study has provided new insights into the motivations of lead educators and classroom teachers in extending an existing compulsory subject in years 9 and 10 into a subject of choice within a new assessment and qualifications system in the senior secondary school. This is of particular relevance to the links between junior and senior social studies. The study has provided data to support contentions about collective identity and the role of parent disciplines in secondary schools (Couling, 2005), especially in relation to the social sciences. Further, the study has reinforced the need to address issues of teacher capability (Cubitt, 2005; ERO 2001, 2005; McGee, 2002) by emphasising the important role of specialist social studies teachers.

The discussion now turns to the second research question.

7.3 SOCIAL STUDIES CURRICULUM DEVELOPMENTS OVER TIME

The second question was addressed in chapter four:

How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?

This question condensed two of the original questions during the evolving nature of the research as explained in chapter two, section 2.3. Teachers' responses to the fundamental nature of social studies as an integration of the traditional social science subjects, which has been poorly understood and strategised, was addressed over four discrete periods of curriculum developments. This was followed by a discussion of the sibling rivalries of the traditional social science subjects economics, history and geography as well as sociology, which have underpinned their territorial defensiveness. The territorial tensions have necessitated social studies' advocates to struggle to carve out a unique position within the social sciences. The advantages (Vignette 2) and disadvantages of social studies as a conceptually-based, weakly prescribed curriculum were

provided. Finally the four traditions which have legitimated social studies were addressed.

The irregular, 'ad hoc and piecemeal' (Openshaw, 2004) social studies curriculum developments over its sixty year history have been well documented (e.g., Barr, 1998; Buckland, 1982; Evison, 1963; Meikle, 1959a, 1960; Northover, 1980; Openshaw & Archer, 1992), especially the highly contested developments of the 1990s (e.g., Aitken, 2005a, 2005b; Beals, 2001; Hunter & Keown, 2001; Mutch, 1998; Openshaw, 1996/97; Sullivan, 2001; Wendt Samu, 1998). The relationship between history and social studies teachers and teaching in particular has proven intransigent at times (e.g., Peachey, 2005; Sheehan, 2007, 2008; White, 2004) whereas there appears to have been more common ground between geography and social studies (e.g., Bailey, 1996; Baldwin & Papprell, 2006; Gorrie, 1963; Keown & McPherson, 2004; Stirling, 1996). Potential links between sociology and social studies were suggested (Childs, 2004; Lewis, 1980; Low-Beer, 1986). A level of suspicion between economics and social studies was indicated (Aitken, 2005b). The three traditions of 'The Social Studies' in the USA (Barr et al, 1977) plus a fourth from Australia have been utilised to justify the role, nature and purpose of social studies in New Zealand (Barr et al, 1997). In particular, the citizenship education goal of the subject has been highlighted.

The most significant finding of the current study was that the periods of curriculum developments have tended to reinforce the divisions and potential conflict between those teachers willing to adopt the integrated subject social studies, those who have wished to retain the status quo and those who have steadfastly refused to adopt the innovation. This is not surprising as studies show that that in any educational innovation and change, teachers are likely to adapt in a range of ways (Brain, Reid & Comerford Boyes, 2006).

The heuristic provided by Brain et al (2006) was used to summarise the conflicting responses of teachers to educational change as they mediate between

educational policy and practice. The device allowed for five categories of response but I only used three of the categories. In past social studies developments there has tended to be a 'normal curve of distribution' of teachers' responses (Northover, 1980) from enthusiastic acceptance to passive resistance to outright rejection. The range of responses to various periods of curriculum development (and the introduction of senior social studies for the NCEA) by teachers in the study summarised in Table 10 reinforced this trend.

The more weakly prescribed nature of social studies, with its permeable boundaries (Bernstein, 1971) and open relationship to other school subjects has been seen in the past as a disadvantage for the subject. The lack of a strong sense of the nature, purpose and a distinctive epistemology for social studies has traditionally seen the subject accorded a lower status compared to its more strongly classified siblings, especially history and geography. The search for a greater level of distinctiveness within the social sciences and for academic credibility as a whole has resulted in the community making some progress over the five year study period to establish a unifying theme of contemporary social issues, although teachers' reported contexts for studying AS90218 were quite disparate (Table 11). Overall, a focus on contemporary social justice issues, nationally and globally, appeared to be the major integrating theme which emerged from the data.

The values exploration process, which formed the initial focus of my study, was related to the personal development tradition of social studies. Strategies for conducting values inquiry, leading to social participation, were provided in Table 12. Teachers reported some interest in the social activism role of their subject and a number offered their students the opportunity to engage in relatively 'safe', manageable forms of social action (Table 13; Vignettes 3 and 4). They expressed a strong commitment to the citizenship education goals which could be traced through the four traditions which legitimate the subject. Teachers expressed a desire for students to engage in critical thinking within social studies contexts

and to take a wider view of global issues, thus reinforcing the social justice agenda of the subject. These findings align with the directions taken by the NZC (MoE, 2007) to be mandated from 2010.

The current study has contributed to both the historical and sociological literature. It has supported historical literature on the contested curriculum developments in New Zealand over six decades. In particular, it has highlighted the importance of teachers understanding and being able to strategise the integrated nature of social studies (Evison, 1963; McGee, 1998). The lack of appreciation of the integrated nature of the subject has underpinned the territorial disputes between the social science subjects over the sixty years. The study has affirmed the citizenship goals of social studies legitimated by the four traditions (Barr et al, 1977; Barr et al, 1997), focusing particularly on the social activism role of teachers and social action undertaken by students. Further, the values exploration process has been linked to the personal development tradition as well as being an important component of citizenship education goals.

The study has provided a practical illustration of Bernstein's sociological conception of the classification and framing of knowledge which in turn has explained the difficulties social studies has experienced in establishing a unique identity within the social sciences. Similarly, the study has provided a practical example of Brain and colleagues' typology of teachers' adaptations to new policy initiatives. The study has updated knowledge to the varying responses social science teachers have demonstrated to social studies curriculum innovation and change as initially introduced by Northover (1980).

The focus now turns to the third research question.

7.4 STANDARDS-BASED ASSESSMENT DEVELOPMENTS OVER TIME

The third question addresses assessment which was always intended to be pivotal to the study and which was the focus of chapter five. The broadening

research context caused a change from an initially narrow focus on the assessment of the values exploration process to a consideration of the wider impact of the introduction of standards-based assessment on senior social studies:

How has the introduction of standards-based assessment enabled and constrained the implementation of senior social studies?

This question was unpacked in five ways. Firstly, an historical overview of the rationale and staged implementation of standards-based assessment in New Zealand, especially in the social sciences, was outlined. Secondly, the opportunities provided to the social studies community with the inclusion of social studies as an examinable subject for the NCEA from 2002 were identified and examined in light of the literature and data. Thirdly, a number of constraints to the successful implementation of social studies for the NCEA which emerged during the study were discussed. Fourthly, links were made between the idealists' and pragmatists' possible educational ideologies and the qualifications and assessment discourses and decisions (Dobric, 2005) they were likely to adhere to. Finally, statistics highlighting the 'market shares' of social studies achievement standards within the social sciences and the role of social science unit standards within the NCEA were provided and commented upon.

Literature and policy documents pertaining to the transition from norm-referenced to standards-based assessment in New Zealand provided a background to the data. Of note was the long-standing disenchantment of the norm-referenced system by a number of teachers (Alison, 2006b; Dobric, 2005; Openshaw, 2005; Strachan, 2001) yet when the new system was introduced teachers displayed a high level of 'professional amnesia' (Alison, 2006c). The social sciences community experienced initial moves towards standards-based assessment with the implementation of achievement-based assessment in geography in 1989 and in forms 3 and 4 social studies with the *Handbook* (MoE, 1991). In addition, unit standards were introduced in geography from 1995, and were written for social studies but not implemented (Hunter & Keown, 2001).

Professor Paul Black (2001) signalled potential benefits and pitfalls of the proposed system which was based on international experience (Dobric, 2005; Rawlins et al, 2005). Commentators charted the course of the inception and birth of the highly contested NCEA (Dobric, 2005; Elley et al, 2004; Lee & Lee, 2000; Strachan, 2001) in general terms. Very little subject-specific material on the implementation experiences and effects of the NCEA on the social sciences was located other than one study of geography (Hipkins et al, 2006a).

The introduction of the NCEA provided opportunities for social studies to achieve academic credibility in senior secondary schools. Historically the lack of examination status reinforced social studies' perceived low status (Austin, 1985; Meikle, 1960; Whitehead, 1974; Openshaw, 2004, 2005). One opportunity was the opening up of subject choices for students with the flexible educational pathways made possible by the NCEA, sometimes called 'course innovation' (Hipkins & Vaughan, 2006b; Pilcher, 2006) or 'mixed courses'. Mixed courses align with new conceptions of knowledge (Gilbert, 2005) and an emphasis on school-based curricula (Baldwin, 2007; Bolstad, 2006) which are consistent with Bernstein's (1996) notion of 'regionalisation'. The parity of esteem accorded to unit and achievement standards within the NCEA as it was originally conceptualised (Alison, 2005; Black, 2001) and the ability to assess values (sometimes termed the affective domain) (Hill, 1994; Wiggins & McTigue, 1998) provided other opportunities for social studies (Keown, 2003; Taylor & Atkins, 2005).

In contrast, a number of constraints on social studies teachers within the new assessment and qualifications system were identified. A major constraint was expressed by the adage that 'assessment drives our programmes' (Hall, 1999; Hipkins, 2007a). This concern does not just relate to social studies. A socially critical perspective pointed out the impact of outcomes-based initiatives in education upon teachers' professionalism (Alison, 2007; Codd, 1997; Gewirtz, 2003; Lee, 2003; Neyland, 2005; Vossler, 2006). The constraints or parameters of the assessment and qualifications system, the NCEA, frame teachers' work

(Bernstein, 1971) in that teachers are constantly negotiating limits placed on them by the system. The regulatory codes of the centrally mandated NCEA qualifications system impact on teachers' instructional codes in the classroom, that is, what and how they teach.

The world views and educational ideologies held by teachers who implemented senior social studies from 2002 to 2006 may have impacted on their decisions about qualifications and assessment discourses (Dobric, 2005). Dobric's heuristic was utilised to illustrate how the motivations of the idealists and pragmatists reflected larger educational, qualifications and assessment ideologies.

The most significant finding of the current study was the extent to which social studies achievement standards, especially the internals at level one, were contributing to course innovation. Twelve out of 38 schools (31.6%) were either combining unit and achievement standards from various social science subjects (including sociology and legal studies unit standards) or achievement standards from other subjects, not just social sciences (section 5.3.2). This was higher than the 20% of schools reporting course innovation in the social sciences in a national survey in 2006 (Hipkins, 2007a). Teachers expressed a higher level of ownership over and confidence in the internally-assessed achievement standards compared with the externally-assessed achievement standards. There was mixed reaction to the proposition that values can be effectively assessed and to the adage that assessment drives programmes. While 39% agreed with the latter adage, compared with 80% in the national survey in 2006 (Hipkins, 2007a), teachers expressed their professional responsibility to their students in an environment of high stakes assessment.

The statistics provided in Tables 14 to 18 revealed that social studies' share within participation rates of social sciences achievement and unit standards was very small during the period studied (2002 to 2006). For the externals, the share of level one entries was between 1% and 2%, except in 2003 when it reached a

peak of 2.1% (Table 14). The decline since 2003 could be explained by teachers' strong concerns about the setting and marking of the externals. On the other hand, the share for the level one internals grew to almost 8% of the total by the end of the data gathering period (Table 15), indicating the strong uptake of these by students being accelerated in year 10 and in the internals being included in mixed courses. For levels two and three social studies, the numbers of students participating in both the internals and externals continued to grow although overall numbers were still relatively small (Table 16). A significant number of unit standards were undertaken in the social sciences (Table 17), with legal studies at level two being especially popular (Table 18). Current developments (postscript, section 8.7.2) may well impact on these statistics, annual updating of which would be interesting for comparative purposes.

The most significant contribution of the current study to new knowledge has been to the NCEA literature. While there have been a number of research reports published about the implementation of the NCEA, starting from 2005, many of these have not been subject-specific. For the social sciences, geography was included in the *Shifting Balances* series (Hipkins et al, 2006a). There have been no other studies of the implementation of senior social studies for the NCEA. This study therefore makes a major contribution to the subject-specific knowledge about the implementation of the new assessment and qualifications system. In addition, it showcases the experiences of one of the new subjects included in the senior secondary school curriculum since 2002.

The study has identified opportunities for social studies, including adding to the literature on course innovation and the ability to assess values (the affective domain). The study has also identified constraints on social studies, adding to the literature on the strong role played by assessment 'driving' the curriculum. The study has also provided a further practical illustration of Dobric's typology of qualifications and assessment discourses. Whereas Dobric considered policy

actors' responses to the NCEA before its implementation, the current study considered teachers' responses after the initial five years of implementation.

The discussion now turns to the fourth and final research question.

7.5 PROFESSIONAL COMMUNITIES OF PRACTICE SUPPORTING SENIOR SOCIAL STUDIES

The fourth research question related to the four governmental and voluntary groups which are charged with supporting social studies teaching and learning in New Zealand secondary schools. This was the focus of chapter six. This question was slightly changed from the original (chapter two, section 2.3) to read:

To what extent have the professional communities of practice supported teachers to implement senior social studies?

The changed wording altered the focus from teachers creating new programmes in the original research question, to the role of the official professional communities of practice play in supporting the contemporary pioneers in implementing senior social studies in the revised research question.

Four professional communities of practice were identified early in the study - (i) the MoE focusing especially on curriculum development and professional support; (ii) the NZQA focusing on the administration of the assessment and qualifications systems; (iii) senior management teams and social science departments in secondary schools; and (iv) the mostly voluntary subject association ANZFSSA.

'Communities of practice' was a term introduced in the 1990s (Wenger, 1998) which is utilised in this study to refer to groups of people who support each other in their professional practice. Throughout the various phases of social studies curriculum developments official groups have been set up to initiate change and to support teachers through the DoE and later the MoE (Vossler, 2002). These have included groups such as the National Social Studies, History and Geography Curriculum Committees during the 1970s (Chalmers, 2005).

These formal groups have traditionally had a pivotal role in supporting teachers implement educational change, frequently termed 'professional development'. In addition, teachers develop their own informal support networks which can also be regarded as communities of practice.

The role of teacher professional development has been to persuade teachers to adopt new policies (O'Neill, 2005). The top-down and increasingly contractual nature of professional development has been a concern (Elley, 2004; Vossler, 2002). In effect, officials of these communities of practice have also been players on the social-field of senior social studies, with specific roles. Most of their roles have been to do with providing and enforcing the parameters within which the implementation of senior social studies could proceed, that is providing the 'rules for the game' in Bourdieu's terms. The state agencies, especially the MoE, have provided considerable resourcing to support the social-field of senior social studies but the nature and outcomes of that support have proved problematic for many of the teachers in the study.

The most significant finding of chapter six was the poor outcome for classroom teachers of the number of initiatives set up to assist them in their daily work lives. For example, almost 40% of the respondents to the postal survey (phase three) were utilising online units from the *SSoL* website on TKI even though these units had not been updated since the end of 2003 (the online assessment exemplars on the NCEA site on TKI which related to some of these units had been updated). Further, the unit plans and assessment activities developed during the three years of the Beacon Schools' Project had not been made available to the wider community which had been the intended outcome of this MoE initiative. The failure to publish the Beacons' resources during the study period created a 'them and us' situation, with some teachers considered 'in the loop' and others 'out of the loop' (focus group teachers, phase two). Those 'in the loop' of the Beacon Schools' Project certainly benefitted professionally (e.g., INF1 & 2; RES16).

The role of the NZQA received some criticism. The dissemination of information was deemed inadequate by the focus group teachers (phase two) and some of the lead educators (phase one). The amount of information in the annual *Examiners' Reports* from the NZQA, except for the 2003 *Report*, was deemed by these informants and participants to be minimalist and to provide inadequate guidance. The dissemination of other resources, especially the joint venture MoE and NZQA *Guide Notes on the Perspectives*, was not as widespread as could be expected. The moderation process of the internally-assessed achievement standards was criticised by a number of teachers who considered that the process diminished their self-efficacy and in some cases caused them to discontinue offering senior social studies. Further, the perceived irregularities in marking of the externally-assessed achievement standards and lack of clear guidance forced a number of teachers to reconsider offering the 'capricious' externals to their students, especially those studying the subject at year 10 for extension purposes.

Participants in the research indicated a range of levels of support for their subject from their senior management teams in the competitive environment of the senior secondary school. Approximately two-thirds (63%) of the respondents to the postal survey (phase three) claimed that social studies enjoyed the same status as other social science subjects, while a smaller proportion (57%) claimed that their subject had the same status as other NCEA subjects. The others perceived social studies to have a lower status. In one school (RES28a) a change in the senior management team resulted in a quite different perception of senior social studies, with the respondents being fearful of the ability to continue to offer it. Within social science departments subjects are competing for scarce resources, including student numbers. This competition was evident in conversations with the focus group (especially PAR2 & 3) as well as in teachers' responses to question 7 in the postal survey as to their intention over the next five years (Table 8; Appendix H).

The subject association failed to rate as a significant professional community of practice for participants in the current study. Very few respondents noted ANZFSSA as a source of support, and for those who did the Waikato Association was the only one mentioned specifically. Not one of the respondents referred to the publication of ANZFSSA, the *New Zealand Journal of Social Studies*, as a source of information. For a number of reasons the subject association has therefore been unable to provide the level of support required for the neophyte senior social studies teachers.

The current study has contributed to the historical literature on the role of professional communities of practice which support teachers in their work. It has evaluated the support of the MoE, the NZQA, schools and the subject association ANZFSSA to teachers implementing social studies for the NCEA. Once again, social studies has provided a case study of a new subject within the examinable curriculum of the senior secondary school. While there is historical literature relating to the professional support provided especially by the DoE and more recently the MoE, there has been very little evaluating the role of subject associations. This study contributes to the literature on subject associations. Further, most official reports on social studies have been confined to the primary school, especially years 4 and 8. This study makes a significant contribution to new knowledge about secondary school social studies, especially in the senior school.

7.6 TYING THE THREADS OF THE THEORETICAL FRAMEWORK TOGETHER

The study was embedded within social-field theory (Bourdieu, 1977, 1990), the social-field comprising senior social studies as a new subject for the NCEA. Parameters for the game were established by the MoE and NZQA, the game being regarded as an objective entity within which subjective relationships operate. In this study subjective relationships have been seen to operate between

classroom teachers, the lead educators, officials from the MoE and NZQA, members of senior management teams in schools and members of ANZFSSA. Further, the habitus of teachers (both classroom teachers and lead educators) which disposed them to adopt educational innovations, such as their level of motivation and parent discipline, was regarded as important in the study.

The establishment of the social-field of senior social studies represented a significant opportunity for the subject to gain credibility and academic status within senior secondary schools. Social studies commentators, who have critiqued social studies against the benchmarks set by Layton (1972) for the development of a secondary school subject, have not agreed on which of the three stages social studies has reached in New Zealand. The implementation of social studies for the NCEA did, however, provide the opportunity for the subject to reach stage three (Taylor, 2005) although the attainment of this final stage is still debatable.

The classroom teachers, as key players in the social-field, responded in a range of ways to the adoption of the new subject for the NCEA. Those who adopted the subject at all three levels were termed 'idealists', whilst those who adopted it just at level one (frequently for extension purposes at year 10) or as a component of mixed courses were termed 'pragmatists'. It must be noted that a significant number of teachers and schools opted not to implement the subject. This range of responses mirrored trends in previous periods of social studies curriculum developments in New Zealand. The responses were categorised with reference to Brain, Reid and Comerford Boyes' (2006) typology of adaptation to educational change, acknowledging that teachers are the mediators between educational policy and practice.

The responses of the key players in the social-field, especially the lead educators and classroom teachers, were based on their reflections about their practice. These reflections ranged from technical through to critical interests of reflection

(Louden, 1991). For the pragmatists, concerns of a technical nature as reflected in Vignette One, strongly influenced their daily work lives. Problematic interests such as concerns about the anonymous moderation system also affected teachers' daily work lives and decision making processes. For those teachers who could reflect critically about their practice, empowerment resulted (for example, for INF1 and INF2).

Teachers' responses were also influenced by the world views or macro ideologies about assessment and qualifications held by them as key players in the social-field. The 'idealists', for example, were considered to have adopted a humanistic macro ideology, having a concern for empowerment and growth of their students thereby contributing to Dobric's 'fulfilment' qualifications and assessment discourse. In contrast, the 'pragmatists' (especially those who were offering level one achievement standards to their more able year 10 students for extension purposes, could be considered to adhere to the assessment and qualifications discourse of 'excellence'. Further, the pragmatists offering mixed courses could be considered to subscribe to Dobric's 'usefulness' discourse.

The five seemingly unconnected heuristic devices adopted to provide a theoretical framework may thus be seen to converge in order to make sense of the data gathered and processed in the study. Within this structure, the conflicting responses of the contemporary pioneers (both the idealists and the pragmatists) reported in chapters three to six have been highlighted. These reflect the central proposition of the thesis 'that teachers have experienced different and, at times, conflicting responses to the implementation of senior social studies for the NCEA, especially at level one.'

Chapter seven is now summarised.

7.7 CHAPTER SUMMARY

Chapter seven has discussed the findings of the current study in the light of the existing literature. Each of the four research questions has been addressed in turn. In each case, the research question and choice of sub-headings has been reiterated, the main literature and policy documents summarised, the most significant findings discussed and the contribution to knowledge in the fields identified.

The first research question was *How have the differing personal and professional dispositions of teachers impacted on the implementation of senior social studies?* The responses to this question adopted a strongly historical approach by comparing the motivations of the contemporary pioneers with the early pioneers. The 'missionary zeal' of the teachers implementing senior social studies in the current study reflected historical tensions between teachers with differing subject loyalties and differing levels of self-efficacy. As a result, some of the teachers were categorised as 'idealists' and others as 'pragmatists'. The data on professional dispositions was restricted to teachers' responsibilities to cater for the needs of diverse learners and the impact on junior social studies programmes of implementing senior social studies. The useful contribution to knowledge has been in the field of social studies, especially the motivations of teachers in the non-compulsory sector of secondary schools and related issues of teacher capability.

The second research question was *How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?* The responses to this question adopted both an historical and sociological approach. Teachers' responses were provided in relation to the four phases of curriculum developments in New Zealand social studies; to its weakly classified, conceptually based, non-prescribed nature; to the on-going relationship with its component subjects; and to the four traditions which legitimate the subject. The useful contribution to the literature was to provide a case study for Bernstein's

(1971, 1996) and Brain and colleagues' (2006) categorisations. In addition, the study has updated knowledge on teachers' responses to social studies curriculum developments especially in the senior secondary school.

The third research question was *How has the introduction of standards-based assessment enabled and constrained the implementation of senior social studies?* The responses to this question utilised both an historical approach to the evolution of standards-based assessment in relation to the social sciences and a sociological approach in terms of educational ideologies. Statistical data provided a wider context for the status of social studies within the social sciences for the NCEA over the initial implementation period studied. The study made a valuable contribution to the subject-specific knowledge about the controversial assessment and qualifications system introduced in New Zealand senior secondary schools from 2002.

The fourth research question was *To what extent have the professional communities of practice supported teachers to implement senior social studies?* The responses to this question evaluated the effectiveness of the four institutions (the MoE, the NZQA, schools and ANZFSSA) which should have been supporting teachers implementing senior social studies. The study has made a useful contribution to the knowledge about the role of subject associations and about social studies' status as a subject within the overcrowded senior secondary school curriculum.

Finally, key elements of the five heuristic devices utilised to make sense of the findings of the study were linked within the major theoretical construct of social-field theory. The discussion in chapter seven has set the scene for the conclusion of the thesis.

CHAPTER EIGHT: CONCLUSION

THE WAY FORWARD

8.1 INTRODUCTION TO CHAPTER EIGHT

The story of the first five years of senior social studies does not have a particularly happy or decisive ending. Evidence of good practice has emerged from the study, especially by the idealists, as well as some progress made towards developing an internal logic for the subject. Numbers in the internally-assessed achievement standards at level one and in all standards at levels two and three have grown but are still relatively low. The community, as stated by INF7 at the commencement of this thesis, still does not appear to have a clear sense of direction and unity.

The purpose of this chapter is to conclude the thesis. I begin with a reprise of the nature and purpose of the study, especially the aims, theoretical frame, research questions and design. The reprise includes a summary of the main findings. Next an evaluation of the progress of the implementation of senior social studies for the NCEA during the period 2002 to 2006, especially in terms of Layton's (1972) model, is provided. Subsequently five suggestions for further research, three limitations of the study and two contributions to the field are identified. The chapter ends with a postscript which identifies relevant developments in social studies since the end of the data gathering period, 2006, and the writer's final thoughts.

8.2 REPRISE OF THE NATURE, PURPOSE AND MAIN FINDINGS OF THE STUDY

This study set out to investigate the implementation of social studies as a new subject for the NCEA which was introduced as the national assessment and qualifications system for New Zealand secondary school students from 2002. My initial rather narrow focus on the values exploration process at level one

(AS90218 *Examine differing values positions*) was broadened during the research process. The final focus of the study became an evaluation of the first five years of implementation of social studies for the NCEA, principally but not exclusively at level one.

The thesis has taken a broad socio-historical approach. The historical focus of the literature related to both the development of social studies in New Zealand over sixty years and to the responses of the early pioneers of the subject. The oral histories of Openshaw (1991) were particularly helpful in providing a background to modern day developments. Links to developments in The Social Studies in the USA over time have also been made. The sociology of education has also been a focus, particularly in terms of how knowledge is packaged into school subjects, the development and status of subjects and territorial disputes between subjects. The work of Bernstein (1971, 1996) regarding the classification and framing of knowledge has been particularly useful in linking historical trends in social studies since its inception, to the experience of contemporary educators under the NCEA.

The study was located within the interpretivist epistemological paradigm. I sought to interpret lead educators' and classroom teachers' responses to their experiences of implementing the NCEA in social studies over the five year period. My philosophical position oscillated during the study period, influenced by my positivist background in geography in the 1970s. Elements of critical social science have also been incorporated in the study.

Four phases of data gathering were undertaken. In the first phase, semi-structured interviews were conducted with seven lead educators, people who held national roles in the implementation of the subject for NCEA and/or had expertise in values education. These interviews were termed elite interviews and began with a series of in-depth pilot interviews of one classroom teacher who

also held national roles. The subsequent six elite interviews were less intensive and focused on aspects of the four original research questions.

The second phase of data gathering involved four teachers of level one social studies who were engaged in four full days of discussion about their experiences. The intention was to engage in action research, but on realising that this method was 'failing', I reflected and recuperated with a focus group approach. The third phase, conducted towards the end of the data gathering period, was a postal survey of 67 schools offering level one social studies, specifically AS90218, in 2005 and/or 2006. The data from this survey more broadly contextualised the material gathered during the previous two phases. In all, 45 teachers responded to the postal survey representing 38 schools of which three schools provided incomplete or nil responses. The final phase included statistics from NZQA on achievement and unit standards for the social sciences plus documents from ANZFSSA. Where appropriate, my voice and experience as a member of the social studies communities over four decades has been added and footnoted. Some personal comments from other key people in the social studies community have also been added.

The data were analysed using thematic qualitative analysis (Hayes, 1997, 2000; Morse 1994). I analysed the data manually, initially focusing on factors which enabled or constrained the implementation of senior social studies. These were then sorted under a number of themes and sub-themes (Table 2). The initial draft of the thesis utilised an enable/constrain binary to focus the two data chapters within the headings *personal, contextual and institutional* (Mutch, 2003) factors. After some reconsideration, the decision was made to write the thesis in a more 'storied' manner to more truly reflect the teachers' stories. This resulted in the literature and data being interwoven throughout four chapters – *personal* factors in chapter three, *contextual one* (curriculum) in chapter four, *contextual two* (assessment) in chapter five, and *institutional* in chapter six.

A number of heuristic devices were utilised to theorise the data. Bourdieu's (1977, 1990) theory of social-field has been used to portray the teachers' subjective responses to their experiences of implementing the new subject social studies within the objective boundaries of the new assessment and qualifications system, the NCEA. A precedent for using this theory to explain New Zealand social studies was set by Mutch (2006). Layton's (1972) three stage model of the progress of a subject towards maturity was also used throughout the thesis, because it has been used as a benchmark by social studies commentators in New Zealand to chart the progress of their subject (Barr, 2000; Openshaw & Archer, 1992; Taylor, 2005). The typology offered by Brain, Reid and Comerford Boyes (2006) to explain teachers' adaptations to educational change, especially in their roles of having to mediate between educational policy and practice, proved useful for summarising the responses of teachers in this study towards curriculum change in particular.

To a large extent, teachers were reflecting on their practice in the study, especially during phases one and two. It was therefore appropriate to consider Louden's (1992) 'interests of reflection', which ranged from technical, to personal, problematic and lastly critical. Finally, Dobric's (2005) typology of responses of the policy actors in the planning phase of the development of the NCEA was considered in relation to the initial five years of implementation of social studies for the NCEA. In all of the heuristic devices used, a common element was the differing responses of participants to educational change. The perceptions and concerns of classroom teachers who may accept or reject an educational innovation was a concern of this study. In the process of responding to change, the teachers would typically experience tension between their subjective experiences and the objective limits within which their daily work lives are played out. Together these five heuristics created the theoretical framework as outlined in chapter seven (section 7.6).

The main findings of the study are now summarised. The contemporary pioneers displayed a high level of enthusiasm for and idealism about senior social studies but also sounded notes of caution and pragmatism. Almost half of the schools were offering level one social studies to year 10 students (mostly for extension purposes) while the same proportion were offering them to year 11 students. A small proportion of schools (20%) were prepared to commit to implementing a full level one to three programme over the following five years from the postal survey in late 2006. Teachers tended to be defined by their parent disciplines, with only 20% being specialist social studies teachers. The teachers regarded social studies as a conceptually challenging subject and not a dumping ground for less able students. As such, teacher capability needed to be improved to dispel the myth that 'anyone can teach social studies'.

Teachers' responses to the integrated nature of social studies over four periods of curriculum developments revealed a normal curve of distribution. Progress towards an integrating theme of contemporary social issues emerged from the disparate group of topics studied at level one although strategies for integration have not been clearly outlined. On-going sibling rivalry between the component social science subjects has impacted on social studies over the decades, reinforcing its lowly status. Social studies has been legitimated by its four traditions, which are underpinned by citizenship education goals. Teachers were accepting of the citizenship education goals and encouraged their students to participate in some manageable social action.

The evolution of standards-based assessment in the New Zealand secondary school system, culminating in the introduction of the NCEA from 2002, has provided opportunities for social studies. The opportunities include the clarification of *SSiNZC* during the writing process; the ability of social studies to contribute to course innovation, especially the internals; and the ability to assess values. Some constraints to the efficacy of senior social studies were also identified. For example, constraints included the concern that assessment drives

teaching programmes, the problems associated with the externals and the potentially restrictive effect of templates on assessment activities. The statistical data revealed social studies' share of entries and results for achievement standards within the social sciences to be very low.

The four professional communities of practice which should have been supporting teachers of senior social studies have done so with mixed success. Two initiatives of the MoE, the online professional support provided on TKI by *SSoL* and the Beacon Schools' Project, have not been as effective for teachers as intended due to long publication delays. The dissemination of information from NZQA proved problematic in some respects. Schools, especially senior management teams, provided varying levels of support for senior social studies as a new subject within an already overcrowded and competitive senior school curriculum. The social studies subject association, ANZFSSA, was not as effective a support as could be expected, especially at the regional level.

The discussion now turns to an evaluation of the progress of social studies towards subject maturity.

8.3 SUBJECT MATURITY – A GOLDEN OPPORTUNITY MISSED?

The optimistic prediction that senior social studies would be “the defining factor” (Taylor, 2005, p. 169) in the subject reaching stage three of Layton's (1972) model was not borne out by the reality as evidenced in this study. A number of opportunities emerged, tempered by constraints. These suggest that a golden opportunity for the social studies community was lost during the initial five years of NCEA implementation.

In terms of Layton's (1972) three stage model or continuum towards the maturity of a school subject, a number of descriptors have been reinforced in this study. The “callow intruder” (p. 11) has staked a place in the timetable of an already overcrowded senior school curriculum in a number of schools (67 out of 385

secondary schools in 2005 and/or 2006). Teachers reported that students have appreciated the “pertinence and utility” (p. 11) of the subject with its focus on contemporary social justice issues on a local and global scale. The idealists certainly expressed “the missionary enthusiasm of pioneers” (p. 11) in taking the risk to implement this subject and they expressed their concerns about meeting the “needs and interests of their students” (p. 11) as a dominant concern. Thus Layton’s stage one descriptors were clearly addressed.

The current study also reinforced the relevance of the three descriptors for stage two of Layton’s model. “A tradition of scholarly work is emerging along with a corps of trained specialists from which trained teachers may be recruited” (p. 11) has occurred with the development of the lead educators and Beacons’ Schools teachers although concerns about teacher capability are still evident. The *Guide Notes* written to clarify the use of the perspectives, concepts and values achievement standards by the MoE indicate progress towards “the internal logic and discipline of the subject ... becoming increasingly influential on the selection and organisation of subject matter” (p. 11). This was also helped by the 2003 *Examiner’s Report* but further clarification is needed. The growth in the level one internals and level two and three internals and externals (Table 16), although still small, confirm the descriptor that “students are still attracted to the study but as much by its reputation and growing academic status as by its relevance to their own problems and concerns” (p. 11).

The academic status of senior social studies, especially the lack of a link to a university subject called social studies or to the list of subjects available for scholarship, has continued to be a major concern for the community. Openshaw and Archer (1992) added a third descriptor to Layton’s model, that of “acquisition of university status” (p. 56). This is as yet still an unattained goal for social studies advocates who appear to be in a double bind. At its best social studies could do better than the more traditional social science subjects, but by

not claiming a place in the university system its lowly status is reinforced. A closer link to sociology may arguably increase the subject's university status.

Whilst some New Zealand social studies commentators considered that social studies had achieved stage two (e.g., Barr, 2000; Openshaw & Archer, 1992), Taylor (2005) was rather more optimistic in claiming that the introduction of senior social studies would be the 'defining factor' in the progress into stage three. Certainly, Layton's (1972) requirement that "teachers now constitute a professional body with established rules and values" (p. 11) occurred two decades ago but the on-going effectiveness of ANZFSSA within the community is of concern. Another requirement for stage three, "selection of subject matter is determined in large measure by the judgements and practices of the specialist scholars who lead inquiries into the field" (p. 11), could be regarded as occurring, especially with the work of the Beacon Schools and on-going developments since this study period (postscript, section 8.7.1). The study has not fully addressed the more sombre note of Layton's stage three "students are initiated into a tradition, their attitudes approaching passivity and resignation, a prelude to disenchantment" (p. 11). There is clearly more work to be done in reinforcing the status and role of social studies within the senior secondary school curriculum.

A fundamental paradox in the nature of social studies has historically created tensions for teachers and has been at the heart of their conflicting responses to social studies curriculum developments over the decades. The paradox was historically located within the subject's low level of prescription which was regarded as both its greatest strength and its greatest weakness (Whitehead, 1974). In the present study, the paradox lies in having a weakly classified (Bernstein, 1971, 1996) subject overlaid by a strongly framed assessment system. Social studies stands in open relationship to other subjects and focuses on commonsense, community knowledge. These descriptions have contributed to its lowly status (Bernstein, 1971, 1996; Paechter, 2000). Within this subject teachers

have, however, traditionally enjoyed a good deal of freedom and professional autonomy when they regard social studies as an integrated subject and not as introductory history and geography.

The strongly framed assessment and qualifications system, the NCEA, has imposed a number of constraints or parameters on the weakly classified social studies curriculum. The objective parameters of the outcomes-based system on the social-field (Bourdieu, 1977, 1990) of senior social studies has created tensions for the subjective, frequently creative dispositions of the contemporary pioneers. This structure, reinforced by a compliance culture in a high stakes assessment and qualifications system, can be seen to conflict with teachers' sense of agency. Thus the dialectic between structure and agency (Harker et al, 1990) has resulted in tensions for teachers in the current study. A consequence of these tensions has been their conflicting responses.

Teachers' responses to the implementation of senior social studies were very mixed, ranging from the idealists who were more likely to be implementing a full course to the pragmatists who were more likely to be using level one achievement standards to extend able students and to maintain numbers within the social sciences. In general, the idealists were more likely to have been 'in the national loop' and have more sense of ownership, professional autonomy, greater self-efficacy and agency. They were likely to exhibit agency through their use of creative and innovative approaches (e.g., INF1, INF2, RES13a, RES16). In contrast, the pragmatists were more likely to feel burdened and at times overwhelmed by the constraints of the system. As a result they were likely to make practical decisions with regard to continuing to offer this subject, especially the externally-assessed components, therefore regaining some sense of professional control and justice for their students.

One would have expected that a learning community should have been created in the process of establishing the social-field of senior social studies. Some

progress was made towards this, with research on the understanding of the perspectives (Wood, 2006) leading to the hui in March 2006, jointly organised by the MoE and the NZQA. A large number of lead teachers were involved with this. Inklings of dissatisfaction came from a number of classroom teachers in this study, however, who felt 'out of the loop'. Concerns were also expressed in relation to the failure to share the Beacon Schools' resources and all wanted to be more widely involved in decision making. It was observed that the community as a whole seriously needs to be provided an opportunity to get together to clarify the parameters of the subject so that all "are on the same page" (INF7; RES20). It is to be hoped that a stronger national debate will urgently be entered into in order to build and sustain a learning community where all 'are on the same page'.

Resources, especially in terms of money, have been provided by the MoE to support the implementation of senior social studies. The nature of this support is of concern, however, especially the outcomes. The failure of the MoE to publish the work produced by the Beacon Schools' teachers as promised, the failure to update and produce the *SSoL* units on TKI during most of the study period, the lack of textbooks due to the small New Zealand market, are all serious issues which have necessitated individual teachers of senior social studies to be highly resourceful and energetic if they are to be successful in its implementation.

Why then can social studies still be considered to be a 'Cinderella' subject in the senior secondary school? Despite the missionary zeal of the idealists working very successfully in a small number of secondary schools, nationwide there was a disappointing uptake of senior social studies by the end of the study period (2006). The fine efforts of a few do not necessarily create a nationwide change as Meikle observed. If social studies is to remain a critical component of the *NZC* (Appendix M) and to retain its place as a senior subject in the following decades, then educators need to clearly understand the history and philosophy that underpin the subject. Historical tensions need to be resolved so that senior social

studies teachers can create programmes (and be supported to create programmes) that are seen to have a clear curriculum purpose, that portray a unique identity and that are considered to be academically robust (Atkins, 2008).

The study has highlighted a number of negatives. On a positive note, social studies' ability to contribute to mixed courses (especially the internals), its progress towards achieving a coherence and internal logic during the study period, and the growing body of specialised social studies teachers may enable the subject to achieve a unique identity and academic credibility within New Zealand secondary schools. Further research in the field would facilitate these goals.

8.4 FURTHER RESEARCH

Five suggestions for further research have arisen from the study. They include (i) gender differences of senior social studies teachers; (ii) students' reasons for subject choices in the social sciences; (iii) effective pedagogies in senior social studies; (iv) implications for policy development; and (v) implications for teachers.

8.4.1 GENDER DIFFERENCES – SOCIAL STUDIES STAFFING

Five of the seven lead educators in the research were women. The classroom teachers represented a mix of men and women. Evidence of 'personality led' implementation by strong women (idealists) was provided (e.g., INF1; INF2; RES16). A male member of the focus group, PAR2, expressed his suspicion that there is more hostility to social studies from male teachers than female, other than the 'missionaries'. Further study into gender differences as a factor in teachers' differing responses to the implementation of senior social studies, especially in relation to the component social science disciplines, would be worthwhile.

8.4.2 STUDENTS' REASONS FOR SUBJECT CHOICES IN THE SOCIAL SCIENCES

The study considered teachers' responses to the introduction of social studies for the new assessment and qualifications system, the NCEA. Without the decisions of students who have opted for the new subject in the senior secondary school, however, these teachers would not have had a subject to implement. The sibling rivalries of the traditional social science subjects revealed competition for scarce resources, including students. Not only have students had choices of achievement standards within the NCEA, they have also been able to select unit standards in the traditional social science subjects and in legal studies and sociology in some schools. The tension between students preferring the internally-assessed standards over the externally-assessed standards has been noted in the current study.

The decisions made by students in relation to (i) opting into the social sciences in the senior secondary school; (ii) their impressions of social studies in the junior secondary school; (iii) their selection of one social science subject over another; (iv) of entering into mixed courses (chapter five); (v) of electing unit standards rather than achievement standards;⁵⁶ (vi) of entering for internally-assessed standards over externally-assessed standards are all worthy of further research. Although national surveys have been undertaken by the NZCER, subject-specific research could be undertaken by the subject associations or by an independent researcher.

8.4.3 EFFECTIVE PEDAGOGIES IN SENIOR SOCIAL STUDIES

Bernstein (1971) identified three message systems in education – curriculum, pedagogy and evaluation or assessment. Pedagogy can be regarded as the link between curriculum and assessment. The current study focused on the first and third message systems – curriculum and assessment. The decision not to focus on pedagogy was made due to the fact that this was not an observational study.

⁵⁶ In future years this will not be an issue as in 2008 work has commenced on merging the achievement standards and unit standards, to be termed 'assessment' standards, as part of the realignment process.

Nonetheless, some discussion of suitable pedagogies for senior social studies emerged during the élite interviews and the focus group meetings. Two of the lead teachers commented that the pedagogical approaches of the sociology teachers in the Beacon Schools' Project were very suited to contemporary approaches in social studies.

The recent publication of the Best Evidence Synthesis for the social sciences, *Effective Pedagogies for the Social Sciences/Tikanga ā iwi* (Aitken & Sinnema, 2008) provides an excellent literature base for research into pedagogies undertaken in senior social studies and sociology. Classroom-based research into effective pedagogies for senior social studies could include teachers' perceptions of and strategies for curriculum integration. Such research could elucidate a clearer statement of the nature and purpose of social studies in the senior secondary school. In addition, the findings of the research might trickle down to impact upon pedagogies in the junior secondary school and to clarify the nature and purpose of the subject at that level. It may be that the clarification of the nature and purpose of social studies will be a major outcome of senior social studies.

My initial focus on the values exploration process is still worthy of further study, although this process is now subsumed within the more holistic social inquiry process in the NZC (MoE, 2007). The new emphasis of the process on students being able to write about effective participation through appropriate social action and being able to reflect on their own social action has already been adopted as a research focus by two other social studies researchers.

8.4.4 IMPLICATIONS OF THE RESEARCH FOR POLICY

The current study has highlighted the problematic nature of a new subject for an assessment and qualifications system over and above what could reasonably be considered teething problems for all subjects. The Beacon Schools' Project was set up to support subjects which had not been previously examinable in the senior secondary school. The Beacons' Project for social studies benefited the

staff of ten selected schools and filtered to some neighbouring schools. The Project did not achieve the intended goal of widely spreading good practice due to the failure to publish the units and assessment tasks written during the project. Therefore a 'them and us' situation arose. Further research on support needed for new subjects should concentrate on the role of face-to-face contact in relation to professional support via the internet, the role of subject advisers and of the subject association.

8.4.5 IMPLICATIONS OF THE RESEARCH FOR TEACHERS

Changes to curricula heralded by the NZC for the compulsory sector, such as school-based curricula, have implications for teachers in the post-compulsory sector. The proliferation of mixed courses, proposed changes to the previously strongly classified subject history and to a lesser extent geography are likely to contribute to the changing senior secondary school social science landscape. Teachers' professional conversations based on Bernstein's (1971) notion of the classification of knowledge need to occur. This would prepare teachers to change their approaches to senior school curricula in the light of new conceptions of knowledge (Gilbert, 2005). The rigid affiliation of some teachers toward their parent discipline, their reliance on content and prescription would be challenged. In this process, advocates of each of the component social science subjects would move closer towards an appreciation of their similarities and uniqueness.

The discussion now turns to three identified limitations of the study.

8.5 LIMITATIONS OF THE STUDY

The first limitation was the method of selecting participants for the study. I selected the teachers for the focus group and the schools for the postal survey from those offering the level one internally-assessed values exploration achievement standard AS90218 in 2005 and/or 2006. This reflected the rather narrow focus of my early research. As my focus broadened, I could have selected the sample in other ways, especially for the postal survey which occurred

towards the end of the data gathering period. On consideration, however, I think that keeping to the teachers of AS90218 provided some continuity. Furthermore, if I had selected only from those offering the externals, I would have overlooked a large group of schools who were only offering the internals.

The second limitation is the small sample for the élite interviews. Only seven people were interviewed during phase one of the research. The people approached were the key lead educators at the time (2005-2006) of whom I was aware. Since that time other leaders have emerged in the community. Some lead educators who were not interviewed in phase one were also classroom teachers will have completed the postal survey (phase three).

The third limitation was the decision not to pursue a study of pedagogies used in senior social studies. The three 'message systems' in education identified by Bernstein (1971) included curriculum, pedagogy and evaluation or assessment. Indeed, pedagogy can be seen to be the link between curriculum and assessment. Pedagogies suitable for senior social studies were discussed by members of the focus group to a small extent as well as by INF1 and INF2. As already noted in section 8.4.3, this focus is worthy of further research.

8.6 CONTRIBUTION TO THE RESEARCH

This study makes a contribution to the research in two ways. Firstly, it contributes to the small body of social studies research in New Zealand. Much previous research has focused on the contested phases of curriculum developments at policy level rather than on teachers' lived experiences and responses to change. The role of citizenship education and of the values exploration process have been the focus of a number of publications, but have not been backed with empirical data. The ERO Report (2001) did start providing some observations based loosely on empirical data which was followed by a more rigorous *National Schools Sampling Survey* (McGee et al, 2002). Further, several official reports have tended to focus on teaching in the primary school,

especially at years 4 and 8 such as the National Education Monitoring Project Reports (Crooks & Flockton, 1997, 2001, 2005) and ERO Report (e.g., ERO, 2006). This is therefore the first study of social studies in the senior secondary school and one of the few of secondary school social studies in New Zealand.⁵⁷

In terms of the research on the NCEA, a number of studies have been released particularly since 2005. Some of these reported studies are on a national scale (e.g., Alison, 2005; Hipkins 2007b; Meyer et al, 2006), while others are subject-specific (e.g., Hipkins, Conner & Neill, 2006a; Hipkins & Neill, 2006c; Rawlins, 2007). In terms of the social sciences, the only subject-specific research to date has been that of teachers' responses to the implementation of geography (Hipkins et al, 2006a). This research therefore addresses a major gap in the subject-specific literature relating to the initial implementation of the NCEA.

The next section provides a postscript which outlines developments which have occurred since the end of the data gathering period, 2005 to 2006.

8.7 POSTSCRIPT

A number of developments have occurred since the end of the data gathering period. These include (i) the publication of the *New Zealand Curriculum [NZC]* (MoE, 2007) and associated support documents for social studies due for implementation in 2010 and (ii) the realignment of the NCEA unit and achievement objectives in response to the NZC due for implementation in 2011.

8.7.1 SUPPORT FOR TEACHERS WITH THE NEW ZEALAND CURRICULUM

The publication of the NZC has raised a number of issues for teachers. The minimalistic and weak portrayal of the social sciences at the 'back end' of the NZC as opposed to the other learning areas is a serious concern for the social studies community (Appendix M). Support documents for the social sciences

⁵⁷ The recently released Best Evidence Synthesis *Effective pedagogy in social sciences/Tikanga ā Iwi*. is discussed in the postscript, section 8.7.2.

community have been recently published by the MoE, including *Approaches to Social Inquiry* (MoE 2008a), *Belonging and Participating in Society* (MoE, 2008b) and *Thinking Globally 1 & 2* (MoE, 2008c) (to support *The Economic World* strand of NZC). Another in this *Building Conceptual Understandings in the Social Sciences* series is planned for 2009 on the concept of Globalisation.⁵⁸ These support documents will augment the minimalist portrayal of social studies in the NZC thus providing some guidance for teachers.

Online support for social science teachers has not been so readily forthcoming. A number of delays have occurred, particularly over an interim initiative to establish the *CliK* website into which a large amount of time and money was invested. Whereas UNITEC was under contract to publish the *SSoL* website on TKI until December 2003, Cognition Consulting has been under contract since 2008 to establish a new *Social Sciences Online* site which will be hosted on TKI using the *eZyPublish* platform which is in development.

It is planned that *Social Sciences Online* will host a separate section for senior social studies which will include:

1. An on-line forum
2. A teacher resource exchange
3. Links to suitable web-based resources
4. Some rationalising of *SSoL* material
5. Units and assessment activities developed through the Beacon Schools' Project (2004-2006) which will be hosted on a non-quality assured site.
6. In addition, units developed in 2006, updated to reflect *Effective pedagogy in social sciences/Tikanga ā Iwi* (Aitken & Sinnema, 2008) and NZC (MoE 2007) and changes to the social studies achievement standards, will be hosted on a quality-assured site.⁵⁹

⁵⁸ Wood, B., pers. comm. 14.12.07.

⁵⁹ Wood, B., pers. comm., 14.12.07.

The emphasis of *Social Sciences Online* will therefore be on building a learning community within each of the subject areas in which teachers can share best practice rather than providing units of work and assessment activities in the way that *SSoL* did.⁶⁰

The *NZC* is considered by members of the social studies community to embody a number of social studies approaches, especially in its 'front end'. For example, the vision, principles, values and effective pedagogy sections of the *NZC* all resonate with the conceptual, social justice, effective participatory citizenship goals of social studies. There is potential for social studies to provide the foundation for integrated programmes, especially in years 9 and 10 as is already being planned by a number of schools (INF7).

8.7.2 CURRICULUM AND ASSESSMENT REALIGNMENT

The publication of *NZC* has also resulted in the need to realign the existing achievement standards of the NCEA, originally written in 1999, with the new or revised curriculum achievement objectives. This alignment process has been occurring in the latter months of 2008 and into 2009 and is due for implementation in a phased sequence from 2011.

Once again, a rethinking process is underway. This is especially so within the social sciences in history. A major paradigm shift is being debated, with a move from a current focus on a wide range of highly prescribed topics, to a more conceptually-based, weakly classified approach (Appendix N).

The alignment process is also merging unit standards and achievement standards into 'assessment standards'. This is intended to reduce the two-tier system which did emerge within the NCEA despite the 'parity of esteem' accorded to both unit and achievement standards within the system. Within the social sciences,

⁶⁰ Coogan, P., pers. comm., 14.12.07.

consideration is to be given to looking at the links between the sociology unit standards and social studies achievement standards (INF1).

8.8 FINAL THOUGHTS – LOOKING TO THE FUTURE

What can be done to consolidate the position of social studies within the senior secondary school curriculum? A number of schools have opted into senior social studies and considerable resources have been provided since 2002. Quite quickly a number of schools also opted out, especially if they were offering a level one social studies course to their accelerated year 10 students. In this case a number of schools elected to drop the externals while others dropped internals due to moderation issues. At the national level, a number of short term decisions have been made without the whole community being involved. Teachers of senior social studies have lacked the sense of security about their practice that typifies the more traditional social science subjects.

If senior social studies is to become a viable subject of choice for students in the senior secondary school and if the subject is to continue to have contemporary relevance then the whole community needs to pull together. Open and honest discussion needs to take place between all players – officials, lead educators and classroom teachers. Strong leadership is needed at MoE, NZQA and ANZFSSA levels. The existence of smaller groups within the already small social studies community (e.g., Beacons and non-Beacons schools, lead educators and non-lead educators) has created unintended schisms. The nostalgia expressed for the strong leadership by the Curriculum Division of the DoE in previous decades (e.g., Chalmers, 2005; Vossler, 2002) signals the need for a similar level of leadership in the early 21st century.

Teachers who have already shown leadership need to be supported with realistic time allowances and other resources in order to assist other teachers and nurture newcomers to senior social studies. The discussions and leadership need to be mindful of the dual roles of senior social studies - both as a full course and also as

a contributor to mixed courses. In this way, good practice will continue to be shared, possibilities will be explored, networks will be extended, and the community will develop a sense of certainty about their practice.

Some progress has already been made to establish a unique identity and some internal logic for social studies within the social sciences. For example, the *Guide Notes on the Perspectives* aimed to clarify the use of the term perspectives used in a variety of ways in the social sciences community. Two more sets of *Guide Notes* have been published, more are possible. The unifying theme must be clarified and disseminated to the community to reduce the disparate nature of the topic contexts studied. Resources must be invested to enable officials, lead educators and classroom teachers to meet on a regular basis for face-to-face discussions in order to build a strong sense of community. The experiences of senior social studies teachers may well assist the historians as they grapple with a more weakly classified curriculum.

The need to provide quality materials to support teachers of senior social studies is on-going. The establishment of the *Social Sciences Online* website must be expedited. Units and resources produced must have a clear curriculum purpose and be academically robust. The five year gap between the cancellation of the *SSoL* contract and the provision of a new site has been detrimental to the new subject. Another critical factor in the low level of effective resourcing has been the failure to publish the Beacons' resources despite their high level of funding. The Beacons' Project may have achieved more effective outcomes if it had been extended for another year. The provision of more detail and guidance in the *Examiners' Reports* would also be helpful for classroom teachers.

Other forms of support are also needed. The provision of senior social studies specialists as regional advisers is vital, especially for schools wanting to introduce new programmes and for new staff. Colleges of Education have risen to the challenge to provide papers on senior social studies so that new graduates

should be well prepared. The revitalisation of ANZFSSA, especially its regional associations, is also imperative in providing on-going support for teachers of senior social studies.

The implementation of senior social studies provided a stimulus for social studies, a golden opportunity for the social studies community. Small pockets of enthusiasts have emerged but the conflicting responses identified in this study showed a community still divided and not all heading in the same direction. It is difficult to identify any new initiatives which would have the same potential to stimulate growth and development in the way that senior social studies could.

As an idealist, the writer is hopeful that with effective commitment and support, senior social studies will be able to carve a unique and more powerful niche within the social sciences in a changing educational landscape. It will be driven by the idealists amongst the contemporary pioneers. I hope that the subject will be able to claim the academic credibility within the secondary school curriculum that it has strived for over the last six decades.

APPENDICES

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National Certificate of Educational Achievement

*New Zealand's world class qualification
a qualification not a way of learning*

*By Annette Sharp, Principal, Girls
Grammar School, past President, North
Shore Branch*

Why NCEA?

In 1993, New Zealand educators from the secondary and tertiary sectors and industry training organisations attended a conference at Auckland University of Technology (AUT), North Shore City, at which the concept of a National Qualifications Framework (NQF) was launched by the then head of NZQA, David Hood. The NQF concept followed the development of the Tomorrow's Schools model for school governance and management and paralleled the publication of the New Zealand Curriculum (1993), which identified essential skills across seven learning areas.

There was a clear recognition that the world had changed significantly since the previous examination system was first introduced, with great controversy, in the 1940s: new technology and new ways of working, students staying longer at school, with more choice and the need for a qualifications system that could recognise a broader range of achievement. It was also acknowledged that an education system that accepted failure for 50% of its students was not

It was to address these issues and to bring coherence to the national qualification that,

in 1998, the then National government agreed to the implementation of NCEA and standards-based assessment. The move to standards-based assessment was a major pedagogical shift for educators, and an ideological shift for the community and assessment practice in NZ, a shift that has been both challenged and challenging and that has led to strong debate through the often difficult period of implementation.

The NQF has since gone through a number of iterations in the school sector, although many industry-based National Certificates have been completed. It was not until 2002 that Year 11 students in New Zealand secondary schools first presented for Level 1 of the National Certificate of Educational Achievement (NCEA). Since 2002, approximately 250,000 students have now studied for NCEA and, with the initial structures and management in place, there is space for review, refinement and further development.

The NCEA is now New Zealand's national secondary school qualification and was introduced to provide a more comprehensive record of what students achieve while they are at school and to give them a basis for ongoing learning and an interface with their future qualifications and careers. Many of the first group of Level 3 NCEA students will complete their under-graduate degrees at the end of 2007.

What is NCEA and how does it work?

NCEA stands for the National Certificate of Educational Achievement. NCEA allows students to study at three levels of attainment- usually in Years 11 to 13, previously known as the Fifth, Sixth and Seventh Forms. When it was introduced in

2002, NCEA Level 1 replaced School Certificate, Level 2 replaced Sixth Form Certificate in 2003 and Level 3 replaced University Bursary in 2004. The competitive New Zealand Scholarship examination, not a qualification, was reintroduced in 2004.

Standards

NCEA is a standards-based qualification. Standards of performance have been established for all work done by students that needs to be assessed or tested. Each standard sets out clearly and comprehensively what students need to know and to do to be credited with meeting the standard. Generally, a traditional school subject (eg mathematics, English, science) is divided into 5-7 standards, each worth between 2 and 5 credits, representing particular topics, skills or knowledge. These Achievement Standards, developed through extensive consultation with teachers, are linked to areas of learning identified in the New Zealand Curriculum. Unit Standards are developed by Industry Training Organisations (ITOs) or standards bodies. To gain NCEA certificates, students must reach a set total number of credits at each level, eg 80 credits at Level 1, made up from Achievement or Unit standards or a mix of both. This is similar to the way in which university degrees are awarded. Each standard is assessed, in a manner appropriate to the learning, knowledge and skills involved, by:

- external assessment (a written examination or submission of a portfolio) against achievement standards for school subjects;
- internal assessment (designed and marked by their teachers) against

achievement standards for school subjects;

- internal assessment against unit standards developed by industry.

Internal assessment is moderated against the standard by consideration of a small sample of work from students in a school in designated subjects/standards. Students who meet the criteria for an achievement standard are deemed to have Achieved, Achieved with Merit (for very good performance) or Achieved with Excellence (for outstanding performance demonstrating higher order thinking skills). Achieving the standard with Merit or Excellence does not alter the number of credits gained. Students who meet the criteria for a unit standard, achieve the standard. Internally assessed standards are moderated.

There is a programme for review of the standards. For example, the Level 1 mathematics standards have been recommended for significant modification to reduce fragmentation of the subject. Previously, the Ministry of Education has reviewed achievement standards, and the Qualifications Authority has reviewed the unit standards, these often being offered in schools to expand courses of study and provide pathways to work and tertiary study. In the future, these reviews will be done at the same time so that issues of duplication and parity of credit values can be considered.

21st Century New Zealand - a nation of learners and thinkers

NCEA is a way of assessing learning. It does not determine the learning. The focus is on assessment appropriate to the learning so that students can demonstrate

what they have learned. The Record of Learning (soon to be known as the Record of Achievement) provides a detailed profile of a student's knowledge and skills.

The New Zealand curriculum is currently under review to ensure that schools teach the skills, competencies and learning areas that will equip our 21st century learners for a global economy in which industries will grow and disappear, in which critical thinking, problem-solving, interpersonal skills, adaptability and teamwork, creativity and innovation will be important. The Ministry of Education will release the 'new' New Zealand curriculum later in 2007. Achievement standards will be aligned with the revised curriculum so that assessment does not drive the curriculum or constrict learning only to what will be assessed.

NCEA is designed to allow students to gain credit for skills and knowledge that are not suited to examinations and to provide equal status for theoretical and practical learning. It is intended to allow students to work towards a national qualification at the pace that best suits them, while recognising achievement in a wide range of studies. Some schools have created new courses by using standards from two or more learning areas. For example, environmental studies include science and geography standards.

NCEA Certificates

NCEA Level 1: at least 80 credits including 8 Level 1 numeracy and 8 Level 1 literacy credits.

NCEA Level 2: at least 60 credits from Level 2 (or above) standards, with at least 20 other credits from any Level (any of the existing Level 1 credits count).

NCEA Level 3: at least 60 credits from Level 3 standards and at least 20 other credits from any Level (any of the existing credits count).

University Entrance: to be considered for University Entrance, students must have gained:

- a minimum of 14 Level 1 (or higher) credits in mathematics;
- a minimum of 8 Level 2 (or higher) credits in English or te reo Maori. Four of these must be in reading and four in writing and must be gained in approved unit standards and/or achievement standards.
- a minimum of 42 Level 3 credits from at least three and no more than four subjects from an approved list.

From 2007, NCEA certificates will be endorsed with Merit or Excellence if the predominant number of credits is achieved with either Merit or with Excellence. This change is designed to motivate the most able students and to encourage them to complete all the standards in their course of study to the best of their ability.

From 2008, subject endorsement with Merit or Excellence will also be introduced. This change is aimed at reducing fragmentation and incomplete learning and achievement across a subject.

Beyond school

School-leavers are able to complete or build on their NCEA at polytechnics, universities, wananga, and accredited private training establishments. NCEA results are recognised by employers throughout New Zealand and overseas. NCEA is used for University Entrance in New Zealand and overseas universities, and for selection purposes for other tertiary

courses. Many top scholars decide to study at overseas universities and gain admission based on Achievement with Excellence and Merit in NCEA

and their New Zealand University Entrance qualification. Anecdotal evidence is that these students acquit themselves well in their university studies, as do those in New Zealand universities. School students who choose less traditional subjects and gain credits towards National Certificates are able to take their Record of Learning to their tertiary studies or workplace learning and complete those Certificates.

Other students, who would previously have left the school system without qualifications, are now able to leave school and enter the workforce with NCEA Level 1 and/or National Certificates and have confidence in their ability to learn and achieve. We face an ongoing challenge in our schooling system to adapt to the needs of students with a wider range of interests, abilities and aspirations, and an expectation that learning will continue beyond secondary school, throughout life, and also to provide for students who might once have left school to go to low skill jobs.

Why NCEA for 21st century learners and teachers?

Our Generations Y and Z will be working and living in a global economy where innovation, enterprise, problem-solving skills, creativity and life-long learning will matter more than recall, prescriptive tasks and competitive assessment, where the balance of knowledge and skills and sustaining community values will be critical. For Generation Y and Z students, many skills will become redundant as technology and needs change. This is not a new phenomenon, but the rate of knowledge and skill redundancy is increasing. These students will need flexibility and resilience, adaptability and confidence in their ability to learn and to work in teams as well as independently.

NCEA is central in the move towards personalized learning across our education system, with its potential for students to construct learning pathways and to gain recognition for their particular talents and abilities. An online tool is being developed so that students can monitor their own achievement and plan their future learning pathways to suit their goals.

The challenges

NCEA success is to some extent dependent on intrinsic student motivation through the development of thinking skills and knowledge and the desire to learn and achieve in preparation for an unknown future.

While examinations have always proved to be a cost effective way to manage mass assessment, NCEA provides a balance of this form of assessment and internal assessment does, however, present on-going workload issues for many teachers and some students. These issues are a matter for teachers to manage in conjunction with the Ministry of Education and NZQA. The move to have full-time moderators and up-to-date exemplars on line will provide much-needed support for teachers, but will not address the workload impact of internal assessment.

Students are managing on-going assessment, as well as taking part in sport, arts, cultural and service activities. It is not easy to see how best to make the workload equitable across internally and externally assessed credits or how to reduce the overlap of assessment events for any one student. Administrative workloads are also heavy in schools, with data entry, data recording and transfer of data to and from NZQA. In return, however, there is now a wealth of student and cohort achievement data available from NZQA about individual and student cohort achievement, which assists in planning and programme evaluation.

NCEA is a more complex qualification and assessment system than the previous models. The world is also more complex. Schools must continue to explain NCEA to students and parents, particularly to the adults who are themselves 'graduates' of the previous School Certificate, Bursary and Sixth Form Certificate pass/fail or

ranking system. With NCEA, all assessment schedules must be thorough and well-moderated, as there is no scaling. Random sampling is being developed with the intention of increasing the number of samples of students' work moderated from the current 3% to 10%. Monitoring of internal and external assessment results within schools is planned as a further check on, or assurance of, the accuracy of assessment.

While recently announced developments in NCEA will, in part, address issues such as student motivation, moderation and consistency, credibility, transparency, and confidence, all of which have been raised by parents and students and by Professor Luanna Meyer's research on NCEA, there will no doubt be further developments to meet the changing needs of learners and the dynamic nature of education.

I know that many principals, teachers and students are encouraged by the ongoing developments of NCEA, and that the developments strengthen the credibility of the system and increase confidence in it. Modifications to the system will provide further support for teachers and will encourage and motivate students to do their best and to complete a full course of study, ensuring that New Zealand school leavers gain a world class New Zealand qualification.

Appendix B: Phase Two - Information sheet given to participants

Implementation of the values exploration process in the Social Studies curriculum: What are the 'tensions of practice' for senior secondary school teachers?

Who am I?

My name is Rowena Taylor and I am a student enrolled for an EdD in the College of Education at Massey University. I am employed as a Lecturer in Social Studies and Geography Education at Massey University College of Education, Palmerston North.

How can I be contacted?

I can be contacted at:

Department of Social and Policy Studies in Education

Massey University College of Education

Private Bag 11-222

Palmerston North

Phone (06) 3569099 ext 8753; Fax (06) 3513385;

Email R.M.Taylor@massey.ac.nz

What is the study about?

I have been involved in Social Studies education for all of my teaching career. I am particularly interested in the recent development of Social Studies in the senior secondary school since the introduction of NCEA in 2002. In particular, I am interested in the implementation of the values exploration process, one of the three Social Studies processes at level 1 NCEA. The values exploration process, it has been claimed, is the least understood and most problematic, of the three processes. I contend that the way it has been constructed into an assessment activity for Achievement Standard 90218 is at odds with the original purpose of the process, which derived from the values clarification movement of the 1970s.

The research will contribute significantly to the paucity of data on the implementation of the Social Studies in the New Zealand Curriculum document, mandated since 2000. In particular, it will shed light on the values exploration process. Values and attitudes have been mentioned in official policy documents in the 60 year history of Social Studies, but strategies for implementing and assessing them in the classroom have been lacking from the official documents until the development of the NCEA Achievement Standards, introduced in 2002. I contend that the interpretation of this process by the writers and the resulting achievement standard constrains the effective teaching, learning and assessment of this process.

The research will be based on participatory action research, with 6 to 8 teachers who are currently teaching level 1 Social Studies (particularly those who have students enrolled in

AS 90218) will be involved in four days of focus group meetings. The teachers and researchers will clarify their understandings of the goals of Social Studies, the history and purpose of the values exploration process, ways in which teachers interpret and implement it in their classrooms. We will then co-create an intervention strategy for teachers to trial in their classrooms, which will form the basis for our discussion at the next action research day. We will then create another strategy, and so on for the four days. In between times, teachers will be asked to keep a learning journal during the period of days in which they implement the strategy as well as annotating a photocopied sample of student work.

How can you assist?

In your capacity as a teacher of NCEA Level 1 Social Studies, of either a year 10 or a year 11 class, I would like to invite you to participate in the research. This will involve:

1. Four days of action research, one per term, in 2005, at Massey University, Palmerston North. Your teacher relief costs for each day will be paid plus cost of travel at 50 cents per km. Morning tea, lunch and afternoon tea will be provided. At each day, participants will work together to share and develop understandings and strategies for values exploration.
2. The keeping of a scrapbook in which you will:
 - a. Keep a journal of your experiences, concerns, suggestions during the day(s) in which you implement the strategy co-constructed at the action research day
 - b. Photocopy a sample of student work from the strategy implementation and annotate it in light of headings which we will decide on as a group

Note that the scrapbook will become the property of the researcher at the conclusion of the four days of action research.

3. An opportunity to be part of an on going support network will be set up for members of the group.

What benefits will there be for you?

This will provide a professional development opportunity for you. You will be working with other teachers who are implementing Social Studies at Level 1 NCEA, in particular the Values Exploration Achievement Standard 90218. In addition to the professional discussions of the four action research days, you will:

- Be part of an ongoing support network of teachers in a similar, and somewhat lonely, professional situation
- Have the opportunity to publish electronic or hard copy versions of our strategies for implementing the Values Exploration Process
- Have the opportunity to contribute to the wider Social Studies community eg through possible workshops or publications

How will the information be used?

I will audio tape the four days of action research discussions. I will then use the tapes to help me synthesise the information under a variety of key headings. The summary from each day will be sent to you for your approval and you may wish me to make changes.

The information from your learning journal and annotated student work will augment the summaries to provide the basis of the data for my thesis which will be submitted as part of my EdD qualification and future publications, academic and teacher focussed, on this topic.

Will the information you provide be confidential and anonymous?

The names of the teachers, and indirectly the students, involved will not be published. You will be identified as Teacher X. Student work will have any names removed. Parental and student permission will also be sought for use of student work.

What will happen to the data on the completion of the project?

On completion of the project, recorded audio tapes will be destroyed after 5 years.

All material will be removed from computers after the research is complete.

What are your rights as a potential participant in this research?

You have the right:

- *To decline to participate;*
- *To refuse to answer any particular questions;*
- *To request that the tape recorder be turned off at any particular time;*
- *To withdraw from the study at any time;*
- *To ask any questions about the study at any time during the participation;*
- *To provide information on the understanding that your name will not be used unless you give permission to the researcher;*
- *To be given access to a summary of the findings of the study when it is concluded*

What should I do if I wish to participate in the research?

Please fill in the accompanying consent forms and return to me at the above address.

I will get in touch with you to arrange an interview time after receiving these forms.

This project has been reviewed and approved by the Massey University College of Education Human Ethics Committee, Application 05/001. If you have any concerns about the conduct of this research, please contact Dr Judith Loveridge, Chair, MUCE Human Ethics Committee, Hokowhitu Campus Palmerston North, phone 06 3569099 ext 8957, email J.Loveridge@massey.ac.nz

Appendix C: Phase One: Letter to principal of pilot school

Principal
School
Address

Dear

I am an EdD (Doctor in Education) student at Massey University College of Education, where I am also employed as a Lecturer in Social Studies education.

I am conducting research into the implementation of Social Studies in the senior school, especially at year 11 (NCEA Level 1). I have been impressed with the innovative senior Social Studies programme that has been implemented at your school by your HOF Social Sciences, xxxx

I would like to invite you to ask xxxx to be part of my research. This would involve her in four one hour interviews over the first two terms of 2005. I will provide payment for teacher relief and I will travel to xxxx to conduct the interviews. I am also happy to provide ongoing professional support for xxxx as required during 2005.

The information will be used as a case study in my research. It will be followed up by participatory action research with a group of six to eight teachers who are less experienced at implementing senior Social Studies. The information gained from the interviews will be used as starters for the action research cycles in which teachers will co-construct their understandings of the values exploration process and co-create strategies to trial with their classes.

I look forward to your response. I can be contacted at the above address or email R.M.Taylor@massey.ac.nz, phone (06) 356 9099 ext 8753.

Yours sincerely

Rowena Taylor

Appendix D: Phase One: Questions, pilot study

INTERVIEW SCHEDULE – PILOT STUDY SCHOOL

*Implementation of the values exploration process in the
Social Studies curriculum:
What are the ‘tensions of practice’ for senior secondary school teachers?*

Four one hour interviews with possible follow up.

Interview One - General – curriculum goals

1. Tell me what makes you so enthusiastic about teaching senior Social Studies.
2. What motivated you to implement the subject in your school?
3. What have been ‘critical incidents’ for you in the implementation of senior social studies?
4. What do you see as the main goals of Social Studies?
5. When people talk about citizenship education goals for Social Studies, what does that mean to you? How does this link to your main goals?
6. How do you communicate such big picture goals to your students?
7. How do your students react to this subject?
8. To what extent do you feel that as a Social Studies teacher, you have a duty to ‘educate for social responsibility’?
9. To what extent do you think Social Studies enables students to consider themselves as part of society and to contribute to the ‘common good’? What factors enable or constrain this?
10. To what extent do you feel your programme enables students to become effective, participatory citizens?
11. What are the ‘tensions’ for you in relation to the stated and implicit goals of Social Studies?

Interview Two - Values Exploration

1. How do you define the terms
 - a. Values
 - b. Values positions
 - c. Values exploration
2. Where do you think the values exploration process has come from?
3. How did you implement this process in year 9-10 social studies?
4. Do any of these strategies/definitions etc overlap in to level 1 Social Studies?
5. What sorts of issues do you study in your year 11 programme?
6. How comfortable do you feel in facilitating discussions about contentious issues?
7. To what extent do you require your students to reflect on their own values as a result of conducting the values exploration process? What happens..
8. To what extent are there differences between your students in how they react to debating and reflecting on such issues?
9. Have you noticed any differences between students with wider world views as opposed to those who are more egocentric?
10. To what extent has your implementation of the values exploration process changed since:
 - a. Becoming a marker
 - b. Undertaking the University of Waikato’s values exploration module
 - c. Being part of the Beacon Schools’ Project

11. How do you approach the study of *consequences* (short and long term)of values positions..
12. What other ‘tensions’ do you experience when dealing with this affective realm of Social Studies?

Interview Three - Assessment

1. Do you consider there to be a tension between what you think values exploration is all about and the method by which it is assessed at level 1?
2. To what extent do you consider the NCEA assessment of the values exploration process to be fairly much a comprehension, ‘fill in the box’ exercise? Does it allow for lateral thinking?
3. How much time would you spend on the values exploration standard as a ‘stand alone’ internal standard versus integrated with an external standard?
4. Can you give me some examples of how different students approach/cope with this achievement standard?
5. Have you thought of other ways in which this achievement standard could be written and assessed? Please explain.
6. To what extent do you provide formative opportunities?
7. What links are there between level 1 *Examine differing values positions* and the achievement standards for levels 2 and 3?
8. NZQA statistics show that the Values Exploration achievement standard at level 1 is the most popular of the five achievement standards, and has the highest rate of ‘achieved’ or better (94% in 2003). Can you suggest reasons for this?
9. What other ‘tensions of practice’ are you aware of in your assessment of the values exploration process at level 1?

Interview Four - Professional Development

1. I remember when you started planning for NCEA level 1 in 2002 and you were seeking help on the SSOL Forum and there was little support out there for you – how did this make you feel?
2. Why did you still go ahead?
3. What kind of professional support do you find most helpful as a teacher?
4. As the sole teacher of senior Social Studies in your school until recently, what tensions did this generate for you?
5. To what extent were the NCEA training days beneficial to your understanding and ability to implement senior Social Studies?
6. Can you identify some internal and some external factors that have contributed to your success in implementing the values exploration process at level 1? Please explain..
7. To what extent do you rely on ‘tacit understandings’ as an experienced Social Studies teacher?
8. How has becoming a marker contributed to your professional development?
9. How else could your professional communities support you?
10. In what ways do you see yourself as contributing to the professional development of other teachers as they embark on senior Social Studies?
11. What other tensions associated with professional development are you aware of?

Appendix E: Phase Two - Letter to principals

The Principal
School
Address

Dear

I am a post graduate student at Massey University College of Education, undertaking research for my EdD degree. I am also a lecturer in Social Studies Education at this institution.

I am seeking teachers of NCEA Level 1 Social Studies, particularly those with students enrolled in Achievement Standard 90218, *Examine differing values positions*, to be involved with my research. This achievement standard addresses the values exploration process, regarded as the most problematic and least understood of the three Social Studies processes. I am intending to undertake action research with a group of 6 to 8 level 1 Social Studies teachers in order to improve the effectiveness of teaching, learning and assessment of this important process.

I seek your permission to approach your HOD Social Sciences in order to ask him/her to pass on my invitation to participate in this research to the appropriate teacher in that department. The research will involve four days during 2005, one per term, for which I will pay teacher relief costs, as well as travel costs to Palmerston North at 62 cents per km. The participants will also be required to keep a journal during the day(s) in which strategies are trialled with their class as well as annotated student work. Parental and student permission will be sought for the right to use photocopies of student work for research purposes. Confidentiality of both the teachers and students will be a high priority.

Please return the tear off slip by Friday 18 February, 2005.

Thank you in anticipation
Yours sincerely
Rowena Taylor

.....
Please fax to Rowena Taylor, Fax (06) 351 3385 by 18 February 2005

1. We do/do not offer NCEA Level 1 Social Studies at our school in 2005.
2. I do/do not give permission for you to approach my HOD Social Sciences in order to pass on an invitation for the appropriate teacher to be involved in the research.

Name:
School:

Dated:

Appendix G: Phase Three: Postal Survey, Letter to HoDs plus questionnaire

10 October 2006

HoD Social Sciences
School
Address

Dear Colleague

I am conducting research for my doctoral thesis on the implementation of Social Studies for NCEA since its introduction in 2002. Initially my focus was on AS 90218, *Examine differing values positions*, but the scope has expanded beyond that.

I have enclosed a questionnaire which I am sending to all schools which offered AS90218 in 2005 and/or 2006. I am requesting that your teacher or teachers of this achievement standard will complete this questionnaire to enable me to complete this research. To my knowledge, I am the only person researching the implementation of senior Social Studies. I have conducted a series of in depth interviews with key people involved at national level as well as four days of action research with a group of four teachers of Level One Social Studies over a 12 month period.

I have been a teacher and HOD Social Studies at Palmerston North Girls' High School for 16 years, before moving into teacher education firstly at Wellington College of Education then Massey University College of Education for the last six years. I have written and edited Social Studies Online units and been active in ANZFSSA (Aotearoa New Zealand Federation of Social Studies Associations).

The title of my thesis is:

Implementation of the values exploration process in the Social Studies curriculum: What are the 'tensions of practice' for senior secondary school teachers?

I would be grateful if you would pass on this questionnaire to the appropriate teacher(s) of level one Social Studies to complete. If there is more than one teacher at this level, I would appreciate if each would complete a separate questionnaire. Please return to me in the stamped addressed envelope provided by Friday November 3, 2006.

Thank you very much for your cooperation. I look forward to being able to share my findings with the Social Studies community next year.

Yours sincerely
Rowena Taylor
EdD Student
R.M.Taylor@massey.ac.nz

This project has been evaluated by peer review and judged to be low risk. Consequently, it has not been reviewed by one of the University's Human Ethics Committees. The researcher named above is responsible for the ethical conduct of this research.

If you have any concerns about the conduct of this research that you wish to raise with someone other than the researcher, please contact Professor Sylvia Rumball, Assistant to the Vice-Chancellor (Ethics & Equity), telephone 06 350 5249, email humanethicspn@massey.ac.nz.

Questionnaire re Implementation of NCEA Social Studies

Please return to Rowena Taylor in the enclosed envelope by **Friday 3 November**

Section 1: School Data

- 1.1 Character of your school:
- | | | |
|-------------------------------------|---|--------------------------------|
| <input type="checkbox"/> Urban | <input type="checkbox"/> Rural | |
| <input type="checkbox"/> Single sex | <input type="checkbox"/> Co-educational | |
| <input type="checkbox"/> State | <input type="checkbox"/> Integrated | <input type="checkbox"/> Other |

1.2 The school roll is approximately:

1.3 The school's decile rating is:

1.4 How many teachers are involved in teaching senior Social Studies at each level?

- Level One Level Two Level Three

1.5 The status of Social Studies within your school:

The senior management team regard Social Studies compared to other social sciences as:

- more important same less important

The senior management team regard Social Studies compared to other NCEA subjects as:

- more important same less important

Section 2: Senior Social Studies in your School

2.1 We currently offer NCEA Social Studies at:

- Level One Level Two Level Three

2.2 We first offered Level One Social Studies in:

- 2002 2003 2004 2005 2006

2.3 We offer Level One Social Studies to:

- Accelerate year 10 Social Studies classes
 Mixed ability year 11 classes
 Lower ability year 11 classes
 Other, please specify

2.4 We offer:

- A full course of externally and internally assessed Social Studies achievement standards
 The internally assessed achievement standards only
 A mix of internally assessed achievement and unit standards
 Other – please specify

Section 3: Professional Development and Support

3.1 My NCEA training days:

- I attended all Social Studies days

- I attended some Social Studies days
- I attended another subject – please specify.....
- I learnt about Social Studies achievement standards during my teacher training
- I did not attend any NCEA training days
- Other – please specify.....

3.2 On-going professional development:

- I am in regular contact with an adviser in senior Social Studies
- I have a senior Social Studies ‘buddy’ within my school or from another school
- I have been involved in the Beacon Schools’ Project
- I am involved nationally as a lead teacher
- I get support from my local Social Studies Association
- I feel professionally isolated in implementing senior Social Studies

Please add any further comments about your on-going PD for senior Social Studies

.....

3.3 Do you regard your teaching of your junior Social Studies classes to be better as a result of teaching senior Social Studies? Yes No

Please comment

.....

3.4 Do you teach other senior subjects? Yes No

If yes, please specify.....

3.5 Is your primary allegiance to Social Studies or your other senior subject(s)?

- Yes Same No

3.6 What are your main sources of written information about senior Social Studies (not just AS90218)? (please rank: 1 = most frequently used)

- Examiners’ Reports
- TKI website
- Social Studies Online website
- New Zealand Journal of Social Studies
- Other (please specify)

3.8 Resources: What are your main sources of information for your senior Social Studies programme? (please rank: 1=most frequently used)

- Internet
- Videos
- Newspapers & magazines
- Social Studies texts from the junior school
- Online units
- Other (please specify).....

Section 4: The Values Exploration Process

4.1 What topics or contexts have you used for teaching and assessing AS 90218? 2006.....
Previous years (if different).....

4.2 How do you define the term 'values position' with your students?
.....

4.3 The Perspectives:
Have you accessed the paper *Guide Notes for Using the Perspectives* disseminated in the April NZQA Update about the relationship between perspectives, values positions and viewpoints?
Yes No

If yes, has this paper clarified the relationship for you? Yes No
Please comment
.....
.....
.....

4.4 Do you share your own values position with students on issues discussed in class?
 Frequently Occasionally Never

Section 5: Citizenship Education Goals

5.1 Do you articulate citizenship education goals with your students?
 Frequently Occasionally Never

5.2 Do you encourage students to engage in critical inquiry and debate about society and social issues?
 Frequently Occasionally Never

5.3 Do you encourage/enable students to take social action as a result of your studies?
 Frequently Occasionally Never

If you have, please give examples of social action your students have taken
.....
.....
.....

5.4 Do you consider yourself to be a social activist in your teaching of senior Social Studies?
 Frequently Occasionally Never
Please comment
.....
.....

Section 6: Standards Based Assessment

6.1 Do you think that values can be effectively assessed?
 Agree Neutral Disagree

6.2 Do you use templates for assessing AS 90218?
 Always Frequently Occasionally Never

If occasionally or never, please give examples of alternative assessment tasks

.....
.....

6.3 Do you use conferencing with students as a means of ascertaining their level of achievement in AS 90218?

Frequently Occasionally Never

6.4 Do you find the moderation system for the internally assessed standards fair and helpful?

Frequently Occasionally Never

6.5 Assessment 'drives' my programme:

Agree Neutral Disagree

Section 7: The Future for Senior Social Studies

7.1 What do you consider to be the prospects for senior Social Studies in your school over the next 5 years?

Level One:

.....

Level Two:

.....

Level Three:

.....

7.2 Has the introduction of senior Social Studies in your school impacted on numbers in the other social science classes? Yes No

Please comment:

.....
.....

7.3 Please add any other comments you have about the implementation of senior Social Studies in your school

.....
.....
.....
.....

7.4 Please add any other comments you have about your experiences of implementing AS 90218 that you wish to share

.....
.....
.....
.....

Thank you very much for taking time to complete this questionnaire.

Rowena

Survey Questions	Original Research Questions	Revised Research Questions
Section 1 School details	Profile information	Profile information
Section 2 Role of senior social studies in school; teachers teaching senior social studies	Profile information	Profile information RQ1 How have the differing personal & professional dispositions of teachers impacted on the implementation of senior social studies?
Section 3 Professional development and support	RQ4 How do senior social studies teachers access support to create new programmes? How do they overcome issues of professional isolation?	RQ4 To what extent have the profession communities of practice supported teachers in their implementation of senior social studies?
Section 4 The values exploration process	RQ1 How do teachers conceptualise, define, explain and implement the values exploration process in senior social studies?	RQ2 How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?
Section 5 Citizenship education goals	RQ2 To what extent do teachers accept and articulate citizenship education goals as the key focus for senior social studies?	RQ2 How has the implementation of senior social studies reflected historical conflicts within social studies curriculum developments?
Section 6 Standards-based assessment	RQ3 To what extent does the level one achievement standard AS90218 enable or constrain the assessment of the values exploration process in the way that it was intended?	RQ3 How has the introduction of standards-based assessment enabled and constrained the implementation of senior social studies?
Section 7 The future five years	General information - future trends	General information - future trends

Appendix H: Schools' Intentions to Offer Level One to Three Social Studies in Future -2007-2011

1. Schools Offering Level One Only in 2006

School Identifier	Group	Type of course @ Level One	Level 1	Level 2	Level 3
1	All year 10	Internals	Yes, year 10	No	No
2	Year 10 acc	Internals	No	No	No
3	Year 10 acc	Internals	Yes, year 10 extension	No	No
4	Year 10 acc	Full	Unsure	Unsure	Unsure
6	Year 10 acc, group not class	Full	Yes, year 10 extension	No	Possibly
7	Year 10 acc	Full	Yes, year 10 extension	No	No
9	Year 10 acc	Internals	Yes, year 10 extension	No	No
11	All year 10	One internal	Yes, year 11	No	No
12	Year 10 acc	Internals	Yes, year 10 extension	No	No
13	Year 10 acc	Internals	Yes, year 10 extension	Unsure	Unsure
15	Mixed ability year 11	Full	Possibly	Unsure	Unsure
19	Year 10 acc	One internal	No	No	No
26	Year 10 acc	Full	Yes, year 10 extension	No	No
27	Lower ability year 11	One internal, Composite US & AS	No	No	No
29	Year 10 acc	Internals	Yes, year 10 extension	No	No
30	Year 10 acc	Internals	Yes, year 10 extension	No	No
31	Mixed ability year 11	Full	Unsure	No	No
33	International students	Composite US & AS	No	Yes	No
35	Year 10 acc	Internals	No	No	No
36	Lower ability year 11	Internals	Yes	No	No
37	All year 10	One internal	Possibly	No	No
Total = 21 schools			Yes = 12	Yes = 1	Yes = 0

Acc = Accelerated

AS = Achievement Standards

Full = Full course of internally-assessed and externally-assessed achievement standards

US = Unit Standard

2. Schools Offering Levels One & Two in 2006

5	Level one to mixed ability year 11	Composite US & AS	Yes	Yes	No
14	Level one to mixed ability year 11	Full	Yes	Possibly	No
24	Level one to mixed ability year 11	Full	Yes	Yes	No
Total = 3			Yes = 3	Yes = 2	Yes = 0

3. Schools Offering Levels One, Two & Three in 2006

8	Level one to mixed ability year 11	Full	Yes	Unsure	Unsure
10	Level one to mixed ability year 11	Composite US & AS	Yes	Yes	Yes
16	Level one to mixed ability year 11, plus some Ass to year 10	Full	Yes	Yes	Yes
18	Level one to mixed ability year 11	Full	Yes	Yes	Yes
20	Level one to lower ability year 11	Composite US & AS	Yes	Yes	Yes
21	Level one to mixed ability year 11	Full	Yes	Yes	Yes
22	Level one to mixed ability year 11	Full	Yes	Yes	Yes
23	Level one to mixed ability year 11	Full	Yes	Yes	Yes
25	Level one to mixed ability year 11	Full	Unsure	Unsure	Unsure
28	Level one to mixed ability year 11	Full	Unsure	Unsure	Unsure
34	Level one to mixed ability year 11	Full	Yes	Unsure	Unsure
Total = 11			Yes = 9	Yes = 7	Yes = 7

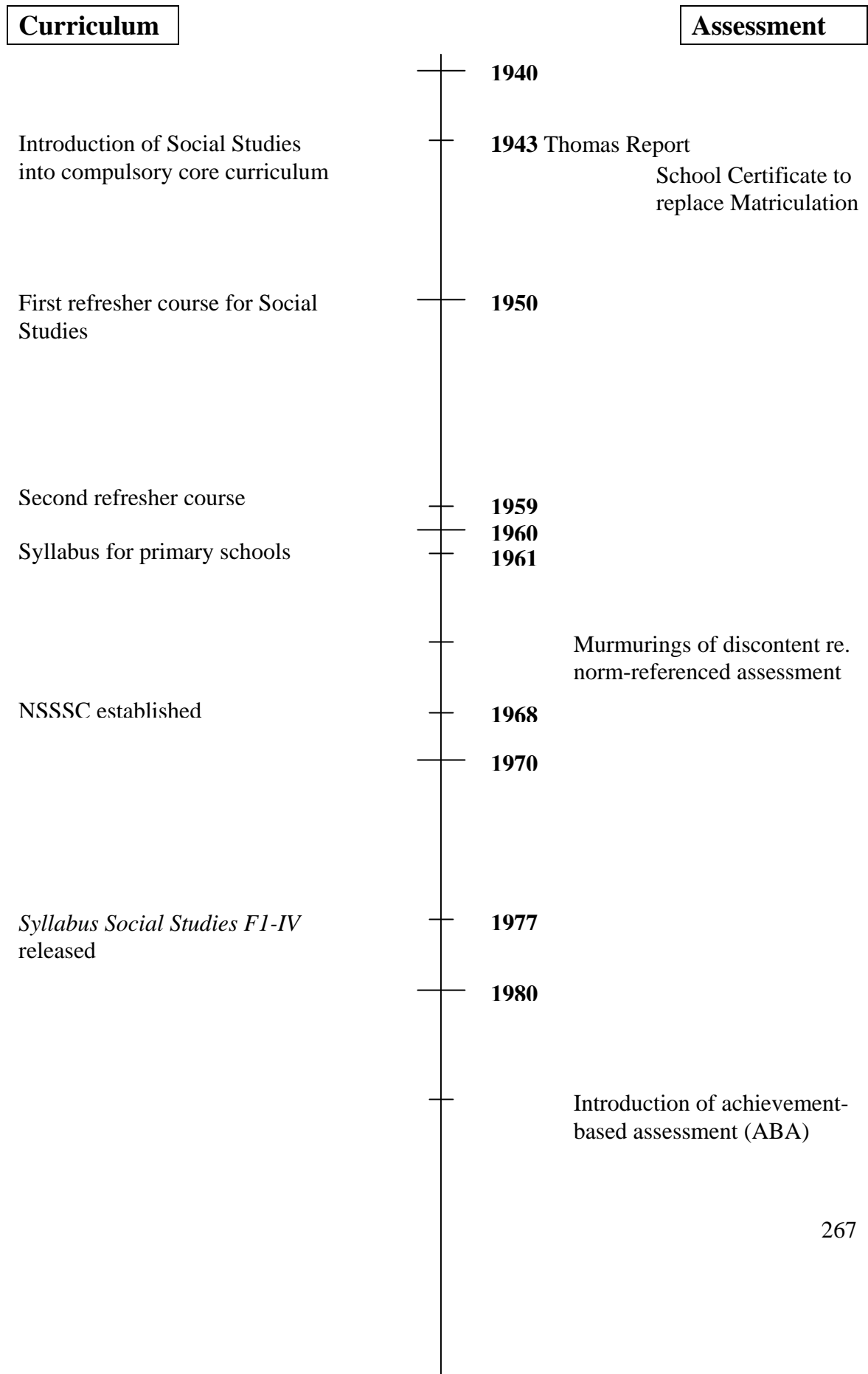
Nil/Incomplete returns

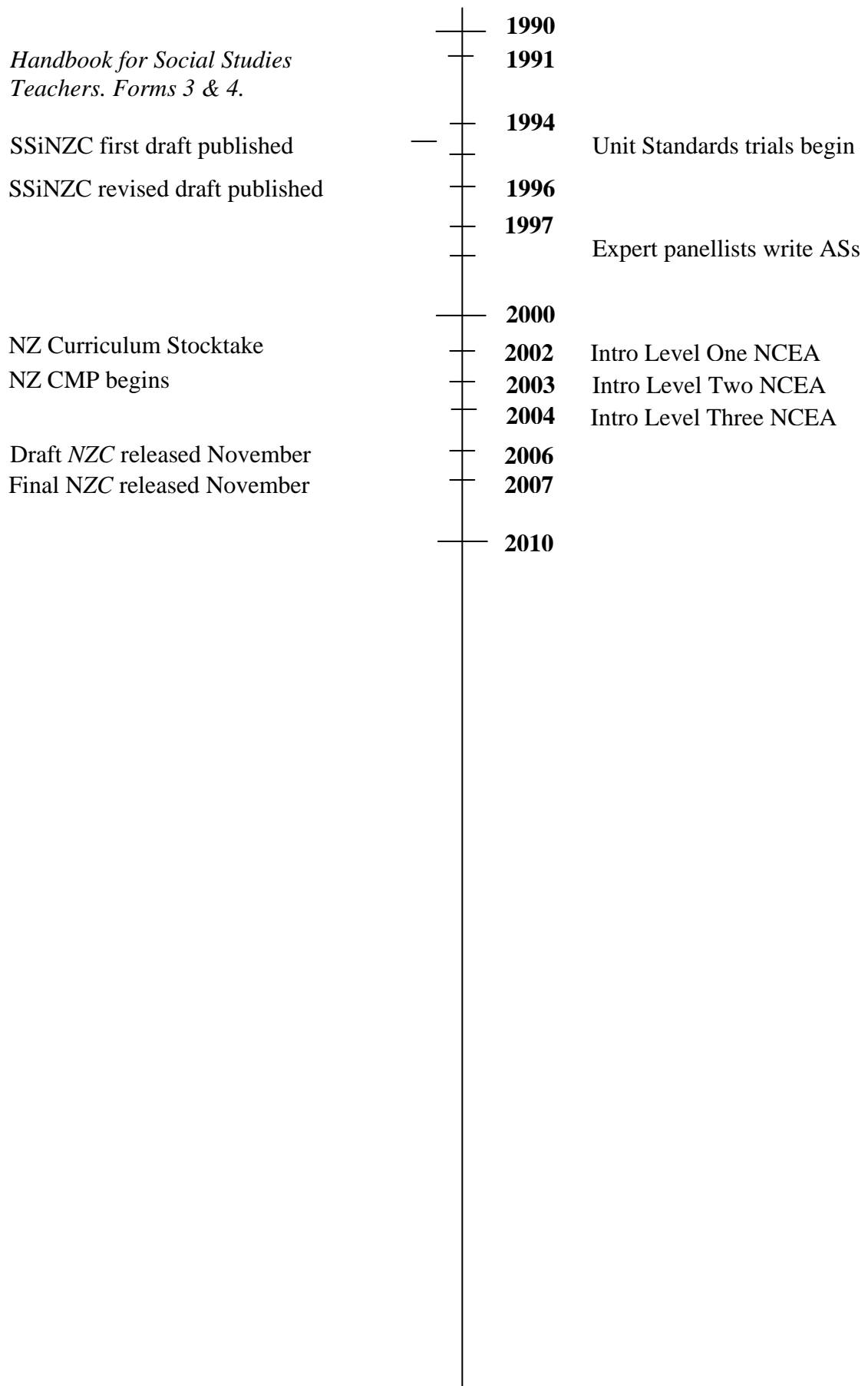
School 17 - One internal (AS90218) for Environmental Science Course

School 32 - One internal (AS90219), no longer offered

School 38 - Introducing some level two & three internals in mixed courses with science from 2007.

Appendix I: Time Line of New Zealand Curriculum and Assessment Developments 1940 - 2010





Appendix J (a); Essence Statement, *The New Zealand Curriculum Framework* (Ministry of Education, 1993), p. 14.

Social Sciences

Tikanga-ā-iwi

A broad understanding of society is essential if students are to take their full place within it as confident, informed, and responsible participants.

Through the social sciences, students will develop the knowledge and sense of perspective needed to understand and appraise New Zealand's changing society and economy. They will examine the ways in which people from different cultures, times, and places make decisions, and meet their physical, social, emotional, and spiritual needs. Students will be helped to understand their rights, roles, and responsibilities as members of a family and as citizens in a democratic society.

An emphasis will be placed on learning about New Zealand society. This will include an understanding of the Treaty of Waitangi, and of New Zealand's bicultural heritage and multicultural society. Societies which have close relationships with New Zealand, such as communities of the South Pacific and Asia, will also be an important focus. Students will develop an awareness of New Zealand's place in the international environment, and of global issues of public interest.

Students will be challenged to think clearly and critically about human behaviour, and to explore different values and viewpoints. Such learning will help them to clarify their own values and to make informed judgments. Commonly held values, such as concern for social justice and the welfare of others, acceptance of cultural diversity, and respect for the environment will be fostered, along with commonly valued attributes, such as individual initiative, effort, and responsibility.

Students will also develop a wide range of general and specific skills, including skills in research, critical and creative thinking, communication, and social participation.

Students will learn how and why change and continuity have affected people's lives in various contexts and times. They will examine the events, beliefs, and forces which have shaped our world. They will explore the influence of different groups and individuals on society, including the contributions and achievements of both women and men. Students will develop their understanding of their own culture and heritage, and those of others. They will study New Zealand histories, including Maori perspectives, and will gain an awareness of different interpretations of the past.

Students will gain an understanding of how people in different places have interacted with the environment, and how they make decisions about, and manage or mismanage resources. Students will learn about economic processes, such as how people produce, exchange, and use goods. They will develop an awareness of the present and future role of work in their lives. They will gain an understanding of economic activities, including those important to New Zealand, such as agriculture, forestry, fisheries, and tourism, and an awareness of New Zealand's dependence on marketing and trade.

To provide balanced learning in the social sciences, schools will ensure that all students participate in a wide variety of experiences, drawing on a range of subjects. In particular, schools will provide for learning in social studies, history, geography, and economics.

Appendix J (b): Essence Statement, *The New Zealand Curriculum* (Ministry of Education, 2007), p. 30.



*Unuhia te rito o te harakeke kei whea te kōmako e kō?
Whakatairangitia – rere ki uta, rere ki tai;
Uī mai koe ki ahau he aha te mea nui o te ao,
Māku e kī atu he tangata, he tangata, he tangata!*

What are the social sciences about?

The social sciences learning area is about how societies work and how people can participate as critical, active, informed, and responsible citizens. Contexts are drawn from the past, present, and future and from places within and beyond New Zealand.

Why study the social sciences?

Through the social sciences, students develop the knowledge and skills to enable them to: better understand, participate in, and contribute to the local, national, and global communities in which they live and work; engage critically with societal issues; and evaluate the sustainability of alternative social, economic, political, and environmental practices.

Students explore the unique bicultural nature of New Zealand society that derives from the Treaty of Waitangi. They learn about people, places, cultures, histories, and the economic world, within and beyond New Zealand. They develop understandings about how societies are organised and function and how the ways in which people and communities respond are shaped by different perspectives, values, and viewpoints. As they explore how others see themselves, students clarify their own identities in relation to their particular heritages and contexts.

How is the learning area structured?

Achievement objectives for social studies at levels 1–5 integrate concepts from one or more of four conceptual strands:

Identity, Culture, and Organisation – Students learn about society and communities and how they function. They also learn about the diverse cultures and identities of people within those communities and about the effects of these on the participation of groups and individuals.

Place and Environment – Students learn about how people perceive, represent, interpret, and interact with places and environments. They come to understand the relationships that exist between people and the environment.

Continuity and Change – Students learn about past events, experiences, and actions and the changing ways in which these have been interpreted over time. This helps them to understand the past and the present and to imagine possible futures.

The Economic World – Students learn about the ways in which people participate in economic activities and about the consumption, production, and distribution of goods and services. They develop an understanding of their role in the economy and of how economic decisions affect individuals and communities.

Understandings in relation to the achievement objectives can be developed through a range of approaches. Using a social inquiry approach, students:

- ask questions, gather information and background ideas, and examine relevant current issues;
- explore and analyse people's values and perspectives;
- consider the ways in which people make decisions and participate in social action;
- reflect on and evaluate the understandings they have developed and the responses that may be required.

Inquiry in the social sciences is also informed by approaches originating from such contributing disciplines as history, geography, and economics.

Learning based on the level 1–5 social studies achievement objectives establishes a foundation for the separate social science disciplines offered in the senior secondary school. At levels 6–8, students are able to specialise in one or more of these, depending on the choices offered by their schools. Achievement objectives are provided for social studies, economics, geography, and history, but the range of possible social science disciplines that schools can offer is much broader, including, for example, classical studies, media studies, sociology, psychology, and legal studies.

Appendix K: AS90218 Achievement Standards 2002, 2004 & 2008

Achievement Standard

Subject Reference	Social Studies 1.4				
Title	Examine differing values positions				
Level	1	Credits	4	Assessment	Internal
Subfield	Social Science Studies				
Domain	Social Studies				
Registration date	13 December 2001	Date version published	13 December 2001		

This achievement standard involves an understanding of why people hold differing values positions and the consequences of these. It requires the demonstration of this through at least one of: Māori and/or bicultural perspectives; multicultural and/or gender perspectives; settings in New Zealand and beyond; perspectives on current issues and/or the future.

Achievement Criteria

Achievement	Achievement with Merit	Achievement with Excellence
<ul style="list-style-type: none"> Explain why people hold differing values positions. Describe some consequences of people holding differing values positions. 	<ul style="list-style-type: none"> Explain why people hold differing values positions. Describe a range of consequences of people holding differing values positions. 	<ul style="list-style-type: none"> Explain, with depth of understanding, why people hold differing values positions. Describe a range of consequences of people holding differing values positions and the significance of these.

Explanatory Notes

- This achievement standard is derived from the Level 6 achievement objectives from *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997, and *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātaranga, 2000.

- 2 Assessment will be consistent with the settings, perspectives and essential learning about New Zealand society, as defined in *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997, and *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātaranga, 2000.
 - 3 In this achievement standard students will be expected to demonstrate their knowledge and understanding of at least one of:
 - Māori and/or bicultural perspectives
 - settings in New Zealand or beyond
 - multicultural and/or gender and/or content and/or future perspectives
 - perspectives on current issues and/or the future.
 - 4 *Values positions* may be described as points of view.
 - 5 *Depth of understanding* means students must do one or more of the following as required by the assessment task:
 - classify reasons using social studies ideas and terms
 - describe and explain relationships and interrelationships between reasons and effects
 - use different perspectives to examine reasons and effects.
 - 6 *A range of consequences* could include: long term, short term, positive or negative, far reaching etc.
-

Quality Assurance

- 1 Providers and Industry Training Organisations must be accredited by the Qualifications Authority before they can register credits from assessment against achievement standards.
- 2 Accredited providers and Industry Training Organisations assessing against achievement standards must engage with the moderation system that applies to those achievement standards.

Accreditation and Moderation Action Plan (AMAP) reference

0226

Achievement Standard

Subject Reference	Social Studies 1.4				
Title	Examine differing values positions				
Level	1	Credits	4	Assessment	Internal
Subfield	Social Science Studies				
Domain	Social Studies				
Registration date	7 November 2003	Date version published	7 November 2003		

This achievement standard involves an understanding of why people hold differing values positions and the consequences of these. It requires the demonstration of this through at least one of Māori perspectives, bicultural perspectives, multicultural perspectives, gender perspectives, perspectives on current issues, perspectives on the future.

Achievement Criteria

Achievement	Achievement with Merit	Achievement with Excellence
<ul style="list-style-type: none"> • Explain why people hold differing values positions. • Describe some consequences of people holding differing values positions. 	<ul style="list-style-type: none"> • Explain why people hold differing values positions. • Describe a range of consequences of people holding differing values positions. 	<ul style="list-style-type: none"> • Explain, in depth, why people hold differing values positions. • Describe a range of consequences of people holding differing values positions and the significance of these.

Explanatory Notes

- 7 This achievement standard is derived from Level 6 achievement objectives from *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997, and *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātauranga, 2000.
- 8 Assessment will be consistent with the settings, perspectives and essential learning about New Zealand society, as defined in *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997, and *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātauranga, 2000.

- 9 In this achievement standard, students will be expected to demonstrate their knowledge and understanding of at least one of:
- Māori perspectives
 - bicultural perspectives
 - multicultural perspectives
 - gender perspectives
 - perspectives on current issues
 - perspectives on the future.
- 10 *Values positions* may be described as points of view.
- 11 *People* refers to individuals and/or groups.
- 12 *In depth* explanation will demonstrate a clear understanding of Social Studies concepts and perspectives.
- 13 *A range of consequences* could include: long-term, short-term, positive or negative, far-reaching, etc.
-

Quality Assurance

- 3 Providers and Industry Training Organisations must be accredited by the Qualifications Authority before they can register credits from assessment against achievement standards.
- 4 Accredited providers and Industry Training Organisations assessing against achievement standards must engage with the moderation system that applies to those achievement standards.

Accreditation and Moderation Action Plan (AMAP) reference

0226

Achievement Standard

Subject Reference	Social Studies 1.4				
Title	Explain differing values positions				
Level	1	Credits	4	Assessment	Internal
Subfield	Social Science Studies				
Domain	Social Studies				
Status	Registered	Status date	5 November 2007		
Planned review date	28 February 2009	Date version published	5 November 2007		

This achievement standard involves an explanation of why people hold differing values positions and the consequences of this for society, using social studies concepts.

Achievement Criteria

Achievement	Achievement with Merit	Achievement with Excellence
<ul style="list-style-type: none"> • Explain why people hold differing values positions. • Identify consequences for society of people holding differing values positions. 	<ul style="list-style-type: none"> • Explain why people hold differing values positions. • Describe consequences for society of people holding differing values positions. 	<ul style="list-style-type: none"> • Explain, in depth, why people hold differing values positions. • Describe, in depth, consequences for society of people holding differing values positions.

Explanatory Notes

- 14 This achievement standard is derived from Level 6 achievement objectives from *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997; and *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātauranga, 2000.
- 15 Assessment against this achievement standard will be consistent with the settings, perspectives and essential learning about New Zealand society, as defined in *Social Studies in the New Zealand Curriculum*, Learning Media, Ministry of Education, 1997; and/or *Tikanga a Iwi i Roto i te Marautanga o Aotearoa*, Te Pou Taki Kōrero, Te Tāhuhu o te Mātauranga, 2000.
- 16 *Values positions* may be described as points of view.
- 17 *People* refers to individuals and/or groups.

- 18 *Explain* means to give an account and support with reasons, using social studies concepts and supporting evidence.
- 19 *Explain in depth* means to give an account and support with reasons, using social studies concepts, perspectives, and supporting evidence.
- 20 *Identify consequences* means to clearly state consequences using social studies concepts.
- 21 *Describe consequences* means to give a detailed account, using social studies concepts and supporting evidence.
- 22 *Describe in depth* means to give a detailed account using social studies concepts, perspectives and supporting evidence.
- 23 A *consequence* is an outcome or effect, eg long-term, short-term, positive, negative, economic, political.
- 24 A *social studies concept* is a general idea, thought, or understanding about society (expressed as a single word or phrase). *Conceptual understandings* are what the students know and understand about the concept(s) within a context. When students *use* concepts in a context they demonstrate what they know and understand about the concepts.
- 25 *Supporting evidence* means to use detail specific to the context, eg names, dates, places, statistics, quotations.
- 26 A *social studies perspective* is a worldview, ideology or theoretical position, which is backed by ideas and substantial and well-recognised theories. To demonstrate their understanding of perspectives within a context, students are expected to identify viewpoints linked to a specified perspective. These may include bicultural perspectives, multicultural perspectives, gender perspectives, cultural perspectives, social justice perspectives, environmental perspectives, current perspectives, and future perspectives.

Quality Assurance

- 5 Providers and Industry Training Organisations must be accredited by NZQA before they can register credits from assessment against achievement standards.
- 6 Accredited providers and Industry Training Organisations assessing against achievement standards must engage with the moderation system that applies to those achievement standards.

Accreditation and Moderation Action Plan (AMAP) reference

0226

Appendix L: Sample assessment AS90219 Schapelle Corby

Appendix L: Assessment activity – Corby Case

NAME: _____



National Certificate of Educational Achievement
TAUMATA MĀTAURANGA Ā-MOTU KUA TĀEA

2005

SOCIAL STUDIES

Achievement Standard 1.5 (90219)

Decide on social action(s) in relation to a social issue

Credits: 4

Should the Australian government intervene in the Schapelle Corby case?

Student Instruction Sheet

This activity requires you to consider various options on whether the Australian government should directly intervene in the Schapelle Corby case. Then you are to take on the role of the Australian Prime Minister and make and justify a preferred course of action.

Read all instructions carefully before you start.

CONDITIONS:

- Up to one week, class and homework time.
- Decision (Section B) to be written up in test conditions in class.

LAYOUT:

This A3 cover sheet contains the information you need. Inside is the situation and task instructions. The loose leaf pages are what you write your answers on. If you need more paper you may write on the back or use refill.

At the end it is very important that all these sheets are included within this A3 sheet and handed in together and in order.

If there is something you do not understand - ask!

Situation

The Schapelle Corby case has generated huge media and public interest in Australia and beyond. Many Australians, and some of those directly involved say the Australian government should do something to do with the situation.

You are the Prime Minister of Australia. You have asked for four submissions from different groups of people that outline their opinion on what the government should do and why. You have also asked an official from your department to briefly outline the consequences of each person's recommended course of action.

These consequences could be:

- positive, negative or neutral
- short term or long term
- related to individuals, communities, international relations

Finally you need to make a decision on what to do. This decision may not be exactly what any of the other people wanted. You must carefully justify this decision using sound reasoning and recognising the role of Prime Minister.

Tasks

Section A

On the 'A' forms provided give FOUR submissions giving recommendations of action from different people. For each action you should explain convincing reasons for doing it. For Excellence you will need to demonstrate a clear understanding of Social Studies concepts and the significance of the case as a current issue. *You should consider reasons from the perspectives (viewpoints) of the different groups of people affected.*

Following each person's submission, you must note the consequences of doing this action. These notes will be written by an official from your department. You must state *why* these consequences will occur.

Five 'A' forms have been provided but you do not *have* to fill in all five (but to get Excellence you will need at least four done very well - see Assessment Criteria on next page).

Section B (completed in class)

On the 'B' form that will be provided, you must make your decision as Prime Minister.

This recommendation should:

- Clearly **state** your preferred action/strategy
- **Justify** your preferred action/strategy with appropriate evidence and sound, logical and reasoned arguments. In this explanation you will explain why you rate some criteria (factors) more highly than others. It should weigh up the options and state why this is your preferred choice over the other options.

ASSESSMENT CRITERIA

Achieved

- State two possible and realistic actions in relation to the situation
- Identify the likely consequences of each action
- Identify, with reason(s) the preferred action(s)

Achieved with Merit

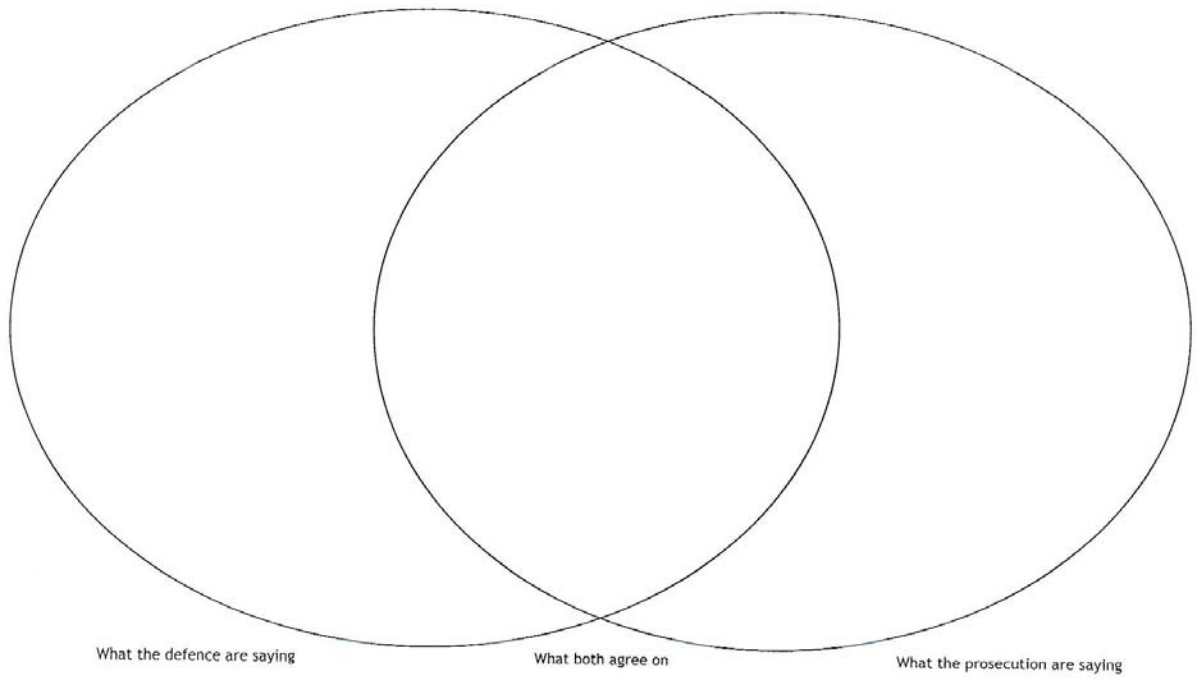
- State three possible and realistic actions in relation to the situation
- Explain the likely consequences of each of these actions
- Identify the preferred action(s) and justify with reasoned argument

Achieved with Excellence

- State four possible and realistic actions in relation to the situation
- Explain in depth, demonstrating a clear understanding of Social Studies concepts and the case as a current issue, the likely consequences of each of these actions
- Identify your preferred action(s) and justify with suitable evidence and convincing, logical and reasoned argument

*Remember that your preferred action may involve a **combination** of options but you must justify why you put the combination together in this way.*

THE SCHAPELLE CORBY CASE: WHAT IS AT DISPUTE?



PSYCHOLOGIST'S CASE NOTES

Name: _____

Role/position: _____

Involvement in case so far:

Responses to questions:

What is your opinion about the Schapelle Corby case?

Why do you think like this?

What actions have you done so far to support your point of view?

Psychologist's notes:

Values shown:

Possible future actions:

Reasons:

Briefing Papers to the Prime Minister of Australia

On

'The appropriateness of Australian government intervention in the case of Schapelle Corby, sentenced to 20 years imprisonment for drug smuggling into Indonesia'

List of attached papers:

	Name	Role/position
1		
2		
3		
4		
5		

Assessment schedule: Social Studies 1.5 (90219)
'Should the Australian government intervene in the Schapelle Corby case?'

Section A:

For Achievement the student will have	For Merit the student will have	For Excellence the student will have
(a) stated TWO possible and realistic actions (b) and identified likely consequences of each action.	(a) stated THREE possible and realistic actions (b) and explained likely consequences of each action.	(a) stated FOUR possible and realistic actions (b) and explained in depth, demonstrating a clear understanding of Social Studies concepts and the case as a current issue, the likely consequences of each of these actions

Section B:

For Achievement the student will have	For Merit the student will have	For Excellence the student will have
From the recommended actions <ul style="list-style-type: none"> • identified the preferred action(s) • and supported the choice with reason(s). 	From among the possible actions <ul style="list-style-type: none"> • identified the preferred action(s) • and justified the choice with reasoned argument. 	From among the possible actions <ul style="list-style-type: none"> • identified the preferred action(s) • and justified the choice with reasoned argument. The reasons are linked logically and supported with evidence to provide justification for the preferred actions(s).

Appendix M: Correspondence with the Minister of Education re NZC

22 November 2007

Hon Chris Carter
Minister of Education
Parliament Buildings
WELLINGTON

Dear Mr Carter

Re: The role of Social Sciences in the *New Zealand Curriculum*

As specialist Social Science teacher educators at Massey University College of Education, we would like to express our extreme disappointment at the portrayal of the Social Sciences in the recently released *New Zealand Curriculum* (Ministry of Education, 2007).

Specifically we would like answers to:

1. What is the rationale for so dramatically changing the achievement objectives from those outlined in the draft *New Zealand Curriculum* (Ministry of Education, 2006)?
2. Why is the social inquiry process not even mentioned in relation to the achievement objectives, even as a stem?
3. Why do the strand names, which led onto the level 6-8 subject names Social Studies, Geography, History and Economics, not appear on the achievement objectives page?
4. Why has the continuity from one level to the next been lost?
5. Why is there no uniformity in the presentation of the achievement objectives between the eight Learning Areas?
6. Why do all the Social Science achievement objectives have the verb stem 'understand' whereas the other Learning Areas use a variety of measurable verb stems?

While we were happy with the draft, we consider the final document totally marginalises the Social Sciences. There is a considerable body of literature which documents the low status of Social Studies in particular. This document clearly confirms this low status. Teachers will use the achievement objectives pages (which become the default curriculum) as a list of topics to be covered during the year. The emphasis is clearly on the acquisition of knowledge. The large number of social scientists involved in the hui from 2003 agreed on the importance of conceptual understandings rather than 'doing topics'. This document does not reflect the shifts in thinking during the development phase – in fact it is a step backwards for the social sciences.

We urge you to recall all the copies of the *New Zealand Curriculum* (Ministry of Education) and to remedy what has become an intolerable situation for Social Science educators.

Yours faithfully

Dr Graham Hucker	Senior Lecturer in Education
Dr Alison Sewell	Senior Lecturer in Education
Rowena Taylor	Senior Lecturer in Education
Rose Atkins	Senior Tutor in Education



Office of Hon Chris Carter
MP for Te Atatu
Minister of Education
Minister for Ethnic Affairs
Minister Responsible for the Education Review Office

24 JAN 2008

Dr Graham Hucker, Dr Alison Sewell, Rowena Taylor, Rose Atkins
School of Educational Studies
Massey University
Private Bag 11 222
PALMERSTON NORTH

Dear Graham, Alison, Rowena and Rose

Thank you for your letter of 22 November 2007 concerning social sciences in *The New Zealand Curriculum*.

As you will be aware the process followed to develop the curriculum involved considerable consultation over a period of time. Following the publication of *The New Zealand Curriculum: Draft for Consultation* a large number of submissions were received on different aspects, including the social sciences learning area statement and the achievement objectives. These submissions were considered and informed the final curriculum statement to which you refer. The social sciences summary feedback from the consultation process is attached.

The section on learning areas on page 38 of the new curriculum explicitly states that the learning area statement, rather than the achievement objectives, should be the starting point for planning. The learning area statement for the social sciences provides a general focus for teaching and learning at all levels. It outlines the nature of the four conceptual strands and states that the achievement objectives will integrate concepts from one or more of these strands.

The number and detail of the achievement objectives for the social sciences do not detract from its value as a learning area. *The Curriculum Stocktake* indicated that reducing the number of achievement objectives was a desirable outcome as teachers found the social studies curriculum statement confusing and complex. The achievement objectives require students to develop understanding, as you note. This is consistent with the previous social studies curriculum document which states that students should demonstrate knowledge and understanding. Many of the new achievement objectives begin with a statement that students will "understand how". This is intended to support critical thinking and more in-depth learning by students.

There is a framework provided for the social inquiry approach within the learning area statement that will guide schools' teaching programmes. Feedback on the draft curriculum indicated this was a key, but not the only, approach that could be used to support learning. As a consequence this is now contained within the learning area statement.

Parliament Buildings, Wellington, New Zealand Telephone: 64 4 470 6568, Facsimile: 64 4 472 8034
Email: ccarter@ministers.govt.nz Website: www.beehive.govt.nz

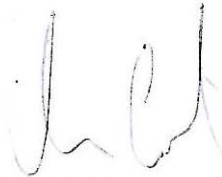
I understand that further social sciences support resources are in development, including resources to support teachers using key social studies concepts. As you point out, past reviews show that many teachers have struggled to understand how to plan effectively using social studies concepts. The Education Review Office identified recently that only 21% of teachers were effective or highly effective in all areas of teaching and learning in social studies. There is no intent to undermine the importance of conceptual development. The intent is to strengthen this key aspect in social studies.

Ministry of Education officials inform me that representatives from history, geography, economics, classics and senior social studies have been developing teaching and learning guidelines, including indicators for the achievement objectives in *The New Zealand Curriculum*. This work will also contribute to the review of the achievement standards in these subjects, planned for this year.

The combination of a new curriculum, new support resources and information from the quality teaching research and development project, in which I understand some of you are involved, should help teachers plan and improve their understanding of the social sciences learning area.

I trust that this explanation has clarified the thinking behind these recent curriculum developments.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Chris Carter', written in a cursive style.

Hon Chris Carter
Minister of Education

Encl.

Recommendations for Consideration in the Social Sciences :	Responses
<p>Consideration may be given to these concerns:</p> <ul style="list-style-type: none"> an over-emphasis on the New Zealand context and that more emphasis and recognition needed to be given to wider global/world studies. Comments regarding wider global/world studies were often linked to geography, sustainability issues, critical analysis and economics. 	<ol style="list-style-type: none"> The 1st paragraph in the learning area statement has been altered as follows : “The social sciences learning area is about how societies work and how people can participate as critical, active, informed, and responsible citizens. <i>Contexts are drawn from the past, present, and future and from places within and beyond New Zealand</i>” This also makes the Learning Area statement more consistent with the Learning Area summary (draft p. 13) – “In the social sciences, students explore how societies work and how they can participate and take action as critical, informed, and responsible citizens” The statement – “<i>the focus of the NZ curriculum is on NZ contexts</i>” has been removed and replaced by the following statement in para 3: <i>“Students learn about people, places, cultures, histories, and the economic world within and beyond New Zealand”</i> In the history achievement objectives we have commented that there is a strong emphasis on NZ, and suggested that the historians reconsider this focus.
<p>Consider the overall clarity of the achievement objectives and their associated areas:</p> <ul style="list-style-type: none"> Some respondents felt there were insufficient links with the previous curriculum document or insufficient clarity with the progressions between levels. 	<ol style="list-style-type: none"> <i>Levels 6-8 achievement objectives have been reworked</i> to improve clarity and to make progression more appropriate. In the case of history we have made comment rather than change because we consider it more appropriate that historians address clarity at this level. <i>Level 1-5 Achievement Objectives are currently being cross audited.</i> Most evidence about changes needed to level 1- 5 achievement objectives came from the development of the exemplars. Auditing against the previous curriculum

	<p>statement did occur in development and will be redone.</p> <p>6. <i>The stem into the achievement objectives has been reconsidered.</i></p> <p><i>The proposed stem is: "Students will gain knowledge, skills, and experience to understand how: "</i></p> <ul style="list-style-type: none"> - This will de-emphasise reference to <u>a</u> particular process (social inquiry) but to signal that a process is required, through the use of '<u>how</u>' in the stem - Reference to 'a range of settings' in the verb stem has been removed and is made more explicit in the Learning Area statement
<p>Consider the inclusion of the Treaty of Waitangi:</p> <ul style="list-style-type: none"> • Some respondents thought it was insufficiently evident in the essence statement or elsewhere. • Some consideration may need to be given regarding wider feedback on the inclusion of the Treaty of Waitangi in other areas within the curriculum as well. 	<p>7. <i>The Treaty of Waitangi has been explicitly referenced in paragraph 3 as follows:</i></p> <p><i>"Students explore the unique bicultural nature of New Zealand Society that derives from the Treaty of Waitangi."</i></p> <p>8. Further auditing to determine whether the achievement objectives levels 1 -5 help develop concepts important for learning about the Treaty will occur.</p>
<p>Consideration should be given to the visibility of issues regarding sustainability (in the environment or economically).</p>	<p>9. Amendment to 1st paragraph in Learning Area statement under 'why study the social sciences' – <i>"Through the social sciences, students gain knowledge, skills, and experience that help them to: better understand, participate in, and contribute to the local, national and global communities in which they live and work; engage critically with societal issues; and, evaluate the sustainability of alternative social, economic, political and environmental practices."</i></p>
<p>Consider that Human Rights were not sufficiently explicit in the curriculum</p>	<p>10. Include a new level 5 achievement objective to address this:</p> <p><i>Students will gain knowledge, skills, and experience to</i></p>

	<i>understand how people define and seek human rights</i>
Consider addressing some concerns that commerce, accounting and business studies were insufficiently evident and should be noted explicitly.	11. This has not yet been addressed. These are subjects at the senior end of the curriculum and beyond the mandate of the reworking of this curriculum.
Consider/address where the achievement objectives for the subjects which contribute to Social Sciences (e.g. Classics) would come from.	12. This has not yet been addressed. This subject at the senior end of the curriculum is beyond the mandate of the reworking of this curriculum. (Classics begins at level 2, achievement standards, level 7 of our current curriculum structure.
Consider increasing the prominence of civics and citizenship education.	13. Civics and citizenship is strongly embedded in the following statements and in the achievement objectives: “The social sciences learning area is about how societies work and how people can participate as critical, active, informed, and responsible citizens “ “Through the social sciences, students gain knowledge, skills, and experience that help them to better understand, participate in, and contribute to the local, national and global communities in which they live and work”. 14. Citizenship also embedded in social inquiry.
Consider the prominence of social inquiry	15. Social inquiry has been reframed to identify it as a key, rather than dominant, learning approach (refer to “a social inquiry approach”) 16. The dilemma was to signal the usefulness of Social Inquiry and why it is presented as a key approach. Its prominence as the only approach has been reduced, but it is still signalled as a key approach. 17. The need to explain WHY it is key was evident. Eg. “In a curriculum area that focuses on citizenship, participation and engagement” <i>The reference to social inquiry as a required process has been removed from the stem (“through this process....”) into each achievement objective:</i>

	<p>The proposed stem is now: <i>“Students will gain knowledge, skills, and experience to understand how: “</i></p> <p>18. It is proposed that: ‘A social inquiry approach’ box be positioned below the achievement objectives and be introduced with something like:</p> <p><i>“understandings in relation to the achievement objectives can be developed through a range of approaches, including social inquiry.</i></p>
<p>Consider the positioning of the Strand descriptions on the achievement objectives pages.</p>	<p>19. <i>Suggest that their position be reconsidered</i>, as they relate largely to Social Studies at levels 1-5. This is a design issue.</p> <p>20. Suggest that they may confuse teachers – they look like achievement objectives but are not intended as that. It is not clear that achievement objectives have integrated concepts from several of the strand descriptions. Two suggestions:</p> <ul style="list-style-type: none"> • <i>Are they better left just in the LA statement?</i> • <i>If they are to remain, remove the bullet points that indicate something is an achievement objective.</i>

History at a crossroad

The advent of the new school curriculum poses significant challenges for the subject of history, writes **GRAHAM HUCKER**

THERE IS MUCH going on behind the scenes today of teaching history in our secondary school classrooms. History teachers nationwide are busy discussing what their subject will look like from 2010 following the implementation of the New Zealand Curriculum (2007). Under this document, the learning area of history will change in ways that will rival the intensity of those that accompanied the advent of the NCEA qualification.

If the comments posted on the New Zealand History Teachers' Association (NZHTA) website are anything to go by, the learning area of history is a contested space where consensus on an array of issues about to affect the discipline may be difficult to reach. The next 15 months will be a crucial period for teachers because they know that what transpires from the discussions between themselves, the NZHTA, the Ministry of Education (MoE) and the New Zealand Qualifications Authority (NZQA), will shape and set the course of history teaching and learning in New Zealand for a very long time to come.

What is it about the new curriculum that has generated such a flurry of active discussion amongst history teachers? In short, the answer lies in the news that the current syllabus will be replaced with a curriculum based on achievement objectives. This structural shift means that the teaching of history, which has been based on prescribed topics of study for over three decades, will no longer exist.

Instead, teachers will have to look to the six new achievement objectives to drive what is to be taught from Years 11 to 13. This presents an initial problem of what historical content to teach because the objectives are not explicit on this matter, and this is what is causing some of the tension surrounding the introduction of a curriculum.

Of particular concern is a common phrase in most of the objectives, "past events that are of significance to New Zealanders". This has caused teachers to ask for clarification and definition, which the NZHTA has attempted to do albeit in a general way. Their general definition falls short of clarifying the word 'significance',

and this, I feel, is unfortunate because history education research in Britain has shown that historical significance is, indeed, a key aspect of the conceptual structure informing the discipline. Any past event will simply not do.

Some debate is needed here on what actually constitutes a 'past event' that is 'of significance' to people in New Zealand before teachers can feel comfortable with proceeding to plan for the future.

And yet, what to teach is only one contentious issue that has arisen out of this structural shift. An examination of the many and often lengthy comments posted by teachers on the NZHTA's website show an array of concerns, which by their presence reveal the need by history teachers to make a stand on the future of their subject. The breadth of this discursive discussion suggests that most concerns will be difficult to reconcile and that some teachers will be sorely disappointed with the outcome.

The teaching of history, which has been based on prescribed topics of study for over three decades, will no longer exist.

Of particular concern is the issue of assessment. This is, perhaps, the most difficult consideration confronting history teachers; the reconciliation or alignment of the new curriculum's achievement objectives with the standards of assessment for qualification purposes. Already work is well under way on this aspect by NZHTA representatives, MoE and NZQA staff.

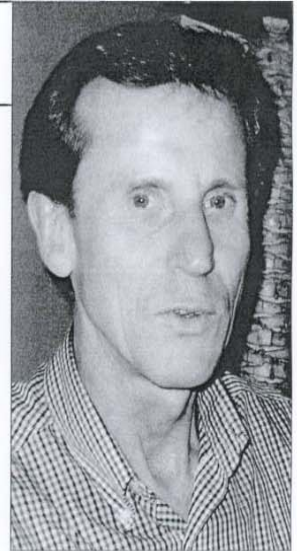
The interim result is the presentation of four optional matrices, which attempt to ally what could potentially be a fluid history curriculum seemingly without contextual boundaries with an already rigid assessment system that includes both internal and external standards. To reconcile this effectively will be no mean feat and history teachers from around New Zealand have recognised this by voicing

their concerns over the contents of the matrices.

The single most contentious concern emanating from the discussions about the matrices seems to be whether essays and sources should be generic or not, and the effects either way will have on history teaching and learning. Such options place teachers in an unenviable position of having to match an assessment pathway with a course of study emanating from a set of achievement objectives that no teacher has yet worked with. I wonder in the end how it will be decided which matrix is chosen as the single best option for the learning area of history.

There are other issues too, that have surfaced with the new curriculum. The essay, that long-standing convention of disseminating historical findings, is under reconsideration with the view of bringing it under the guise of a piece of extended writing, which has a strong sense of ambiguity about it. The issue of resources has also surfaced in teacher comments. Is there currently on the market, for example, a breadth of textbooks that will have the necessary range of content to effectively cover an array of contexts likely to emerge with the advent of a curriculum-based history course? In a curriculum that will have no prescribed topics, the search for appropriate resources will assume an importance all of its own. The achievement objectives contain other less prevalent words and phrases that do need some clarification if they are to be understood and planned for effectively. What, for example, can constitute "historical forces and movements", and how do relationships like "causes and consequences" of past events actually "shape the lives of people and society"? These matters do need some degree of discussion and they will be additional considerations facing teachers as they unpack the objectives.

However, coming to terms with those new objectives may yet prove energising for some teachers. Where prescribed topics may have once presented some constraints in the areas of periodisation, or in geographical scope, or in specific content, teachers may very well find that by engaging with the new curriculum that a whole



new world of historical possibilities open up to them. This could prove to be innovative and refreshing to a school history department that wishes to embrace some aspects of historical scholarship that "now encourages students of history to look for points of connection and intersection, for similarities and differences and transcends the boundaries of nation states".

History teachers have much to think about now in addition to their daily work tasks. Not only will the classroom be at the forefront of their thinking, but the whole fabric of history teaching and learning in those future classrooms will be as well. The scene is set now for some important developments to take place as a consequence of the discussions between the MoE/NZQA who are the drivers of the new curriculum, the NZHTA who find themselves holding the middle ground, and the teachers themselves who are by no means united on what it is they want to see for the learning area of history beyond 2010.

Graham Hucker is a former secondary school history teacher and now senior lecturer in education with the School of Educational Studies at Massey University in Palmerston North where he teaches a course on history education to graduate students.

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