# IJHLTR

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# EDITORIAL

Hilary Cooper and Jon Nichol

History and the pedagogy of history are certainly dynamic: The Secretary of State for Education in the new Coalition Government of Conservatives and Liberal Democrats in England is contemplating a new statutory history curriculum. He said, in his speech at the Conservative Party Conference, that children are growing up ignorant of one of the most inspiring stories that he knows, the history of our island story. We wait, with interest to learn the pedagogy through which they will learn this, although sitting in rows and dates of kings and queens have been mentioned. He does however appear to regard history as a core part of the curriculum. Following its marginalisation since 1997, this is welcome. In our recent utilitarian approach to education many people have not seen history as having much purpose. But Pol Pot tried to kill history. Forgetting the past can lead to something worse. Niall Ferguson, in *The Ascent of Money*, claims that if the bankers had known less maths and more history they would never have gone bust!

So we are delighted that this journal, which is the only journal publishing solely research into the purposes, aims and processes of teaching and learning of history, worldwide, is going from strength to strength. It publishes high quality papers from internationally eminent academics, teachers and lecturers. Their research is concerned with both primary and secondary history education, with policies, teacher education and classroom practice.

The foci in this issue are on strategies for teaching history, on pedagogy related to processes of enquiry and to identity, pedagogy related to values, attitudes and cross cultural links, pedagogy related to dealing with contesting memories of the past, pedagogy related to processes of historical enquiry. Other papers deal with the role of history in constructing national identity and citizenship. Of course, within and across all these areas there is a complex web of connections.

Peter Hillis contributes to debates about the pedagogy involved in developing knowledge, understanding and skills in history through his experience in designing, developing and evaluating multi media resources.

Anthony Blake and his colleagues consider how pre-service elementary school teachers can be helped to think creatively about history.

Hilary Cooper's and Cherry Dodwell's papers explore ways in which teaching and learning in history might develop awareness of social and moral dilemmas; through folk tales from different cultures (Hilary Cooper) and through drama (Cherry Dodwell).

Giorgos Kokkinos addresses the urgent need to find ways of approaching the controversial and historical past, proposing a methodological framework for balancing deep, comprehensive inclusive understanding and the moral responsibility of historical consciousness and presents examples of this approach.

Eleni Apostolidou describes a large scale study investigating Greek secondary school teachers' perceptions of history and history education which shows that, while previously there was a focus on Classical Greece these teachers were in favour of teaching about modern, contemporary and inevitably controversial topics.

Marc-Andre Ethier and David Lefrancois are concerned with the vehement opposition of French Canadians to a curriculum which they feel is too accommodating to the role of the English in shaping Québec. The authors argue that the Québec Citizenship curriculum, which aims to be liberal and inclusive, actually ensures that pupils become passive and conformist.

Erkan Yaman and Linda Levstik and her colleagues consider how it may be possible to understand the uniqueness of one's community or culture and also recognise its connectedness with other places and cultures.

Maria Schmidt, in Brazil, found that the pupils she worked with did not develop history thinking skills which might enable them to develop a sense of identity, nor did they develop an understanding of their own identities through personally constructed national or world narratives.

This leads us back to the questions the English Secretary of State for Education appears to be attempting to resolve, in proposing a new history curriculum which will forge a shared national identity for a multicultural society. Is this the role of history? Can this be done through learning the skills of historical enquiry? Can young children learn these skills? And will this approach give them an understanding of 'the big picture?' Is there a 'big picture' or 'multiple small pictures'? If there is a 'big picture', can pupils learn substantive issues and build up 'big pictures' through constructing their own understanding of the past, history, mainly through working on sources? And, if there are multiple, contrasting small pictures that provide temporal, historical orientation, what are they and what is their role in educating pupils?

Erinc Erdal makes the point that the purpose of learning history may depend on the times in which you live. She examines how history was seen in the nineteenth and early twentieth century in Turkey as a tool for constructing national identity and transferring a nationalistic ideology, the 'big picture'.

Contrastingly, Elizabeth Pickles' research found that contemporary English secondary school students' use of sources depended on both disciplinary understandings related to empathy and evidence and to understanding of substantive issues.

And Yosanne Vella's work in Malta provides yet more evidence that young pupils can also learn to work with sources.

However Stuart Foster's and Jonathan Howson's government funded project found that 50% of the 50 14 - 16 year old pupils they worked with had a fragmentary and disconnected knowledge of the past, while the 36% who were able to use disciplinary concepts were limited in their substantive knowledge. This may well be because the current curriculum topics are piecemeal and because the quality of teaching, especially in primary schools, varies.

But it does not suggest that we should abandon all that has been achieved, world-wide, in helping children to understand why history is dynamic and multiperspectival through learning to engage in historical enquiry, 'Doing History' with teacher guidance and support. Such learning develops the substantive body of historical knowledge and concepts that underpin identity and the complex, diffuse and wide ranging set of values, beliefs, aptitudes and orientation that educate for citizenship in plural, tolerant and liberal polities. History is the most civilising of disciplines, to deny pupils its binary, combined qualities of substantive [factual] and syntactic [skills and processes - enquiry] knowledge is to impoverish and endanger children's education. This idea was at the core of the National Curriculum for History in England that the Conservative Government developed from 1989 - 1997. And the dangers of not doing so have been often rehearsed.

# Oscillating Between the Recent Past and the Remote Past: The Perceptions of the Past and the Discipline of History of Secondary School Teachers in Greece

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*Abstract - This article reports part of the results of a large scale, empirical, study of 971 secondary school teachers' perceptions of the past, the discipline of history and history didactics that was conducted in 2004 by the Institute of Pedagogy (Ministry of Education and Religious Affairs) in Greece. The 80 questions in the questionnaire referred to teachers' educational and professional background, their perceptions of the past and history, and their role as teachers of history. This paper discusses only those findings that refer to teachers' stances towards different historical periods. In contrast to previous research conducted in Greece into teachers' attitudes towards the past, it was found that the teachers in this study favoured the teaching of modern and contemporary history rather than only the teaching of Greek Antiquity. Taking into consideration the teachers' overall performance in this survey, as well as in other recent studies, the teachers' endorsement of recent historical periods could be interpreted as their identification with a familiar past (Lowenthal, 1985, p. 39) that is meant to contribute to their understanding of current reality.*

*Keywords - Historical consciousness, Teachers' cognitive stances, Discipline of history.*

## Introduction

History teachers constitute a particularly interesting case in education: Not only do they belong to the broader society but they are also imparting the official version of a country's past to their classes. Teachers, therefore, seem to function as part of their students' sociocultural and, at the same time, educational framework since they bring together the official and unofficial pasts. Any research into teaching practices would therefore be important, no matter what its final purpose may be: Phillips (2002, p. 6) for example sees the purpose of any teacher training programme as focusing on teachers' 'effectiveness' and 'reflexivity' and therefore, researching teachers' practices is important because, in this way, these practices may at some point become more effective, while a really reflexive teacher will be sensitized to research findings and innovations concerning the teaching of their subject.

This particular Greek study into history teaching practices in the Greek Lyceum (Upper High School) is important for at least three reasons: first, the size of its sample, 971 participants; second, the fact that this was only the second large scale study in 11 years, since the 1993 Frangoudakis & Dragonas study of a sample of 910 Primary School teachers serving in Athens; and third, as a result of at least some of its findings. An interesting finding presented by this paper is the fact that, unlike those in 1993, the teachers in this study (which took place in 2004) opted almost unanimously for teaching the recent past, the modern and contemporary historical periods (Apostolidou, Kyrkini & Sakka, 2009: 21)[1], rather than exclusively for teaching Greek Antiquity (The Classical Years). This finding is interesting since Greek Antiquity seems to constitute a synopsis of Greek identity for most of Greek people, at least as far as research into Historiography[2] and educational research in Historical Consciousness in Greece[3] suggests.

Although curricula were revised towards a more constructivist mentality in 1997 and 2002, and history textbooks were also revised in 1997 and 2006, research into teachers' practices (Mavroskoufis, 2009) suggests that a 'transmission model of teaching' (Haeussler, Bohan & Davis 1998, p. 174), and a 'collective memory' (Seixas, 2002, p. 34) approach emphasizing ethnic identity may still be prevailing in Greek history classes. The latter phenomenon is probably connected to the general persistence of Greek society as a whole to use a particular narrative framework of Greek history as reference to the past. There is also an identification of the official national narrative as adopted by the Greek state with the narrative of Greek history in public use by a broad audience. The latter narrative relates the story of the Greek people from the antiquity until modern times, resisting foreign invasions and cultural assimilation (Avdela, 2000, p. 248) and remaining more or less the same. Continuity, superiority and resistance are the main characteristics of the Greek people while, for the Greeks, Antiquity has been a flattering and desirable past in contrast to the inevitably defective present.

According to Oakeshott (1983), this mental attitude could be a 'practical' use of the past in contrast to the less familiar and difficult past that results from historical enquiry. The recent past could be another 'practical' past as it is familiar to its audience, not because it is reminiscent of a particular identity, but because it resembles people's present.

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1. Apostolidou, Kyrkini & Sakka concluded the qualitative analysis and presentation of the data and Ferendinos the statistical work of it.
2. Herzfeld, 1982 and 1987; Gazi, 2000; Kyrtatas, 2000; Liakos, 2001, 2003 and 2007; Kokkinos, 2003 and 2008; Pesmazoglou, 2005; Sykora, 2008.
3. Frangoudakis & Dragonas, 1997; Mavroskoufis, 1999 and 2008; Iliopoulou, 2002; Kokkinos, 2005; Apostolidou, 2006.

### Remote-identity past and recent-practical past are both familiar pasts

The identity past is usually included in a narrative that describes and consolidates a collective identity. In this case, the members of a certain community use their ancestral past as the best version of what could have happened in the past, and they seek to repeat it. Rüsen (2004, p. 122) used the term 'teleological continuity' for the aforementioned attitude. The identity past is therefore a remote past like Greek Antiquity or, as Todorova (2005, p. 7) reminds us, the golden pre-Ottoman period to which most of the Balkan countries refer to, functioning within a revival schema context. Though remote, this identity past is a familiar past because it often relates to people's everyday life or memories, while these memories are selected for reasons of expression and self-understanding. The identity past is also familiar to us because it constitutes a past 'learned from other people' (Elias in Chartier 1997, p. 117); it belongs to the sphere of public history and is the past the state uses to inculcate us in certain ways.

On the other hand, the recent past is by definition familiar, precisely because it is recent and therefore bears 'alleged similarities' to our contemporary life, to our present. It is preserved by people as helping them to make sense of their present and to compose 'a less puzzling or more manageable practical present' (Oakeshott, 1983, p. 16). Oakeshott (1983, p. 15) also calls it a 'recollected or consulted' past because it is stored and used only when present needs call for it. As Lowenthal (1985, p. 39) observes, if we tend to refer to the recent past it is not so much because it is familiar to us, but because it actually renders the present familiar to us, as 'we can perceive only what we are accustomed to'.

On the whole, both the remote-identity past of Greek Antiquity and that of the recent past that resembles the present may be considered, in Oakeshott's terms, 'practical' rather than 'historical' pasts. Consequently in order to assess teachers' performance in the historical periods' questions, one ought to take into consideration the participants' overall performance in the 80 questions of the questionnaire, and especially in those questions which were sensitive in relation to the discipline of history.

## Methodology and Instruments

### Details of the sample

Our sample comprised 971 Senior High School (Lyceum) history teachers; in the school year 2003 - 2004 there were 7,000 history teachers in lyceums. The lyceums to which questionnaires were sent were chosen at random, in an effort to create an analogy between the population of teachers in each prefecture and the number of the lyceums used to represent the same prefecture.

Our sample bears the following characteristics: 73.2% of the participants were women and 79.5%[4] of the sample were between 36 and 55 years old. Only 32.1% had a first degree in history[5], while 92.4% of them had not completed any postgraduate studies. However, 72 participants had a second university degree. In relation to teacher training, 92.4% had attended general[6] teaching training courses and 62.6% teacher training courses concentrating on history didactics.

### Instruments

The questionnaire comprised 80 questions both open and closed which referred to teachers' educational and professional backgrounds, to their perceptions of the past and the discipline of history, and finally to their decision making in the classroom. The open questions did not usually ask for justification of participants' choices, which was a drawback of this questionnaire; instead, participants were asked to name items other[7] than those mentioned by the questionnaire itself.

Nevertheless, even the open-ended questions, when combined with the rest of the open questions, offer an insight to the closed ones. There were also two questions which required participants to produce a longer text: *'Make a general comment about teaching history, especially in the Lyceum';* and *'Do you believe that teaching history would benefit from surveys like this one? Justify your answer'*. This paper includes a presentation and analysis of only those questions that asked participants to attribute significance to different historical periods. There are two open questions and one closed. At the end of the presentation, those questions which refer to the discipline of history will also be briefly presented to give us an insight to the questions referring to the historical periods. SPSS and EXCELL were used for the statistical part of this research, while the interpretation was based on bibliography related to other empirical research in historical consciousness and to Greek history.

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4. More specifically, 47.9% were between 36 and 45 years old, while 31.6% were between 46 and 55 years old.
5. 57% were 'philologists' (specialized either in Classics or in Modern Greek Literature) and 10.9% were graduates from Philosophy, Psychology and Education departments. In Greece, all teachers of the above specializations, including historians, are appointed as philologists in secondary schools where they teach Ancient and Modern Greek, history and philosophy.
6. The general training courses include courses in pedagogy, psychology, etc, as well as in the didactics of all the separate philological lessons, Ancient and Modern Greek and history. They take the form of either initial training or in-service training.
7. In this case the wording of the question is: *'Is there anything else? [that you have to suggest]'*.

## Results related to the selection of historical periods

The first closed question in which participants had to choose among given historical periods to teach is presented below:

*Question 12: Which historical periods would you believe that ought to be taught, no matter what happens, in the Lyceum? (√ next to the period you choose).*

TABLE 1: Question 12 (categories given)

| Historical Period | Times Selected |
|---|---|
| **Contemporary history (20th century)** | **933** |
| **Modern history** | **893** |
| **Classical period** | **567** |
| Byzantine period | 516 |
| Ottoman occupation | 390 |
| Hellenistic Era | 377 |
| Middle Ages | 265 |
| Venetian occupation | 237 |
| Geometric-archaic period | 226 |
| Roman years | 222 |
| Eastern civilizations | 170 |
| Prehistory | 133 |

Exercises in which participants have to select among different historical periods function as exercises in significance and therefore tell us a lot about the broad historical culture of a country, in the sense that they are actually highlighting the motives one has to learn history (Angvic & Borries von, 1997, p. A37). In this survey participants apart from answering closed questions, were also given similar questions in an open mode: question 28, *'Which units do you think are particularly interesting for students?'*[8] and question 30, *'Which units of national and international history do you consider essential to be taught?'* are questions with no named items in their wording, and no given categories. Thus a type of triangulation (Cohen & Manion 2000, p. 113) actually took place since similar questions were asked four times at different points within the questionnaire and in two different ways, closed (question 12), and open (questions 28 and 30). Questions 28 and 30 will be presented below and right:

*Question 28: 'Which units do you think are particularly interesting for students?*

TABLE 2. Question 28 (open question)

| Units Interesting For Students | Times Mentioned |
|---|---|
| **Classical period** | **139** |
| **Modern Greek and world history** | **128** |
| **Contemporary history** | **124** |
| 2nd World War | 112 |
| Asia Minor Disaster | 83 |
| 1st World War | 63 |
| Hellenistic Era | 53 |
| Society and economy of the modern era | 37 |
| Renaissance | 36 |
| Civil War | 32 |
| The issue of the [Asia Minor] refugees | 30 |
| Byzantium | 28 |
| Greek War of Independence (1821) | 24 |
| The Cyprus issue | 18 |

*Question 30: 'Which units of national and international history do you consider essential to be taught?'*

TABLE 3: Question 30 (open question)

| Units Essential To Teach | Times Mentioned |
|---|---|
| Balkan history (Wars) | 295 |
| **Contemporary history** | **225** |
| **Classical period** | **198** |
| **Modern history** | **177** |
| 2nd World War | 147 |
| Cyprus Issue | 124 |
| Greek War of Independence (1821) | 70 |
| French Revolution | 62 |
| Byzantium | 58 |
| Civil War | 56 |
| European enlightenment | 52 |
| 1st World War | 47 |

There is a clear concentration of participants' preferences to modern, contemporary and classical (5th century BC) history. As was noted above, there is nothing contradictory in the participants' performance since predilection for either the remote-cultural or the recent-practical past indicates, in both cases, identification with a familiar manageable past. Additionally, in questions 28 and 30 participants opted for events which were not only relatively recent but also of a traumatic nature, like the Asia Minor Disaster[9], the Civil War (during the years 1944 - 1949) and the Cyprus issue.

The participants' reference to events that are relatively recent and, at the same time, are considered to be nationally traumatic can be assessed in two ways: it is certainly positive that the teachers of the sample chose and suggested sensitive issues to be discussed in the classroom because this attitude may imply an effort to create links for their students with today's world (Husbands *et al.* 2003, p. 72 and p. 118). Greek students had the chance to express themselves in favour of contemporary historical periods in previous studies like 'Youth and History' and that carried out by Kokkinos *et al.* (Frangoudaki & Dragonas in Angvic & Borries von, 1997, p. A304, Kokkinos *et al.* 2005, p. 164 and p. 291). It is also impressive that the 12 year old students of the Kokkinos *et al.* study opted for the history of Greece as the top subject to be taught, immediately followed by the history of the world, unlike most of their teachers. In Levstik's paper 'Articulating the silences' (2000, p. 291 and p. 297) it is again the students who are interested in sensitive issues like the Vietnam War rather than their teachers, who argued that they were not trained to handle diversity in their classrooms. On the whole, the tendency of the participants to concentrate on difficult issues of contemporary history is compatible with their students' interests. The numbers for the 'Asia Minor Disaster', 'Cyprus' and 'Civil War' issues are small in comparison to the more general 'contemporary history' item, but it should be taken into account that the above issues were not suggested to teachers since it was an open question.

On the other hand, the tendency for Greek teachers, teacher candidates and students to opt not only for contemporary historical issues, but also for traumatic ones, has been discussed by history educators and historians and has also been attested by other studies. For example, in an exercise in Kokkinos and Betrou's study where university students were asked to select the most significant events of Greece's modern history, they opted again for the Asia Minor Disaster and the Civil War. Kokkinos and Betrou (2002, p. 201) interpreted this tendency as an indication of a 'negative historical consciousness' that focuses on those traumatic events of Greek history that seem to have consequences for the country's current political situation. Within the same context, one cannot avoid noticing that the other prevailing choice in our sample was Balkan history, which was mentioned 295 times.

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8. The approach in Greek schools is chronological in such a way that teachers would ultimately opt for historical periods, even if they were just asked about 'units'.

9. The term 'Asia Minor Disaster' indicates the surrender of the Greek army in Asia Minor in 1922 after Turkey's defeat in the 1st World War. The Allies (Entente) assigned Greece the temporary military administration of the area, and the Greeks proceeded into inland Asia Minor. In the end, the Greeks were repulsed not only from the interior but also from the coast, and 1,500,000 people were forced to relocate to Greece as refugees.

The Greek Civil War (1944 - 1949) is actually the internalization of the Cold War in Greece; the Greek Civil War resulted in the political persecution of the communists until 1974, a year which marked the end of the dictatorship in Greece. This dictatorship lasted seven years (1967 - 1974) and was ended by the Turkish invasion in Cyprus in 1974, after a coup d' état against the government in Cyprus organized by the junta in Athens.

This choice can to be attributed to Greece's occasionally troubled relations with the rest of the Balkan countries, such as the recent case of the Macedonia issue or to an inclination on the part of the Greeks to remember the wars that almost doubled the land and the population of the country in the early 20th century.

On the whole, it is clear that there is a tendency for the Greek historical consciousness to victimize Greek people, commemorating traumatic events that the Greek people do not seem able to overcome and which are therefore never discussed. In the cases of both the Asia Minor Disaster and the Civil War of the 1940s, there are Greek responsibilities that could be included in a balanced narrative of the two periods but instead there is only a perpetuation of the initial mourning; what Liakos (2007, p. 236) calls an 'excessive type of memory'. The latter memory is actually a repetition of the initial event and not its interpretation or its historization which would find its place in an historical narration.

Nevertheless, the focus here is not exclusively on either modern and contemporary history or on ancient history, but a combination of those two. Antiquity occupies a privileged position within the official and public national Greek narrative since it acted as a way for Greece to enter (Western) Europe (Herzfeld, 1987, p. 53) and simultaneously as the means for Greece to be detached from her Ottoman and Balkan past (Pesmazoglou, 2005, p. 21). Additionally, the 'Europeanization' of Greece in the 19th century took place through the editing and publishing of ancient Greek texts by Korais and other Greek intellectuals who lived in Western Europe at the time (Gazi, 2000, p. 59). Within the Enlightenment context, emphasis was given to education as a prerequisite of political emancipation and this education was based on creating a bridge between ancient and contemporary Greek culture.

Despite the impressive numbers that Antiquity acquired in questions 12, 28 and 30, one cannot ignore the selectivity in relation to the various ancient periods within which the participants of this research functioned. Certain periods of Antiquity, such as the Hellenistic years or the Roman period, had very low numbers; in fact, in the open questions 28 and 30 participants referred exclusively to the Classical period. The national Greek narrative was structured around the Classical period because the latter was also the one favoured by European Philhellenes, historians of Antiquity in Western universities and intellectuals (Kyrtatas, 2000. p. 254). In his article, Kyrtatas claims that Greek Antiquity was perceived by modern Greeks throughout Europe and, for this reason, the modern Greeks were as selective towards Antiquity as were the Europeans. On the other hand, Europeans favoured the Ancient Classical period as opposed to the Archaic period or the Hellenistic years, what we would call 'Late Antiquity'. There is also evidence for the above in the development of neoclassicism as an aesthetic and architectural movement in the 19th century, both in Europe and Greece (Tzivas, 2000, p. 268).

Finally the ambivalent stance of Greeks in relation to Byzantium is also clear from the results: in the open questions 28 and 30, Byzantium was mentioned very few times and this finding is also corroborated by other Greek empirical research (Iliopoulou 2002, p. 222; Kokkinos 2005, p.94; Apostolidou, 2006, pp. 228-229). Byzantium constitutes a part of Greek identity only when participants are asked directly, like in question 12 of this study or in the monuments exercise in Apostolidou, where students chose to preserve the Byzantine church (2006, p. 129).

### Results related to teachers' relationships with the discipline of history

Other questions in the questionnaire form a useful context to interpret teachers' choices of historical periods to teach: for example, question 37 asked participants to justify why they find history difficult to teach; and question 79 asked participants to make a general comment about teaching history in the lyceum .

From the review of the above questions, it appears that the teachers in our sample follow a process in the classroom which is based on teaching certain content and emphasizing certain events. For many of them, historical narratives function as reports of what happened in the past (Lee, 2005, p. 37) and they tend to see history more as information than as a process. 'The past [is in this way] treated as fixed, finished and - by some authority - known' (Lee *et al.*, 1996, p. 61). This attitude can be inferred from certain participants' answers when they were asked to provide justifications, such as in question 37 where, amongst other things, participants mentioned the word 'knowledge' 291 times as a reason for the difficulty of teaching history.

TABLE 4: Question 37:
*'Teaching history is difficult because…' (the knowledge factor)*

| … you need to have: | Times Mentioned |
|---|---|
| **Knowledge** of other disciplines | 19 |
| Broader **knowledge** | 32 |
| General **knowledge** | 68 |
| A good **knowledge** of history in general | 168 |
| A very good memory | 3 |
| Lot of details | 1 |
| **TOTAL** | **291** |

TABLE 5: Question 37:
*'Teaching history is difficult because of…' (all factors)*

| | Times Mentioned |
|---|---|
| Indifferent students | 73 |
| Lack of proper training | 38 |
| The system: lack of infrastructure, bad books, lack of time, exams | 164 |
| You need to have knowledge | 291 |

In question 79, where they had to make a general comment on teaching history in the secondary school, 47 participants tended to concentrate more on the history textbooks and their content than on processes, and asked for changes, complaining that books were incomprehensible to students because of their writing style. A further 130 participants complained about content but not in relation to books: instead they noted that the content prescribed by the curriculum was very wide-reaching and used expressions like: 'Many details demanded', 'We need smaller books'[10], and 'We have to decrease the content to be taught'.

Participants also complained about the 'fragmentary material': In Greece, a chronological approach prevails in teaching history and this could potentially create a kind of framework but, for the sake of the exams, large parts of the content are omitted and in the end students learn extracts by heart. Of course, these extracts make very little sense if the teacher of the class has not spent time in the year creating the appropriate bridges. Additionally, in question 20 which asked teachers to refer to the main problems with the history textbooks, 830 participants referred to types of narration, and only 408 of them to types of sources or types of activities prescribed. In a subsequent question, participants complained either because the narration of certain books was too 'condensed' or too 'elliptic'. On the whole, the participants of this study tended to see the books as having a fixed and final character and not as a means to be used with other things. This attitude reminds us of Wineburg's (2001, pp. 198 - 199) presentation made of a book's assessment conducted by two different teachers: one made suggestions in response to the book's deficiencies, the other saw the book as a bad final product that should be withdrawn for good.

The constructs on the part of the participants of this research are also supported by other empirical studies in Greece, such as that conducted by Kokkinos *et al.*. in Ioannina and Rhodes in 2002, and with a sample of 272 primary school teachers. Kokkinos *et al.* concluded (2005, p. 96) that the 2002 participants had a positivist perception of the discipline of history and that they adopted the 'reflective theory of knowledge', whereas historical narration reflects reality in an objective and unmediated way.

All the above assumptions are additionally confirmed by interpreting the data produced by questions 60 and 62 which refer to exams[11]: Participants claimed that one of the biggest problems in assessing history is the evaluation of questions that refer to sources. At the same time, in their opinion, the success of the university student candidates also depends on the sources. The findings of questions 60 and 62 are also corroborated by the findings of question 37 in which participants claimed that one of the reasons why they find history difficult is the fact that there are 'ambiguities' in history, or that they cannot handle the sources.

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10. All this may be incomprehensible if one does not take into account the fact that in Greece only one history textbook is distributed to schools for each year group, and that it is obligatory for this book to be used by everyone. Greece is considered to have a centralized educational system. Centralization is apparent both in the type of curricula and in history textbooks. The national curriculum in Greece is issued by the Institute of Pedagogy (Institute of Education/Παιδαγωγικό Ινστιτούτο) which has a 'political character and this is the reason why its leadership usually changes after every governmental change' (Avdela, 1998: 17, Frangos, 2002: 61).

11. Question 60: *'What are the main problems in the assessment of history?'* Question 62: *'What does success in history exams depend on?'*

TABLE 6: Question 37:

*'Teaching history is difficult because…' (the discipline/sources factor)*

|  | Times Mentioned |
|---|---|
| Historical knowledge is peculiar | 01 |
| There are ambiguities in history | 01 |
| It is difficult to teach history in an objective way | 02 |
| History is difficult to understand | 18 |
| Not trained to handle the sources | 74 |

Findings related to ambiguities in history can also be found in the Haeussler, Bohan & Davis study (1998, p.185), which comments on the difficulties student teachers have in dealing with the multiperspectivity of different sources when they attempt to construct their own historical narrative: both in the Haeussler Bohan & Davis study and this one, participants did not see multiperspectivity as enriching history, but only as a problem. In 2008, Mavroskoufis also found that his sample of 127 secondary school philologists only made restricted use of historical sources in the classroom, which actually meant they were covering the needs of exams (Mavroskoufis, 2009, p. 10).

## Discussion

The types of past selected by the participants in this study - the recent past of the modern and contemporary periods of history with an emphasis on traumatic events, and the remote-identity past which indicates the origin of the modern Greek nation - are both considered to be 'practical' rather than 'historical' pasts since they address current political problems and problems of identification and self-understanding.

The remote past is usually considered to be 'historical' because as it requires a disposition to learn about situations different from ours, thus an ability to enquire, it is more demanding to understand. Lee (2005, p. 36) suggests that many everyday ideas are 'often closely linked to a very recent past', while Rüsen (2005, p. 132) states that 'only if memory goes beyond the limits of the lifespan of the person or group concerned should one speak of historical memory'. Nevertheless, a remote past is not necessarily a historical remote past either: There is also the mythical remote past which serves present needs, usually those of collective identification, and consequently constitutes a practical past.

On the other hand, educators support the idea of local and regional history within the context of which students become familiar with items of a usually recent past, thus they are introduced to historical thinking from an environment which is more concrete (Angvic & Borries von, 1997, p. A 85). Within the same context other educators (Levstik & Barton, 1996, Nakou, 2005: 6) also emphasized the advantage of material culture in developing students' historical thinking. Material culture is connected to students' everyday lives and therefore students are helped in making comparisons between past and present. Finally, Ata discusses the use of analogies in the pedagogy of history (2009, p. 8) since drawing analogies between the past and the present implies comparisons between unfamiliar items of the past and more familiar items of the present. In the end - and although a type of 'anachoresis', withdrawal from immediate experience, is needed to activate historical thinking (Ankersmit, 2002, p. 81) - we cannot ignore the fact that understanding the past is a kind of refamiliarization with it (Liakos, 2007, p. 229).

On the whole, the fact that the participants mainly referred to teaching contemporary history and that they seemed to prefer the recent past, or alternatively their identity past, is not in itself an indication that they are not familiar with historical thinking. As suggested above, both the remote and the recent past can be used in historical and non-historical ways. In other words, it is the type of questioning or thinking that differentiates historical from non-historical thinking rather than the type of the past itself. The type of historical thinking which the participants of our study expressed was not a professional one: participants lacked awareness of the interpretative character of the discipline of history, seeing the multiperspectivity of the sources as a threat and the past itself as a fixed entity. This attitude also reflects the fixed, centralized nature of the educational system in Greece and the lack of proper training in teaching history.

## Conclusion

The 971 secondary school teachers of our sample, unlike participants of previous empirical studies in Greece, were found to make use of a recent past, wishing to teach contemporary history rather than the country's official history which is identified with the remote past of Classical Antiquity. Teachers' overall performance in the study and their belief in a fixed past, along with their uneasiness with multiperspectivity, suggest that their choice of contemporary history functions like another familiar past, alternative to their identity past.

## Correspondence

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# Some Student Teachers' Conceptions of Creativity in Primary School History

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*Abstract - Beliefs about the relationship between history and creativity influence how the subject is taught. This study used phenomenographic analysis to identify some pre-service teachers' conceptions of creativity in elementary history lessons (49 postgraduate students on a course leading to qualified teacher status). While student conceptions are consistent with some general and specific views about creativity in the history classroom, most were found to equate more with creativity in or to history, than creative thinking about history. Furthermore, although students recognised creativity as worthwhile and of value, assessing creativity in history was problematic and a number of significant obstacles to employing creative approaches to history teaching and learning have been identified. Recommendations are made relating to how pre-service teachers can be encouraged to understand and apply such approaches to the classroom.*

*Keywords - Creativity, primary, history, teacher education, PGCE.*

## Introduction

Creativity has been described in various ways but common to most is the view that creativity is successful personal activity intent on producing an appropriate new idea or object (Eysenck, 1996; Mayer, 1999). Thus, NACCCE (1999, item 29) describe it as, 'Imaginative activity fashioned so as to produce outcomes that are both original and of value'. Schools have been seen as ignoring, even stifling, creativity (Fisher, 1990; Craft, 2002; Garner, 2007). That creativity should be a concern of schools is evident in the UK's National Curriculum and Primary National Strategy which sought to promote creativity across the curriculum (DfEE/QCA, 1999; Craft, 2002; DfES, 2004). Views about the educational value of creativity stem from its potential to contribute to personal effectiveness, independent action, autonomy, culture and the economy (NACCCE, 1999; QCA/DfEE, 1999; NACCCE 1999; Craft, 2002). Creative expression has also been seen to improve behaviour, social skills, self-esteem, motivation and achievement in classrooms (QCA, 2003, 2005; Ofsted, 2006). Unsurprisingly, primary teachers are urged to foster creativity and problem solving skills (Craft, 2002; DfES, 2003; SEED, 2006)

*History as a creative subject and the role of imagination*
Marwick insists that history is:

> the bodies of knowledge about the past produced by historians applying the rigorous methods of professional history, and deploying secondary sources in the analysis and interpretation of primary sources... History is about finding things out, and solving problems, rather than about spinning narratives or telling stories... historians do not "construct" or "reconstruct" the past... it is knowledge (open to discussion and debate…) about the past... **(Marwick, 2001, 28 - 29).**

This does not seem to leave a lot of room for creativity in history, other than in, say, the process of problem solving. Others, however, see history as the construction of a contested past, more or less subjectively created by the historian, albeit subject to constraints of the available evidence (Guynn, 2006, 107 - 108). Hayden White makes it clearer in asserting that, 'No history... mirrors all or even the greater part of events or scenes of which it purports to be an account... Even written history is a product of the processes of condensation, displacement, symbolization, and qualification' (quoted in Pearson, 2001, 219). History as a narrative construction of the past has been stressed by, for instance, David Starkey (2005) who insists that, 'What matters is narrative; what matters is characterisation... History, fundamentally, is a branch of storytelling.' Indeed, White (Munslow, 1997) sees history as 'story-shaped', the act of imposing a particular narrative or emplotment such as romance or tragedy on past events. Hopkins, writing about ancient Rome, stresses the role and importance of imagination in the construction of the past:

> History is, or should be, a subtle combination of empathetic imagination and critical analysis. This history plays on several irreconcilable tensions. What was it like to be there? We don't and cannot know. And yet surely empathetic imagination should play its part... We have to imagine what Romans... thought, felt, experienced, believed... But we read ancient sources with modern minds... [We know] that other writers, and readers, are very likely to disagree... So why then don't we incorporate this empathetic wonder, knowledge, pseudo-objective analysis, ignorance, competing assumptions and disagreements into the text of the book? **(Hopkins, 1999, 2 - 3).**

From such viewpoints, history in the primary classroom has the potential to be a creative process in which children can participate by using informed, 'constrained' imagination to construct narratives and accounts of events and situations. As Hopkins implies, history cannot directly relay the thoughts and feelings of the lived experience of people in the past, certainly for the remote past, as these are seldom communicated by the evidence. When we provide the opportunity in the history classroom, the imaginative act fills in the gaps in the historical record to make events personally meaningful. A parallel, to some extent, is the production of the historical film which offers a plausible blend of historical evidence and imaginative invention. This blend enables a re-experiencing of the past which, critically, also offers an opportunity to 're-think' the past (Burgoyne, 2008). Such an act is entirely consistent with the educational aim of helping children recognise 'that the past is represented and interpreted in different ways, and to give reasons for this.' (DfEE/QCA, 1999, 17)

*Creativity in primary school history*
Given that history is an interpretive, constructive discipline which draws upon imagination constrained by evidence about the past (Arnold, 2000) then as such it can be considered as a creative activity. Creativity is at the heart of the historical endeavour and some argue persuasively that children should be novice historians from the outset (Fines & Nichol, 1997), although Mortimer (2008) would insist that children are best described as engaging in 'historical activity' rather than as 'historians'. Fines and Nichol have compiled a sizeable evidence base attesting to the efficacy of initiating primary pupils into the process of 'doing history'. The emphasis is on children engaging in authentic historical activity from which they construct their own 'histories' or stories of the past. This, they stress, is not to say that all stories are equally valid or that such stories constitute fiction; rather it is that young children's histories must be rooted in the historical record. This process requires children's imagination and creative thought, shaped by their lived experience.

Besides the construction of something 'new' or original, creativity also involves the creation of associative links especially through inference. Quoting Koestler, Turner-Bisset (2005) sees creative thought as the constructing of a link between two frames of reference, discourses, contexts or codes of behaviour which have hitherto remained unconnected. This 'bisociative thinking' can fashion tentative explanations or understandings in the classroom:

> The creative act is not an act of creation in the sense of the Old Testament. It does not create something out of nothing: it uncovers, selects, re-shuffles, combines and synthesises already existing facts, ideas, faculties, skills **(Koestler, in Turner-Bisset, 2005:14).**

Indeed, Cooper (1995) and Bage (2000) argue that most young children are capable of reconstructing the past from evidence, making unusual, imaginative connections, tolerating ambiguity and engaging in 'possibility thinking'.

## The Problem

Sadly, an understanding of elementary history teaching as transmitting uncontested truths - the outcomes of the disciplinary process - is still widespread (Turner-Bisset, 2005). Many teachers may have had little exposure to the syntactic structures of history, the disciplinary process through which an explanation or narrative is constructed. This could shape their beliefs about history and how they teach it and so makes primary student teachers' conceptions of history and, in particular, school history in relation to their understandings about creativity, important.

This study therefore aims to identify some pre-service teachers' conceptions regarding the nature and function of creativity in the elementary history classroom and what such conceptions might reveal about how the relationship between history and creativity is understood. We also asked if they perceived any significant obstacles which would discourage such an approach. Finally, we consider the implications of these conceptions and perceptions for history teaching and teacher education.

## Method

*The collection and processing of beliefs about historical creativity in the classroom*
To elicit and categorize the student-teachers' conceptions of creativity in the history classroom, Marton's method of phenomographic analysis was used (Marton, 1981) and applied by Newton and Newton (2009a; 2009b) to explore conceptions in primary science. This generally involves face-to-face interviews with between 12 and 20 people but here, as a preliminary step, eighty students (a complete cohort) were asked to complete an anonymous questionnaire about the object, namely, creativity in primary school history (see Appendix). 49 replied and their responses provided a preliminary data set of beliefs about this object (the 31 who did not reply representing a similar profile range to those who did). Of these, a representative sample (in relation to gender, educational background, teaching experience) of 12 students was interviewed individually to explore their beliefs further. The interviews lasted between 20 and 30 minutes. The students then had a school placement where they taught and observed history lessons, amongst other teaching. After, they were re-interviewed in two groups of 6.

These group interviews lasted between 45 and 50 minutes and, as in the questionnaire and individual interviews:

- Elicited specific instances of history lessons observed or taught believed to provide opportunities for children to be creative in history;
- Clarified what children did which students considered was creative;
- Asked what the students considered to be worthy of high (and low) marks for creative behaviours in these lessons.

They also:

- Asked to what extent the taught component about enquiry in teaching history had influenced their views and practices regarding creativity in history;
- Perceived obstacles to creative approaches to history in the primary school.

Responses to the questionnaire and in the interviews (all of which were recorded and transcribed) which described what the students saw as opportunities for historical creativity were transcribed to form a data pool. For example, the pool included: *'Writing as someone else, seeing things from another perspective… All the children would come up with different explanations…'* and *'Children could attempt to build small scale models [of Roman aqueducts] to tackle the issue of channelling water uphill'*. The items in this pool were sorted into groups according to similarities in the kind of creativity the students described. This was done jointly by two of the authors and was an iterative process: as the sorting progressed and new groups appeared, earlier groups were re-considered and, if appropriate, items re-allocated so that self-consistent, mutually exclusive groups emerged. Following Marton's practice, each group was given a descriptive label, an account of its attributes and one or two examples to form a 'category of description'. Of course, the categories identified may not be all that exist: there could be more but, in practice, this is not an obstacle to learning something useful and informing discussion about these students' conceptions of historical creativity in the primary classroom.

## The Sample

The data came from students on a 1 year Postgraduate Certificate of Education course leading to a qualification to teach 5 to 11 year old children in England. Before the course, each had completed a first degree from the wide range of those offered in UK universities. The majority (33 of the 49) had not studied history beyond the age of 16 years. 9 had pursued some aspect of history to the age of 18 years. 6 had a history degree. The course included instruction in the teaching of all the subjects of the English primary school and included generic instruction on lesson planning and teaching. No specific instruction on the fostering of creativity in the classroom was provided before completing the questionnaire and the first interviews. Before completing the questionnaire, the students had a primary school placement where they had observed, planned and taught lessons but not history. After this, there was instruction on using historical enquiry in the classroom in preparation for the next teaching practice when the students were expected to teach history, amongst other subjects. The group interviews followed this practice.

## Results

We present the findings first in broad terms and then we describe 6 categories of conceptions held by these student teachers. Students' thoughts on how to assess and foster creativity in history, the opportunities for creative activity afforded by various aspects of history and perceived obstacles to adopting creative approaches to history in school conclude the account.

*Some background beliefs about creativity and history in relation to other subjects in the primary school curriculum*
Of the 49 questionnaires, only 6 expressed the view that History as a school curriculum subject involves little creativity. Far more felt this to be true of Mathematics (36), Science (14), R.E. (15) and Geography (13). On the other hand, most believed that English (28), Drama (39), Music (32), Art (41) and Design & Technology (29) offered more opportunities for creative thought than History. Less strongly structured subjects (14) resting less on facts and with 'no right or wrong answers' (12) were seen as offering more opportunity for individual thought, self-expression, interpretation, imagination and originality (27). These 'more-creative' subjects were also felt to be more open than History to a cross-curricular (2) and/or practical, 'hands-on' approach (11). Subjects offering fewer opportunities for creative thought than History were regarded as more rigidly structured, firmly rooted in factual knowledge (38) and with few opportunities for using imagination (10), cross-curricular or practical approaches (3). As a group then, these students appear to share the general conceptions of creativity in attaching it largely to humanities and the arts.

*Beliefs about creativity in primary school history*
For many students (54), opportunities for historical creativity could be recognised by the presence of drama/role play, creative writing, or 'hands-on' practical tasks involving problem-solving or making activities. Such history lessons were seen as a vehicle for creative writing or for enabling a cross curricular approach to learning (15).

For others, the opportunity for imagination stemmed from historical reflection, consideration, interpretation, debate, imagining, analysing or employing independent thought (25) and from empathy with those living in the past, or to make the past accessible or promote 'ownership' of it (12). For a few (7), it was the opportunity these imaginative and practical elements gave children to interpret events in their own way ('putting their own slant on things'). The individual interviews explored a number of these responses. In particular, creativity was seen as important because it motivated children and involved them directly and personally, it made children think, it provided an opportunity for discussion permitting children to come up with their own ideas or interpretation, and it allowed the children themselves to generate questions. One student described her experience of using role-play with children in the context of assessing insurance claims following the 1906 San Francisco earthquake. The task was to determine from photographic evidence the legitimacy of claims and to deliver the decision to the often shocked and distraught survivors. The student felt that, 'It was in their [the children's] hands, they picked the photos - child-led learning which is creative in its own way'. In another topic, a student recounted how, 'We took them on a journey as if they were going to the beach 50 years ago... so we had a little Punch and Judy show set up and things they would have seen in those days and we got an old lady to come in dressed in clothes from those days and she talked to the children about what it was like when she was younger.' For these students, creative thought in history lessons was more than just learning about the past using documentary evidence, it was also about re-creating or re-experiencing the 'lived' past and, in effect, 'becoming' that historical person.

### Categories of conceptions about creativity in the primary history classroom
Amongst this variety was a significant degree of consistency in the beliefs held by the students.
6 categories of conception were identified.

### Category 1 - Creative historical thought is a means of envisioning of the past.
Creativity in a history lesson means children using their imagination in drama, role-play, or creative writing about past events or situations to enable children to re-live them and make them personally meaningful. The aim is for the children to have a feeling or empathetic understanding of what it was like living in those times. For example:

- 'The chance for role-play using what they know to become a Victorian... a chance to put themselves in the place of a Victorian child. Use their imagination and thoughts and feelings.'

### Category 2 - Creative historical thought is a means of constrained envisioning of the past.
Creativity in history lessons means children engaging with the evidence made available to them by the teacher and using their imagination to generate descriptive and explanatory understandings of events and situations. These understandings are constrained by the need to consider plausibility. For example:

- '[Children should] explain why, what they had said, done, made connections to what they know about the history and can give reasons for their choices.'
- 'History should enable children to say, *"This is my view and I can support it."*'

### Category 3 - Creative historical thought is about using making activities so that past events or situations become more concrete, meaningful and memorable.
Creativity in a history lesson is about designing, making and testing solutions to practical problems which, in the process, help to explain past events or situations and stimulate interest. For example:

- 'Children could attempt to build small scale models [of Roman aqueducts] to tackle the issue of channelling water uphill.'
- 'The children are taught about Viking ships and then must design and make their own... [It] offers a chance to get away from text books and get children to learn by doing.'

### Category 4 - Children's creative thinking in history is a means of generating interest or positive feelings about history are aroused by the lesson
Creativity in a history lesson is a means of engaging children in a topic through stimulated interest and positive feeling. This can be a desirable associate of another intention, as when role play or model making is used to enhance understanding. For example:

- '[Children who show] enthusiasm and willingness to participate in role-plays etc. Go that extra mile - further research.'

### Category 5 - Creative historical thought is about drawing on other areas of the curriculum to understand past events and situations.
Creativity in a history lesson is about using other subjects, such as Drama, English and Art, in order to make past events and situations more meaningful. For instance:

- 'History lessons are creative when they are embedded within Science or Art.'

### Category 6 - Creative historical thought is about making sense of past events and situations
Creativity in a history lesson means children constructing their own explanatory understandings of past events and situations. As a result, the children are better able to raise or answer historical questions or construct an argument about which version of events or situation is more plausible. For example,

- 'Writing as someone else, seeing things from another perspective... All the children would come up with different explanations...'
- 'The children could play historical characters with a different view point and the children could be asked to convince the other children that their view is right.'

### Assessing creative thought
Only one of the students interviewed admitted that the assessment of creativity was problematic; the majority confidently put forward a number of suggestions for how creativity might be assessed. In the questionnaire responses, 16 students said they would give more marks if there was evidence of 'higher' understanding, of interpretation, explanation, the ability to justify a response or judgement or the capacity to apply their knowledge. A smaller proportion of students opted for 'thinking outside the box' (9), empathy (7) or motivation and effort made to engage with the topic (7). Low marks would be for limited engagement and effort, 'careless work' (22), or regurgitation of 'facts' (15). Such views were re-iterated in the interviews but one student provided an example of what it meant to 'think outside the box', using the example of reconstructing the harsh life of a Victorian factory girl. In this context, low marks for creative thinking would be awarded to those who could give only a factual description of the girl's life in the factory, but high marks would go to those able to explain why she was trapped in that particular life and situation. For all the students, creative thinking in history meant more than just factual recall. While it could mean constructing explanations, it could also include motivation and feeling.

### Encouraging creative thought
Many students (14) believed encouraging creative thought in history was *difficult* (Q19 & 20). The reasons they gave were varied and included their own negative memories of 'Gradgrind' history lessons centred on the acquisition of factual knowledge and fact-based worksheets (11), problems associated with time or resources (1), or that the past itself does not lend itself to a creative approach because it is too abstract or because 'it's hard to be interested in something that doesn't exist' [sic] (2). However, more students (18) believed creative thought in history was easy. These cited positive experiences in school (1), a fascinating subject with lots of scope to recreate the past (3), a wide range of topics which lend themselves to, for instance, drama, art, simulations, cross-curricular work, writing, making posters, and field visits (10), opportunities to use imagination (3) and because there was 'no single answer' (1). The remaining students (13) felt unable to say if encouraging creative thought in history was easy or hard. During the group interviews (after the students had taught some history), the view was expressed that a decisive factor in determining whether children were exposed to a creative approach in history was the *teacher*. It was felt that the teacher's personal interest, subject knowledge, receptivity to creative approaches to history, whether they viewed history as given facts or as a search for explanation and understanding, and how well they supported the creative thinking of their pupils was crucial.

### The perceived opportunities for creativity in various historical topics
Questionnaire data also revealed that many students saw more opportunities for creativity in some topics than in others. The Maya, Aztec and Indus Valley civilisations of which they had the least knowledge were regarded as having the least potential for creativity. Topics described as having more creative potential were those seen as offering scope for cross-curricular or a 'hands-on' practical approach, the possibility of field visits and, as with the Romans or Egyptians, were sufficiently remote from the present to lend themselves more easily to a creative approach through Art or Drama. Interestingly, the Local Study was regarded as having a low potential for a creative approach because it was perceived by some to be 'mundane', 'boring' or too recent to be interesting.

### Obstacles to creativity in history in school
Interview data exposed what the students saw as obstacles to creative approaches to history in the primary classroom. Prior to their long school placement where they were required to teach history, students saw time as the key issue, both in relation to an inflexible timetable and through the priority teachers must afford to English and Mathematics.

This left little opportunity for developing creative approaches in history lessons. Other reasons offered were that such approaches might not 'tick all the boxes' for the school in relation to the assessment of the student teacher's lesson:

**Rosey:** *'Lesson objectives. They tie you.'*

**Gordon:** *'Especially when you're training and you're being assessed... especially since you are assessed on whether your outcome has met the objective. If you let kids be creative and go off where they want to go, they [the person assessing you] comes back and says, "No! These are [not] your learning objectives". Then you get a rubbish report... so you can't do it.'*

More than one student referred to the norms of practice in a school: some schools favour creative approaches, others do not. One student described how the school permitted him to develop creative activities - making shields and swords to explore Roman tactics in battle - to which another student responded, 'You're lucky to be able to do that sort of stuff. With me it was always, "no, you'll have to stop because you're not sticking to your learning objective" or "sticking to your lesson plan." ' These points were made again after the long school placement and others were added, such as, teacher and school expectations that students would produce 'proper work' and a lack of personal confidence in trying an approach seen has having the potential to make children's behaviour more difficult to manage. Nevertheless, the students were now more inclined to be critical about such obstacles. When one mentioned a lack of resources as an obstacle, another student argued that this was merely an excuse to avoid creative approaches, masking 'a limitation within themselves'. Echoing this point, a fellow student, Sophie, believed that teachers can adopt a creative approach to any subject with status and time allocated to it in the curriculum, 'It's the opposite for history, so teachers don't bother... [But] you can make the time though if you are fussed [sic]'.

## Discussion

Six categories of conception were identified: In the first, creativity was thought to be the means by which children can access the past in order to gain an empathetic understanding of how people lived and why they did the things they did; drama or role-play allow us to experience what they experienced, in effect to 'become' them. Rather than as L.P. Hartley observed, the 'Past is a foreign country' (quoted by Lowenthal, 1985, xvi), here the past is knowable and recoverable, and people living in the past just like 'us'. The second category highlights the view that to imagine the past children must draw on the historical information (and evidence) made available to them by the teacher. In this sense, their imagination in visioning the past or in constructing their own interpretation of it is constrained. The end product must have plausibility, that is be consistent with the evidence or information and be justifiable within the limits and terms allowed by that evidence and information. The third category shows an interest in pursuing facts, suggesting that to re-experience or interpret the past requires a necessary but relevant factual basis. This is quite a different rationale to the non-creative approach to history with its' exclusive focus on a factual content knowledge as the end product rather than as the means to resolving 'historical questions'. The fourth category sees creativity in the engineering of shared and positive feelings about the topic in history. This may conflate or confuse the creative act with its possible *effect* such as stimulating attention, generating interest and excitement, or encourage the children to want to find out or know more. Whilst enjoyment of a historical topic can act as an 'enquiring and critical force' according to Mortimer (2008, 457), a lesson which generates emotions is not necessarily one which stimulates creativity as Barrow & Woods (1975) observed some time ago in relation to Science. It may also confuse a teacher's creativity with that of the children. Both of these would be misconceptions. The fifth category proposes that for children to think creatively in history it is necessary for them to employ approaches and insights using a 'generic tool box' made up from for example, Drama, English, Art and Design Technology. A cross-curricular approach was thus regarded as a mechanism which could 'reveal' the past to children and enable them to resolve problems in our understanding of the past as in how Roman aqueducts 'worked', or how the Pyramids were constructed. In the sixth category, creativity permits children to make sense of, and explain the past; and here the students came closest to the notion that history as a discipline which allows for the different explanations and interpretations. The children's own 'slant' or interpretation may not provide original historical accounts or be acceptable to the community of historians, but the child's interpretation provides an explanation which may be *new to them*. In both these categories, the use of imagination to construct a mental image to experience or interrogate the past is central to creative thought in the history classroom.

While there may be others categories, these were generated by 49 students who teacher educators may recognise amongst their own would-be teachers. They are like many others who want to be primary school teachers. For instance, most had not studied history after the age of 16 years, other than as a part of their teacher education course. Accordingly, the results may usefully relate to other pre-service teachers and inform thought about educating teachers to teach elementary history (for a discussion of the 'relatability' as opposed to the 'generalisability' of research findings, see Bassey, 2001). Taken together, the beliefs suggest three different perspectives or orientations concerning how the relationship between creativity and history is understood. Each perspective reflects particular notions about desired outcomes and the History curriculum, and about how the relationship between the past and history is understood.

The first perspective might be described as *Creativity in History*. Here, history was seen as a curriculum subject much like any other, to be judged on the basis of its potential as a *vehicle* to promote creativity as an end in itself. Outcomes in this perspective are concerned with the creative product or act rather than with an understanding of the past. The second perspective might be described as *Creative Approaches to History*. Here, generic creative approaches from English, Drama, Art and Design Technology are used to *deliver* the history curriculum. It views the past and history as, essentially, the same. Outcomes show concern for the transmission of a relatively known and agreed past consistent with the goals of the National Curriculum: chronological understanding, knowledge and understanding of events, people and change; historical interpretation and the skills of enquiry (DfEE/QCA, 1999). Enquiry is seen *ultimately* as a means of generating explanations largely in line with reaching a pre-defined, shared or agreed understanding of events and people. The third perspective might be called *Creative Thinking about History*. Here, the past and history are different; history is a construction of an essentially unknowable or contested truth about events and personalities in the past, so no single account constructed by historians can ever be final. That different interpretations are possible, so long as they are plausible and accord with the available evidence, provides the conceptual basis for exploring the past. Outcomes focus on the children constructing a credible account, original to themselves, which they are able to justify. Enquiry is seen as important more as a *process* than as a means to reaching a pre-defined, shared or agreed understanding of events and people.

These perspectives are not mutually exclusive and many students held multiple perspectives, although one could be dominant. A number of students (15) appeared to prioritise history as a *vehicle* for creativity. Perhaps this may reflect a particular interpretation of initiatives which promoted creativity through a cross-curricular approach to the primary curriculum (DfEE/QCA, 1999; Craft, 2002; DfES, 2004). But, most (32) students saw history lessons as more than this; they provided opportunities for children to gain a better understanding of the past by acting as 'novice historians' (Fines & Nichol, 1997) through enquiry. Few students however, appeared to conceptualise the link between creativity and history as being creative thinking *about* history. It is tempting to think that this is what the 7 students meant when they claimed that creativity involved the opportunity for children to give their own 'slant' or interpretation, or when one student observed that creativity involved, 'The ability to represent "Ancient" Rome in the eyes of a modern person and not losing sight of its "Ancient" nature.' However, none of the students interviewed made reference to history itself as a *construction* offering the possibility of different interpretations, but only to the possibility for children to give a *personal* view. Rather, the interviews confirmed the view that the dominant perspective held by most students related to creative approaches *to* history. These students wanted the children to develop a meaningful understanding of the past, to personally identify with people in the past and understand why they lived or behaved the way they did. Collectively, the students saw creativity almost exclusively in relation to teaching and learning about a 'fixed' or 'closed', relatively unproblematic, past that is both known and knowable. Based, in the main, on such a perspective, teaching history then becomes the process of delivering uncontested truths about the past revealed by historians. According to Turner-Bisset (2005), creative approaches have tended to foster such a view in primary schools.

As already noted, the students on the whole felt confident that they could assess creativity in history, however this gave rise to two issues. The first was whether the students themselves were sufficiently differentiating between the assessment of creative thinking in history *per se*, or the quality of the effects it produced, such as enhanced motivation. As we have seen, the interviews did identify the view that for some the presence or absence of creative thought could be determined by its effects (here the motivation or involvement of the children). The second issue related to those students (16) who said that it was possible to evaluate creative thinking in history according to the extent that it produced a greater level of understanding based on interpretation, explanation, ability to justify a response/judgement or evidence of originality, 'thinking outside the box.' However, the students were uncertain when asked what would count as a higher level of explanatory understanding or interpretation.

What did emerge strongly from the students was that, although creativity was seen as worthwhile and should be encouraged, there are a number of perceived obstacles which *dis*couraged a creative approach to history in the classroom. These included the status of the subject in relation to 'core' subjects like English and Mathematics which dictated the time and attention given to planning and classroom delivery, an unsupportive school culture and significantly, a 'lukewarm', or even resistant, attitude amongst some teachers.

The students recognised that creative thought in history helps children make mental connections to construct both a descriptive and explanatory understanding about the past, and can provide the opportunity for children to put forward their own view or interpretation, producing something new, at least to themselves. It is clear that the work students had undertaken on historical enquiry as part of their pre-service course had influenced their views about creative thinking in the history classroom. As we have seen, the students were mostly inclined to see the link between creativity and history in terms of creative approaches *to* history, one that recognises the importance of creativity as a strategy for supporting children's understanding of the past. However, where the enquiry approach proved less successful was in influencing their views regarding creative thinking *about* history; their responses in most cases appear to have remained based on a conception which saw the past as unproblematic, closed and relatively uncontested, something that could be delivered using a creative approach. Potentially this could impact on the value of creativity as 'productive thought' which fosters critical thinking about the past. Furthermore, most students found themselves unprepared for the obstacles they might encounter when it came to implementing creative approaches to history in those schools where history was seen as a low status subject.

## Conclusion

Creativity does not always receive much attention in teacher education in the UK (Davies *et al.*, 2004) or elsewhere (Diakidoy & Kanari, 1999). In the context of history teaching, teacher educators should check for both narrow conceptions and misconceptions of creativity. In particular, they should be sensitive to conceptions which make creativity in history only a descriptive or fact-finding, technological problem solving, emotion enhancing event, an opportunity for creativity *per se*, or manufacturing activity. Whilst they had some thoughts about assessing creativity, these students found it difficult to be specific about what counts as 'poor', 'moderate' and 'good' creativity when speculating about descriptions, explanations and investigations, and this may need to be clarified. The need for teacher educators to model creative thinking *about* history as well as creative approaches *to* history seems a worthwhile consideration to help students to discriminate between them. Such modelling could help to problematise student teachers' assumptions about the status of historical knowledge and the process of historical knowledge creation. Finally this study has shown that students can require guidance on how to address the obstacles which they believed discouraged them from adopting creative approaches in school to a subject which has become increasingly marginalised, and even endangered ('Why it's essential for British children to know about 1066 and all that', Roberts, 2005; *History in the balance*, Ofsted, 2007).

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1. **Do you think of History as a creative subject?** Yes/No/Sometimes/Don't know

2. **Which subjects offer *more* opportunities for creative thought than History?**
   English Drama MFL Maths RE Science Geography Music Art PE ICT D&T Other

3. **What makes these have more opportunities?**

4. **Which subjects offer *fewer* opportunities for creative thought than History?**
   English Drama MFL Maths RE Science Geography Music Art PE ICT D&T Other

5. **Why do these have fewer opportunities?**

6. **Give me an example of a History lesson which involves creativity?**
   (Topic and description with enough detail for me to understand what the children would do)

7. **Which was the creative part?**

8. **What was creative about it?**

9. **Which topic would you like to teach or enjoy teaching in History?**
   **Suppose you taught this topic. Are there opportunities for historical creativity in it?**

10. **If so, what are they?**

11. **Please state what is creative about them.**

12. **If you wanted to give more marks to someone who showed creativity in the topic you chose in 9 above, what would you give the highest marks for?**

13. **What would you give the lowest or no marks for?**

14. **What would you look for as evidence of creative thought in the topic you chose?**

15. **Here is a list of National Curriculum topics in History. Which of them do you see as offering the best opportunities for historical creativity?** (Put them in order from 1 (best) to 12 (worst))

    A Local Study l Roman Britain l Anglo-Saxon Britain l Vikings l Britain since 1930 l Ancient Greece l Ancient Egypt l Ancient Sumer l Assyrian Empire l Indus Valley civilisation l The Maya l The Aztecs

17. **Looking at your list, what makes 'number 1' the best?**

18. **What makes 'number 12' the worst?**

19. **Do you think that encouraging creative thought in History is easy or hard?**

20. **Why do you think this?**

21. **Do you see problem solving as being related to creativity?**

22. **If so, in what way?**

23. **Please give me an example of a problem which children might solve in History?**

24. **What would be the creative part of the problem?**

25. **Is there anything you want to add about creativity in History? Have I missed something out?**

26. **About yourself:**
    Do you have a History A-level (or equivalent)?                    Yes / No
    Do you have a History degree (or a degree or degree equivalent with a significant History component)   Yes / No

# Contemporary English Interpretations of Traditional Russian Folk Tales

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## Folk Tales as Oral History

*Abstract* - Oral transmission of cultural values, beliefs and attitudes to children occurs mainly through story, often in the form of folk tales. Oral history in many societies was [and can still be] the only form of history. Oral history through story encodes moral, social, political, religious and cultural understanding - values, beliefs, concepts, attitudes and behaviours. As such it provides 'models' that influence the development of personal, familial and social identity. Russia is one society where folk tales have played a major role for all classes, particularly within the contexts of family and local community.

This paper, through case-study research, explores how three groups of English children respectively aged 7 - 8, 8 - 9 and 9 - 10 responded to three traditional Russian folk tales. The children were told the stories and then represented their cultural messages and what they had learnt from them in their own interpretations of the tales. The children presented their ideas to their peers. Analysis of pupil responses revealed that they were able to assimilate the moral messages within their own cultural contexts: the two older groups [8 - 9, 9 - 10 ] within their own imaginatively created stories. Our tentative conclusions are that the youngest children [7 - 8], possibly for coincidental reasons, related the story very much to their personal experience. And it was interesting that the youngest group created a story which was kinder, more optimistic and insightful than the original. Third, families were at the heart of all the stories and what children most feared losing was their home and family and that this is what is most precious to all of them. Fourth their wishes were surprisingly non-materialistic.

*Keywords* - Attitudes, beliefs, behaviours, case study, Citizenship Education, cultural transmission, folk tales, identity, moral education, oracy, oral history, primary, Russia, Russian history, story, story telling, values.

## Introduction

Folk tales orally transmit cultural values and tell us about people in the past, their daily lives, hopes, fears and conflicts. Young children are comfortable learning through stories. They broaden their experience and their knowledge of other times and places. Stories affect children's intellectual growth for they do not listen passively; they are called upon to create new worlds through powers of imagination. Holdaway (1979) described how stories enable children to escape from the bonds of the present into the past, and to explore emotion, intention, behaviour and human purpose. Children are offered new dimensions of imagination and powerful, perennial ideas, which they could not discover for themselves. They represent models of our world, which we constantly carry in our minds, and which allow us to constantly redefine our vision of the world.

Until recently the only history in many societies was oral history and, in some cultures, the oral tradition has remained alive to the present day. The oral tradition perpetuates stories of a people's past, beliefs values and social customs. Because oral history is constructed around these key concepts it is possible to compare shared values, in contrasting contexts, across times and places.

Such stories help children to examine the relationship between fantasy and reality, to look for causes of events and reasons for behaviour in essentially the same ways as the historian finds out about the past.

## Particular Significance of Russian Folk Tales in Finding Out About The Past

### Tales of everyday life

The 16th century word 'skazka', from 'skazat', to tell, means legend. Telling traditional tales in traditional settings was an important performance in Russia. They were narratives based on observed fact. Whether they were myth or reality was not an issue to the peasant in pre-revolutionary Russia; they were believed to be true. The category 'bytovye skazki' are tales of everyday life. There may be a fantastic element but these tales are rooted in this world and in time. They are colourful stories about husbands and wives, stepmothers and step daughters, neighbours, lovers, those who act out of fear, envy, hatred, jealousy or any other common human failings. They are concerned with such themes as greed, laziness, dishonesty, bad luck, played out in a stratified society, with wealth and poverty and with societal values - good, evil, respect (e.g. Marozko), greed (e.g. The Golden Fish), with meaning what you say (e.g. The Language of the Birds). Without exception they reflect social conditions and mores (Haney, 1999:109) Social commentary is implicit in the tales. Often there is no real villain, just a stubborn wife, a profligate wife, a lazy wife, just one person who is stronger than the others.

### Tales about all classes of people

In Russia the folk tale is particularly important in telling us about the lives of Russian people of all classes, because there was no secular literature until the seventeenth century (Jakobson, in Afanas'ev, 1975:632). Therefore the oral tale permeated society at all levels. Laymen from Tsars' courts and boyars down to the lowest ranks relied on oral creation and transmission. This Russian folk lore, with which all classes were familiar, left an indelible stamp. The original, highly artistic fiction of the Russian laity could only be transmitted orally. It conveys the vitality deeply rooted in Russian life. It was Lenin who said that if one examines the Russian folk tales from a sociological point of view we could write, from this beautiful material about the hopes and longings of our people.

### Tales of life over a long period of time

Oral history over centuries had time to root itself deep in Russian life. As early as the twelfth century Russian sources refer to a rich man who, suffering from sleeplessness, ordered his attendants to tickle the soles of his feet with a feather, to strum on the gusli and to tell him fairy tales. Ivan the Terrible, who became one of the most popular heroes of the Russian folk tale, had 3 blind men at his bedside telling fairy tales to put him to sleep (Jakobson in Afanas'ev, 1975:635). Oral folk tales influenced nineteenth century Russian literature. Aristocratic literature in the drawing room often contained folk lore traits and folk lore did not vanish from the households of gentlefolk for a very long time. Even at the end of the 18th century there were blind story tellers in the homes of the gentry. Leo Tolstoy, as a child, fell asleep to the tales of an old man the Count's grandfather had brought in because of his knowledge of folk tales. Pushkin found these stories fascinating. 'Each one,' he said, 'is a poem'.

Just before the Russian Revolution a group of fieldworkers explored villages one or two hours by train from Moscow and found folktales in abundance in a neighbourhood of mills and factories. The tales continued among rich and poor, young and old. In remote areas such as Siberia and the Baltic Republics and Turkik areas of the former USSR hunters, traders and fishermen continue to be skilful tellers of folk tales which are still being avidly collected.

### Characteristics of Russian folk tales

About a third of the plots of Russian folk tales are not known in the west. Where they are distinctly different it is because of the influences of ancient Turkik nomadic peoples who bequeathed many names and attributes found in Russian tales. Yet there are also remarkable similarities many Russian tales and Indo European folk lore. This may be the result of psychological similarities between peoples or because tales were 'borrowed (Khidiakov, 1964:13).

According to Boris Sokolov (1929 - 30) the Russian folk tale fulfils the role of a social utopia; it is a dream compensation for reality. The philosopher Evgeniy Trubetzkoy (1932) tried to define the longings which underpin Russian folk tales, the dreams of another better realm.

## The Case Study

### Aims

A previous case study analysed the ways in which a class of English children were able to interpret the values embedded in a Turkish folk tale into contemporary contexts familiar to them, as an example of universal values underpinning individual differences. (Cooper & Ditchburn, 2008). A developmental pattern was suggested but this seemed to interact with children's ability to replicate a complex narrative rather than their ability to understand the moral and translate it into a modern context. Therefore in this study 3 different age groups within the same class were given stories at 3 levels of narrative complexity. The aim was to see whether the children were able to identify the moral of their traditional Russian story, which encapsulates values shared and understood across a large section Russian society over a long period and to translate it into a contemporary context.

This reflects both the current emphasis in the National Curriculum for England (DfEE,1999: 10 - 11) on the aim to promote pupils' 'spiritual, moral social and cultural development' through personal moral and social education which should permeated the whole curriculum and also the current interest in international and global curricula based on common values developed through different content. It also explores recent work deconstructing folk tales and exploring their perennial psychological concerns (e.g. Warner, 1994 ).

The stories were:

- **7 - 8 year olds: Morozko**. Moral: If you are kind to people they will be kind to you.
- **8 - 9 year olds: The Golden Fish**. Moral: If you are greedy you may end up with nothing
- **9 - 10 year olds: The Language of the Birds**. Moral: If you say that if your wish is granted you will give up something important, you may live to regret it.

## Method

The researcher worked with the oldest group and the class teacher with the middle group, in the classroom. The youngest group worked with the teaching assistant in another room to avoid distraction. Both rooms were blacked out. Lighted candles were put on each group's table. The children entered their room in silence through a 'magic arch' made by two pupils and sat at their table. The 'story tellers' were signified by the encompassing Russian - type shawls they wore. The scene was created that the children were no longer in Cumbria; it was no longer the 20th century. They were sitting in a wooden Russian House in the middle of a great dark forest. It was Winter.

The story tellers each began with a distancing phrase such as 'Deep in the heart of Mother Russia, many years ago', and signified the end with a traditional Russian conclusion, 'And now my friends, I'd like a drink of Vodka please. The stories were told not read with maximum expression and drama, howling of wind, downpours of snow, thundering and lightening as required, embroidering with detail. The 'story tellers' were amazed at the rapt and magical atmosphere they had created, which they compared very favourably with the usual literacy lesson.

After break the blackout was removed and children were asked to write their own interpretations of their story. They were given differentiated levels of support in order to allow them to reach their maximum potential. The youngest group wrote a collaborative story; the Teaching Assistant questioned, cued and scribed for them.

She was amazed at the way in which children who, she said, never contributed in a whole-class lesson were totally involved in making and discussing suggestions. The middle group worked in pairs. The oldest group wrote individual stories. At the end of the morning the room was again lit by candles, children took it in turns to wear a story-teller's shawl and took it in turns to tell, rather than read their stories. They chose to continue well into the lunch hour.

## Analyses

### Settings

As shown in FIGURE 1 (p. 28) two of the interpretations were set in 'big mansions', one mansion was in America, as was the 'Pizzahut'. Three were set in exotic locations, one in Japan and two in Africa. Two were in non specific places 'in England', and the other locations characterised not by a country but by 'the sea' or 'a wood'. This was a surprise because the interpretations of the Turkish Tale had all been firmly rooted in children's direct experiences. Some children are not moving out of the fantasy context. Others seem to be influenced by places perhaps seen on television.

### Characters

There seems to be some identification with the characters the children created. For example, the youngest group who listened to the story of Morozko, about a wicked stepmother created a 'dark-haired, bearded man, his 12 year old daughter, and Kerry, who lives on his Estate and marries him, who has a 10 year old son Zak. In this group, The middle group, who had listened to The Golden Fish, about an old fisherman and his wife, nevertheless wrote stories about brothers, sisters and parents. The oldest group had heard a story about a son and his parents and most of them wrote about children and their parents, the exception being 'Meeky, who lives with his girlfriend and has a distant brother - a common, though less conventional situation.

### Translation of the moral into contemporary settings: Morozko

The children identified the moral as 'If you are kind to people and show them respect they will be kind to you'. FIGURE 2.1 (p. 28) shows how they were well able to understand difficulties in relationships with a stepmother from a child's perspective, based, in most cases, on their own experiences. And it is interesting that, rather than have a nasty stepmother and her child their interpretation demonstrates a more sensitive and thoughtful understanding. The stepmother is understanding and supportive while the child in their story is both good and bad, with clear understanding of why. Eventually the child overcomes the 'bad side' through the stepmother's kindness and greater understanding and the family's able to 'move on.' This a far more subtle version than the original story.

### Translation of the moral into contemporary settings: The Golden Fish

The middle group who listened to The Golden Fish each of the stories is clearly modelled on, and closely mirrors the original story. It seems surprising that, in our materialistic age neither the parents nor the children ask for contemporary luxuries or power. But maybe it is because these children are not very poor, as the fisherman and his wife were, that they have no excessive material wishes. Interestingly it is, in each case, the parents who overstep the mark but even their wishes are the same as those from fairy tales, to become King and Queen, to own a castle, to rule the world.

*Translation of the moral into contemporary settings: The Language of the Birds*

The oldest group defined the moral, which they all translated into their version, as, 'If you say that if your wish is granted you will give up something important, you may live to regret it'. They also had wishes which were fanciful rather than materialistic. (FIGURE 2.3, p. 30). The merchant wanted to know the language of the birds so maybe that accounts for the number of children who wished to be animals. Only Meeky's story is 'reality fiction'. And in every case the loss was of home or a friend parents or a sibling.

Most of the children concluded by modelling, 'And now my friends, I'd like a glass of vodka', with a request for, lemonade, diet coke 'with two ice cubes', a chocolate milk shake or something similar.

## Conclusion

First, all the children were able to interpret the moral of their story into another context, suggesting that the values it represented are widely understood across time and places. Second it was interesting that most of the two older groups created another imaginative tale rather than a realistic story related to their own experiences.

The oldest group were able to include plentiful imaginative detail. The youngest children, possibly for coincidental reasons, related the story very much to their personal experience. And it was interesting that the youngest group created a story which was kinder, more optimistic and insightful than the original. Third, families were at the heart of all the stories and what children most feared losing was their home and family and that this is what is most precious to all of them. Fourth their wishes were surprisingly non-materialistic.

Overall the children revealed an encouraging set of values, which made the original folk tales appear rather crude. Is this evidence that some things are better now than in the past?

FIGURE 1: Settings in Contemporary Interpretations

| Russian Story: Original Setting | Age Group | Setting in Contemporary Interpretations |
|---|---|---|
| Morozko: Winter - a woodcutter's house in the middle of a frozen forest | 7 - 8 year olds | A mansion in America |
| The Golden Fish | 8 - 9 year olds | A jungle in Japan<br>Africa<br>A wood<br>A cottage in a wood |
| The Language of the Birds | 9 - 10 year olds | A big mansion in the country of England<br>The country of England some time in the second millenium<br>The sea<br>A Pizza Hut by the coast in America<br>A lane in England in the year 2000<br>Woodcutter's house in a snowy forest |

FIGURE 2.1: Translation of Moral into a New Setting: Morozko

| Traditional Tale | Group Interpretation |
|---|---|
| A woodcutter, whose first wife died, lives with his second wife, her daughter and his daughter, in a forest. The stepmother wants to get rid of her stepdaughter. She sends her into the forest in the snow and freezing cold. Morozko, Jack Frost, asks her if she is cold but she does not complain. He rewards her with warm clothes and eventually jewels.<br><br>When her father is sent by her stepmother to collect the frozen body he finds his daughter and her jewels. The stepmother then sends her daughter into the frozen forest in the hope of a similar gift but the girl complains bitterly so Jack Frost does not protect her.<br><br>When her stepfather returns he finds her, dead. | Suzy's mother died when she was six.<br><br>As she got older she began to look like her mother and her father began to hate her. He prefers her step brother, Zak, because he is good at sports.<br><br>Kerry tries to talk to Suzy about her mum but Suzy slams the bedroom door. She watches a happy family on television and cries herself to sleep. She dreams about when she was four and playing with her mum and dad. She wakes up screaming for her mum. Kerry comes and sooths her.<br><br>Suzy realizes that Kerry is giving her the gift of love and strength. She realises that she can give this to anyone she loves and cares for. The four of them start going out together as a happy family. |

FIGURE 2.2: Translation of Moral into a New Setting: The Golden Fish

| Traditional Tale | Group Interpretation |
|---|---|
| A poor fisherman's wife complains she needs a new pail.<br><br>He catches a golden fish. The fish gives him a wish in return for being put back into the sea. He wishes for a new pail for his wife.<br><br>His wife is never satisfied and her demands become increasingly extravagant. Eventually she wishes to be Queen of the Sea. All the things she has wished for disappear and she is back in the poor fisherman's hut. | 1. A 'magic man like an old grandfather' grants increasingly greedy wishes of a girl's parents. Eventually they lose everything.<br><br>2. A boy gets lost in the jungle on a school trip. He meets a 'magic man', who gives him 10 wishes. The old man tells him to lose his last wish to go home but he doesn't. So the 'magic man' vanishes and the boy stays in the jungle for ever.<br><br>3. Family camping in Africa meet a monkey. They look after him when he is sick because the forests are disappearing. The girl wishes for a pony and the boy for 'a massive drum kit'. The parents ask where they came from and are told they were given by the monkey, who is a magic monkey. The parents ask for a castle. Everything disappears.<br><br>4. Lucy is asked to get some wood. She meets a man who gives her wood and money. Lucy's parents meet him. He gives them food, money and jewels. 'People are swarming and jostling' to get to their house. Then the parents decided they had the power to become King and Queen and said to Lucy,' Spread the word'. When the man heard this their power disappeared. They realised that it was the man who had the power, not them, because he was the King.<br><br>5. Jack meets a man who exchanges firewood for Jack's axe. Jack's father is horrified. So they run out of meat. The man brings them rabbits and deer. They have so much food they think they can rule the world. Then everything disappears. |

## Folk Tales

*Morozko* http://russian-crafts.com/tales/morozko.html
*The Golden Fish* http://russian-crafts.com/tales/gold_fish.html
*The Language of the Birds* http://russian-crafts.com/tales/language-birds.html

FIGURE 2.3: Translation of Moral into a New Setting: The Language of the Birds

| Traditional Tale | Group Interpretation |
|---|---|
| A rich merchant lived with his wife and his son, Ivan. While they were having dinner the canary was singing. The merchant said that he would give anything to know what the bird was saying. | 1. John said that if he could have a flying pig that could talk he'd give up living in a house. A pig flies past the window and says, 'I am yours to command'. John flies off on his back. But the pig could not find its way home and, 'As far as I know they are flying still'. |
| Later Ivan was hunting in the forest when a great storm blew up. He sheltered under a tree. When he looked up he saw a nest with 4 very young birds in it. He put his Kaftan over the nest to protect them. After the storm a big bird flew up to Ivan and said that in return for protecting the nest he would grant him a wish. Ivan said he would like to understand the language of the birds. | 2. William 'is fascinated by dolphins'. He meets a 'weirdly dressed man' and tells him, 'If I could become a dolphin I would give up my parents'. He turns into a dolphin and can never go home again. |
| That evening the canary was singing at dinner. Ivan told his parents it was a very sad song. It sang that one day Ivan would be a prince and his parents would be his servants. The parents were worried. They drugged Ivan and pushed him out to sea in a boat. | 3. A girl called Lola has a 'constant urge to fly'. She would give up all her friends if she could fly. She grows fairy wings and flies out of the window and goes to see her best friend Sophie but Sophie looks straight past her as if she isn't there. |
| Ivan was rescued by a passing ship. Some cranes came past and warned of an approaching storm. The sailors did not believe Ivan. The ship was badly damaged. | 4. Jack says that he would give up for ever being a human being if he could breathe under water. He turns into a shark and so can never come out of the sea again. |
| Next a white swan warned of pirates. They put into harbour and escaped. In the town Ivan heard of a king in afar away land who was plagued by crows. The king said he would marry his beautiful daughter to any man who could rid him of the crows but if he was not successful he would hang him. | 5. A similar tale of Bob who turns into a fish and never sees his parents again.

6. Meeky (Pizza Hut owner and partner of Bethany) would give away his older brother if he could make the pefect pizza. His brother drugs him and pushes him out to sea. When Meeky returns with the receipt for the perfect pizza he finds his brother has married Bethany and owns his Pizza Hut. He kills them both. |
| Ivan travelled to the land and asked the crows what was the matter. They said that they did not know whether the baby crow should follow the mother or the father, Ivan told them the father and the crows disappeared. So Ivan married the princess. Eventually his parents arrived, penniless, and he took them on as servants. | 7. Jessica who would do anything for her friend Anna, said 'I'd give my life to shine like the sun. Anna makes this happen, and sees her friend rising into the sky like the sun. Anna evaporates in the heat. |

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# Citizenship, History and the Enquiring Mind: Innovations Using Drama Methodology

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*Abstract - This paper attempts to explore some hopefully new terrain on the edges of the firm landscape of current established cross curricular ties between history, citizenship and drama. The intention is to raise questions about and possibly chart, tentatively, a few directions in the inculcation of moral sense and social justice: mapping ethical understanding and a consideration of virtue from the perspective of observers on the fringe. The starting point: the view from this outpost is one of a pluralist, largely secular and materialist society hell-bent on a strangely apathetic self destruction. Can historical learning and teaching impact upon shredded moral fibres? Could citizenship, employing awareness of good and bad societies and individuals - elements of historical (factual?) context - create good citizens or (maybe better still) students who are value-enhanced and are able to think morally. I do not propose to offer historical exemplars/villains on conventional citizenship themes- legal rights, responsibilities, social diversity, political/criminal systems (not to be confused), social change, financial/consumer issues, media, Europe and globalisation - rather I hope to raise radical approaches to these and other social and moral dilemmas through the theoretical description of and an outline praxis of a dialectic drama.*

*Given suitable topic selection for which history or citizenship practitioners have 'a feel', drama techniques embodying a thesis-anti thesis-synthesis structure are able, I shall claim, to draw out 'felt virtues' and imbue participants with personal moral engagement (an analytically sound definition of politics articulated by G.A.Cohen, 'If You're an Egalitarian, How Come You're So Rich?' (Edinburgh University Gifford Lectures 1996). Extending key notions of dramatic impetus found in Brecht and Boal, drama can bring to life both paradoxes e.g. good/bad, universal/ethnocentrism or particularism and a democratic process, search for solutions and resolutions, and locate students in a moral discourse. In a rapidly changing socio-cultural landscape drama provides a space for construction and deconstruction of identities/genders/universal themes, micro-societal dilemmas. Ideally the right techniques at the right time, e.g. on local issues, can sustain commitment and motivation in young people used to swift feedback and gratification. From citizenship themes and historical contexts, events and imaginative projects, even protests, can be created, effecting experiences of real participatory democracy and (hopefully even!) real change. Drama raises the possibility and potential of changes in individual attitudes and choices - the very cornerstone of bringing about equality and social justice.*

*Keywords - Beliefs, citizenship, debate, drama, empathy, ethics, history education, school history, identity, memory, morality, norms, pedagogy, society, values, social justice.*

### Introduction

Whilst still in the process of fully embracing the ideals of non-materialism and non-violence embodied in the principles of such faiths and belief systems as Buddhism, Humanism and the Quaker community it is surprising that 'traditional' values are constantly applied to current social, moral and political issues. In an age of immediate gratification and virtually instantaneous communications we witness exponentially widening schisms of varying sorts: global, national (and micro-societal), economic, cultural and religious divisions. In the post-industrial west (and other 'first countries') acquisition of cheaper goods and commodities takes on an apocalyptic fervour aided by online technology and loyalty card fans. The medium is the message and the virtual message? Watch the screen (stay off the streets); if you have to, join a gym; most especially join the converted, the fellowship of affordable consumption (buy in, chuck out) and obsolescence, or lose out.

When we attempt to move with the speed of technology: is it irrelevant to ask if looking toward past events, traditional movements and 'tried and tested' solutions can inform notions of citizenship. Ancient wisdom may not always be wise, nor sometimes more useful than generality; but let us at least attempt to regain a sensibility whereby the journey is measured by distance and not merely speed (time), a journey through non-virtual terrain capable of surprise and spectacle.

### Culture, Identity and the Past

Just as environmentalists who protect flora and fauna that have a necessary function in the grand scheme of things (but no market price) question the putative benefits to our communities of fossil fuel energy - shouldn't we simply try to use less - so some contemporary philosophical positions argue that our present metaphorical infrastructures simply do not work. Equally many sociologists are similarly concerned about the prevalence of a download a zeitgeist culture in which a tick the box-wear the T-shirt approach is pivotal in life style choices. Individuals interact more and more via a screen, identities formed by single issue groups.

Considering and studying the past shows us that there are options among which we are free to choose, not simply social continuities to which we must adapt. Through drama we can affirm some values which we revere in the past; through creativity our power to create meanings and values anew is revealed, and it is in the individuals' capacity to use it well. Perhaps (I suggest) this is what citizenship is about.

## The Role of Drama

Within education however, old concepts and practices, harnessed in pedagogic application from the status quo, tend to be neutral (or worse) and thereby fail to face up to the imperatives of a new social dynamic. Can drama deliver more than a re-affirmation of common fellow feeling? Could drama, underpinned by historical understanding and contextualised by fin de siècle/dawn of an era movements or even alternative social structures, enliven and make fresh and radical citizenship in the twenty first century?

Some new and reworked starting points to consider:

1. Progression within citizenship rests on principles of equality and freedom. Freedom *from* oppression, freedom *to* express oneself in a creative fashion; being a (good) citizen relates to respect for the dignity of others and to aim to preserve that dignity through the elimination of all causes of contempt whether financial, racial, sexual, ideological.

2. Social (thereby individual) change involves transitions from one set of concepts to another. Such development is often brought about by non-rational means - felt experiences resting not simply on an analysis of past events (though setting the scene promotes accuracy through good historical inference and deduction in a taught drama session). Relating empathetically to past transitions and recreating characters and situations can be at best an acting out of a 'true' social present - a 'here and now' scaffolded on the past. Reflection may emerge from a physical, rhythmic involvement. Passive (screen based) learning is at least to some extent by-passed.

3. In demystifying social, political and economic processes views and values are weighed and examined and re-examined on all sides, avoiding initially where possible, the dominant viewpoint and perspective of the 'generals of culture'. It amounts to an inclusive programme able to question what one takes to be natural. Independent citizens, autonomous and heuristically able to question and shift perceptions, can also tap into a universal process: sensing the points at which the world as perceived and the modes of representation of its deeper structures change and reform in harmony.

4. The whole of human culture ought to be open and available as a resource for drama and citizenship, in particular remote cultures considered as primitive or bizarre. As with ideologies, other ways of living have been denigrated. There are lessons to be learnt from bias and prejudice. Colonising and proselytising perspectives may be examined; their impact, as recorded anthropologically, assessed. Belief systems of 'the fervent other' should be discussed: are their moral values created rather than discovered? How far do adherents act in a moral life with a consideration for others, a moral life that is not a matter of following rules?

In the introduction it is claimed that paradoxes are not only accepted but also explored by a contemporary drama paradigm and its associated dialectic methodology. In practice, for example, the 'fervent other' with an in-role strong belief system can be hot seated next to an 'impartial observer' with a disinterested yet critical take on the former's espousals. Taking the above four introductory theoretical standpoints and deliberately conflating them one central and crucial paradox emerges. Societies of the post industrial western world have an embedded nostalgia that accepts that the values which they destroy are those that they cherish. Social norms rest on a dishonest bifurcation: many values based on social, sexual, racial and economic divisions are questioned; status quo remains, divisions reform intact. It is nostalgia that has many anomalous attitudes similarly paradoxical under this general umbrella.

Short-term memory loss relating to political events of the past applies to, e.g. aspiring to celebrity status, trusting financial institutions, taking up arms against a seemingly common enemy. To be disabused of this nostalgia or sentimentality is to shake off all preformed social shells and ties. It is to become aware in a heightened fashion of other people's suffering and the causes of their states; a process similar to overcoming forms of political innocence. As far as citizenship's underpinning idea this awareness could be said to be the key instancing of a healthy communal human condition. It is required for political and social conscience, and it entails impulse for change. Society looks the worse off with sentimental compassion. Losing nostalgia means this is regarded as not enough: production and consumption will have to accommodate a non exploitation ideal with personal commitment leading to its realisation.

## Society's Values

As a nation we affirm values such as thrift, good economic housekeeping and productive lifestyle, as a society a disappointing realisation of these holds sway. As a group we realise you get what you pay for but the reality is ultra cheap labour forces continually kick started in underdeveloped countries.

Economically, putative virtues related to corporately controlled growth and consumption are those for the sake of which present practices and expansion/exploitation continue; at the same time new markets and labour forces promote scarcity and hardship. CCTV, security cameras, even (as America) private security guards belie free speech and the 'freedom' of towns and cities. Public space for social mingling is diminishing, suburbia sprawls. Urbanity, an 'elusive combination of density, public life, cosmopolitan mixing and free expression' (Walker, 1995) is becoming confined to car-free plazas. What early Christians saw as immoral - street theatres and fairs, open gardens and taverns outside 'consecrated' homes and churches - could now be seen as indicators of the health of our human ecosystem 'It is extremely regrettable and demoralizing that robbers and the elite agree on just one thing - living in hiding' (Kierkegaard, 1944). George Orwell's description of the transformation of Barcelona at the beginning of the Spanish civil war will inspire a reaction (Orwell, 1952). A regenerated society celebrates its unification on the streets.

Again, a paradox with more than two sides to explore: unwittingly society subscribes to the notion of segregation (the nostalgia of the golden age of class) boosted by gated villages and expensive bunkers. Scale and texture of landscape and our time in it have changed. 'Journeys' are from private interior to private interior. Time saving technologies have changed expectations rather than created more (free) time. As with the car, we are moving at the faster speed of the machine.

Our bodies have a status similar to our pets - we work them out rather than using them for work. Treadmills, originally powering grain crushing machines in prison (and useful for dealing with incarcerated vagrants in America), keep us fit in an era marked by the disappearance of unstructured time and space. Muscles, like fake tans have a place only in an aesthetic of the obsolete. As oil runs out and the climate heats up, concentration upon non-motorised alternatives is perhaps relevant for the future, but more fundamental as part of a re-think of time, space and how we view our own bodies. This universal-particular axis can be played out in global-local terms. Corporate globalised initiatives impact on the local in ways mentioned above. (Globalisation in terms of texted responses did get forty thousand people of all nationalities on the streets of Seattle in 1999 to protest/shut down the World Trade Organisation meeting however).

## Drama through Citizenship

Can drama through citizenship mount a rearguard action, sketch a blueprint even, against rising war, political corruption and judicial miscarriages and digital distractions encouraging obesity in every day life which is in other ways becoming increasingly disembodied? Well, yes: obviously Boal (1979) encapsulates collective resistance through first and foremost an analysis of oneself and a 'correct' positioning of that awareness. Hence the 'we' in the above discussion. 'It is not a matter of struggling for others, which suggests paternalism... but... becoming aware of oneself as not completely fulfilled and as living in an alienated society... One can identify radically... with those who bear the brunt of oppression'(Gutiérrez, 1974.) Boal's invisible forum and image theatre offer techniques. But questioning and debate through working out complex paradoxes can avoid a rather black and white clichéd rhetoric of social struggle and 'politics of the oppressed'. Brecht's *Lehrstück* is ideal for playing with the roles of 'fervent others'- a form of delivery for whole piece workings. The concept also highlights the specificy of the historical movement e.g. where judicial miscarriage is completely revealed in stark (theatrical and metaphorical) light. It is also about why we do not see the covering over of wrongs.

Dialectic drama methodology encourages pre-requisite self-liberation by exploring such dilemmas and paradoxes in interesting ways and tying it down to a 'what would you do if you were x in this position?' (given context and an important, in an ethical sense, move from 'ought' to 'is'). 'Sides' can be made up of those who 'play argue' for a sustainable environmentally aware approach where we need to think less of ourselves and more of nature as a whole to avoid ecological disaster; of those acting out consumer led lifestyles of lottery winners arguing for fun and free will to do just as they please. In the above situation, one of many, the individual paradoxes present us with a thesis (what seems to be/is the case), an antithesis (what is/seems to be the case) and various moral routes depending on desired consequences and outcomes. Critically, the structure itself drives the debate to possible and useful syntheses e.g. the current trend to 're-localisation' as a potential solution to travel, food miles, energy conservation, centralised political control problems. For development in the case of chains of ideas that can sustain it, the synthesis representing some quasi concrete version becomes the thesis, this new concept generating its own negation; each progressive cycle tested on the strength of the synthesis. Each situation presented in dramatic form in school, workshop, or in the parks/open spaces provides social impact and criteria by which pieces can be judged to be worth doing. Does it work? If so why and when (and in what situations) would it not?

Within such airing of paradoxes moral questioning concerning welfare, justice and freedom are naturally raised. Both participants and spectators can enter into the dialectic (in a Boal-Brecht fashion). Historical contexts and events save the self expression involved in the thesis and antithesis from becoming solely subjective and internalised. Although symbolism can enhance awareness and moments of significance stressed, Strinbergian introspection on issues worked on is avoided. The historical settings of war, for instance, provide the material from which criteria relevant to debate on pacifism can be gleaned. Participatory democracy during the representation stages ensures that all can have a say on national and individual defence, invasion, the notion of world policing armies.

As suggested, internalisation alone is insufficient: living through problems in the working out of this schema means active democratic involvement based on a gleaning of objective criteria from what has happened (what will happen predicated on what is happening). Social issues, values and moral dilemmas are able to be presented with both an 'abstract objectivity' and the free expression of 'the fervent other' because more than one side has been examined. If citizenship and drama act together then suffering and injustice cannot merely be portrayed and understood but situated in art and life.

## Conclusion

By bringing to life, for example, causes of homelessness, landlessness, imprisonment, enslavement we explore artistic freedom by living those moments of recognition in social space; and we are in the act of uniting inner and outer worlds of experience placing the notion of responsibility at the centre. I contend that programmes written out of the dialectical exploration of societal paradoxes open up social and political structures, offering personal options in pursuing choices and change. Ideological structures can limit our daily lives. By exposing them and meeting the challenge of self-liberation by creating our own theories and freeing artistic imagination, moral concern is enacted. As G.A. Cohen argued in his last book: If the whole structure of society were organised like a physically demanding and exciting camping trip full of camaraderie market forces would not apply. Even anti-egalitarians would drop the ethos and all would use their strengths and abilities for the benefit of all (according to their needs). Also, as Cohen states, life would be more fun. We have to live in hope!

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## Vignette and Commentary

University students perform a silent drama in Exeter city high street. The city council agreed to stop all traffic through the high street while this presentation took place. The students walked in two long lines from either end of the street, silently and slowly to the beat of a drum - each student carrying a pair of women's shoes - each pair a symbol for a woman who had been killed in the SW area in the previous year. Two women are killed every week in domestic violence.

The walk was organised collaboratively by women's aid groups, university departments (drama and education) and the police who have to deal with difficult and violent domestic situations. The shoes were lovingly placed in a crescent formation in a central shopping square of the city for everyone to see.

The crowd who watched did not disturb the 'performance' but asked attending police offers to explain the meaning - which they were briefed to do and did sympathetically. Once the shoes were placed, another group of students played the John William's *'Theme from Shindler's List'* as the assembled group stood in silence. This form of street presentation uses drama to highlight an important community issue, not a word was spoken.

The shoes were left in place on the street for the rest of the day. Many attended the presentation in memory of their dead friends.

# Establishing Criteria for Instructional Multimedia Design, the Lessons from Scottish History

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*Abstract - The role of Information and Communication Technologies (ICT) in school education has become a contested area with both its theory and practice increasingly questioned. Teachers thread their way through the conflicting arguments of advocates and sceptics in an attempt to satisfy expectations which move beyond the classroom into claimed benefits for society at large. Unrealistic expectations have raised false hopes with many policy makers now using terms such as 'power' or 'potential' to transform when referring to ICT in schools. However, the experience of designing, developing and evaluating multimedia resources relating to Scottish History demonstrates that it is possible criteria for instructional multimedia to enhance learning. Technology helps students learn in ways which would be difficult in more conventional formats, but it is the underlying pedagogy which enhances teaching and learning. This pedagogy employs varied learning tasks built around multiple intelligences and authentic learning to develop knowledge, understanding and skills of enquiry. Nonetheless, the use of ICT does not negate traditional forms of teaching and learning. The context for this study is Scotland and its history, but the conclusions reached have a much wider application in the debates over ICT in schools.*

*Keywords - CD-ROMs, Cuban, evidence - historical, historical thinking, historical learning, ICT - Information and Communications Technology, investigation, multi-media, problem based learning, Scotland, Scottish history*

## Introduction

The role of Information and Communication Technologies (ICT) provides a contemporary and revealing insight into the formation and execution of education policy and, according to Cuban (2001), the perils of a top down model of implementation. Few other relatively recent developments have attracted such diverse claims, many of which often appear far removed from the concerns of classroom teachers. Arguments that ICT will reduce social inequalities (Light, 2001) sit perhaps uncomfortably beside teacher questions such as, are the machines and software reliable (Cuban, 2001)? The scale of claim and counter-claim ranges from the lofty to the everyday, but the failure of policy makers and administrators comprehensively to address everyday concerns alongside unrealistic expectations has reduced the potential of ICT to enhance teaching and learning.

Surveys of ICT use in schools paint a varied picture. ICT usage in Mathematics and Science remains generally low and highly variable across countries (Law, Pelgrum and Plomp, 2008). Despite considerable potential to enhance history education by, for example, providing access to data and primary sources (Spaeth and Cameron, 2000; Milson and Downey, 2001: Lee & Clarke, 2004; Levesque, 2006), reports by The Office of Standards in Education for Schools in England (2004, p.4) concluded that, "it was rare to find pupils' learning enhanced by their use of computers, or of systematic use in schools to underpin pupils' progress". By way of contrast, an evaluation of the 1:1 laptop initiative in New Hampshire demonstrated widespread benefits including increases in the use of ICT across all subject areas, participation by students, motivation and the ability to work independently (Bebell, 2008; Zucker, 2008). Nevertheless, it has provided difficult to measure the impact of ICT on improving educational performance and test scores since "isolating the effects of changing technology is difficult if not impossible outside of a laboratory setting" (Light, 2001, p.715). In a survey of ICT in Scottish Schools, Her Majesty's Inspectorate of Education (2007) reported that there was no evidence of increased attainment in formal qualifications or against nationally defined levels that could be directly linked to the use of ICT in teaching and learning. Yet in 1993, Lehrer demonstrated that one class who designed a hypermedia presentation on the American Civil War possessed deeper knowledge, enhanced skills together with a better appreciation of the work of a historian one year after completing the topic compared to a conventionally taught class.

Much of the current emphasis on teaching and learning through ICT stresses the nature of associated activities and learning tasks. Here new technology joins forces with authentic learning to provide problem and case-based scenarios based on constructivist principles (Reeves, 1999; Reeves, Herrington & Oliver, 2002). This mirrors methods of enquiry in history which problematize learning rather than seeing it as a transfer of knowledge from teacher to learner (Haydn, 1996). In problematizing the past, students analyse sources, investigate and build their own historical interpretations (VanSledright, 2004).

As the arguments ebb and flow teachers are left to use ICT when teaching their subject. Therefore, a justification or rationale for using ICT should begin, not with the technology, but with teaching and learning in a discipline such as history. This article is based on 17 years work in the design, development and evaluation of a series of multimedia CD-ROMs for Primary and Secondary schools on themes within Scottish History.

The programs have enhanced teaching and learning but they are not, as with ICT in general, a panacea for education. Therefore, the article discusses the programs in the context of history education and the debate surrounding ICT in learning. It then moves onto a discussion of the programs with particular reference to the learning tasks. The context is Scotland, but the implications have a much wider application and feed into the more general debate over the role of ICT in teaching and learning. The conclusions stem from the relatively unusual experience of design through to evaluation over a long period of time involving a series of ICT-based resources. This article argues that ICT does allow students and teachers to study a wide range of primary and secondary sources which would be unavailable in practical terms through traditional methods and it concludes by establishing seven criteria for instructional multimedia stemming from the Scottish CD-ROMs. These criteria are pedagogy, reliability, relevance, flexibility, multimedia, utilitarianism and the continuing central role of the teacher.

## ICT in Teaching and Learning

Politicians on both sides of the Atlantic have been enthusiastic advocates of computers in education imbuing them with powers ranging from alleviating poverty to ensuring future economic prosperity. In 2000, President Clinton claimed that closing the digital divide would reduce poverty while in 2007 Gordon Brown, the then British Chancellor of the Exchequer, used the word transform six times in a short address to a national computing conference. Information Technology had already transformed our lives and would transform education (Brown, 2007). More recently, Governor Schwarzenegger announced the termination of textbooks in favour of digital formats (Tran, 2009). From the early days of computers in schools, many academics shared the enthusiasm of their political leaders. Dryden (1994) argued that hypermedia had the potential to transform the structure of schools by making them truly democratic. Other claimed enhancements cover wide areas of learning from student-centred new activities and problem solving to changes in pedagogy with teachers moving from the sage on the stage to facilitator (Wild, 1989). A changing role for teachers is often associated with more general curricular reforms which emphasise student-centred learning (Paterson, 2009), but this article argues that in the context of ICT it is too simplistic an assumption.

A different angle on the debate has been provided by those warning of an ever increasing gap between the ways students learn in and outside of school. According to Prensky, "to today's kids none of that (traditional methods of teaching) is education to them, education is getting prepared for the future - their future" (Prensky, 2007, p.1). The gulf between "digital natives" and "digital immigrants" will continue to widen without the increased use of ICT in schools (Prensky, 2001). Moreover, with computers "finally prevalent enough that they can be used routinely, like a textbook or other basic education resource" (Zucker, 2008, p.17), a major obstacle to the increased use of ICT is being removed.

The advocates of ICT often point to benefits in terms of project/enquiry based learning (McArthur, 1990; Molebash, 2004), but Oppenheimer (1997) argued that it was this pedagogy rather than new technology which enhanced learning. According to Conlon, (1999) claims of enhanced learning was only one of several "seven deadly sins" committed by those advocating ICT. Other "sins" included a loss of perspective and misrepresenting the teacher's role as moving from sage to facilitator.

These sceptics forge an alliance with surveys which paint, from an advocate's perspective, a depressing picture. Selwyn (1999, p.78) concluded that "the permeation of computers into the compulsory educational setting has been, at best, limited". Selwyn's conclusion, that this resulted from top down implementation, matched that given by Cuban (2001) for similar limitations in California schools. In their overview of the impact made by ICT, Her Majesty's Inspectorate of Education (2007, p.44) acknowledged that progress had been made, but "excellence exits only in isolated pockets" and "the overall impact of the adoption of ICT in learning and teaching does not reflect its potential". This was ammunition for the sceptics with one newspaper headline proclaiming, "computers in schools fail to boost pupils' performance" quoting the leader of one teacher trade union who stated that the "influence of modern technology in the classroom was over-rated" (Schofield, 2007). Consequently, some politicians now refer to the potential of ICT to transform learning and teaching rather than a promised land having been reached (Blane & Macdonald, 2005).

Therefore, a justification or rationale for using ICT should begin, not with the technology, but with teaching and learning in a discipline such as history.

## Teaching and Learning, History

Recent developments in history education transcend national boundaries in emphasising the evaluation of primary sources within an enquiry-based methodology. The historical thinking standards for K-4 in the USA state that students should form historical questions from working with historical documents, artefacts, photos, visits to historical sites and eyewitness accounts..." (National Center for History in the Schools, 2007). One outcome for history in the middle years of Scottish Primary Schools (age 8 years) states that students should explore places, investigate artefacts and interpret historical evidence (Curriculum for Excellence, 2009).

The national history course in Scotland for the middle years of Secondary School (age 13 - 14) develops knowledge, understanding and enquiry skills through evaluating sources, selecting and organising "information relevant to a topic or issue" and presenting conclusions (Scottish Qualifications Authority, 1997, p.9). These twin pillars of source interpretation and an enquiry-investigative method of learning help set the standard for ICT which should provide a platform for a wide range of historical evidence to support the process, fundamental to history and many other disciplines, of framing questions, researching for answers and presenting conclusions (Calandra & Lee, 2005; Calder, 2006; Wiley & Ash, 2005). Moreover, this gives ICT the interactivity necessary for effective learning since software should be more than flashy animation, it must draw the students into the activity of critical enquiry. This involves more than taking the students from the beginning to the end of the program since interactivity must move beyond the immediate by providing additional information which "the user can apply to other problems, to strengthen cognitive skills for processing new data, or to ask questions which challenge the user to think differently about the past" (Schick, 1995, p.12).

Problem-based learning also underpins authentic learning which applies constructivist philosophy to formulate open ended, authentic challenges based on real life scenarios (Boud & Feletti, 1997; Oliver & Herrington, 2003) as increasingly applied to the training of doctors and other professionals (Lajoie & Azevedo, 2000). Authentic activities also help meet demands, through their range of possible solutions, that disciplines should be presented in a number of ways to support multiple intelligences (Gardner, 1991, 1999; Choi, Lee & Jung, 2008). Nonetheless, this article argues that subjects such as history provide a crucial context and knowledge base for effective authentic learning (Young, 2007). Furthermore, they can be used to develop a wide range of skills from literacy and numeracy to those required by new technologies. (Riley, 1999; Garthwait, 2007). The emphasis on studying sources within an investigative methodology, when allied to developments in teaching and learning, notably authentic learning, provided the background for the series of multimedia resources on major themes in Scottish History.

## Multimedia and Scottish History

Three inter-related developments dominated Scotland in the 19th century. The first two changes were Highland Clearance and the transformation of farming in lowland rural areas which forced many people from their homes to forge a new life in either the expanding industrial towns or through emigration, notably to North America, Australia and New Zealand (Devine, 1988, 1994; Sprott, 1996). Thirdly, industrialisation and urbanisation transformed Scotland's towns into major industrial conurbations with the concomitant increase in slum housing and social segregation (Hillis, 2001). These developments underpin the multimedia resources which began in 1992 with the production of *Moving House* to support investigations into social segregation. *Moving House* was followed by:

- *Glasgow, A Tale of Two Cities* (1994) allows students to analyse contrasting lifestyles in mid 19th century Glasgow;

  *Tiree; Famine and Clearance, 1840 - 1900* (1996) provides a case study into the Highland Clearances;

- *Doon the Watter* (1998) takes its title from the Glasgow term for holidays and day trips down the River Clyde to towns such as Rothesay and Dunoon. Going "doon the watter" was the first example of a modern mass tourist industry;

- *Auld Reekie and the Dear Green Place* (2001) analyses life in Victorian Edinburgh (Auld Reekie) and Glasgow (the Dear Green Place);

- *Changing Scotland, Scottish Society 1880 - 1939* (2003) focuses on the impact of industrialisation and urbanisation on Scottish life with particular reference to selected themes including work, religion and popular culture;

- *Barnhill (2005)*, as Scotland's largest Poor House, Barnhill provides a case study into attitudes and policies towards poverty;

- *Ruled by the Seasons* (2009) is based on the journal kept between 1879 and 1892 by James Wilson a farmer in Banffshire, north east Scotland (Hillis, 2008). The CD-ROM allows students to study life in rural Scotland.

With the exception of *Changing Scotland*, written for students studying the Higher History Course in Secondary 5 and 6 (ages 16 - 17 years), the programs have been designed for students between Primary 6 and Secondary 2 (ages 10 - 13 years) although they have been used outwith these stages. The resources help overcome the obstacle of lack of relevant software noted by ICT co-ordinators in schools as one factor inhibiting the increased use of new technology in the classroom (Condie & Munro, 2000). It is important to emphasise, especially when discussing the evaluation of the programs, that they are not commercial products. They are examples of non-profit making, research-based curriculum development (Zucker, 2007) and discussion of their impact on teaching and learning should not be seen as marketing. Moreover, Her Majesty's Inspectorate of Education identified *Ruled by the Seasons* as an example of good practice in one of the pilot schools. (HMIE, 2009).

*Moving House* and *Glasgow, A Tale of Two Cities* were produced before the advent of CD-ROM technology which precluded the inclusion of high quality sound and images. Subsequent programs used the potential of CD-ROM technology to include film, graphics, music, large databases, sound and high resolution images. Nonetheless, all programs were built round similar features exemplified by *Ruled by the Seasons*.

The program is based on James Wilson's descriptions of farming life in the late nineteenth century and contains a series of linked primary and secondary sources including photographs, archive film, digitised video, music, extracts from newspapers, eye-witness accounts, secondary sources and a database containing the 1881 population census for Banffshire (61,108 records). One suggestion in student and teacher evaluations of the early programs was that a relevant historical character should lead users through each chapter. Consequently, a 'virtual' James Wilson appears at important points to introduce new themes and chapters. Following a further suggestion by teachers, every written primary source was recorded and included as an audio file.

The range of primary and secondary sources links together in ways which allow students to investigate, visualise and create their own interpretations of the past. For example, Wilson's descriptions of friends, neighbours and local trades link to searches of the census database in which these people and places were recorded. His description of each stage in the farming year links to relevant clips of archive film. Archive film, as will be discussed, received high ratings by students and teachers for its usefulness as a historical source (Swan, 1996). Other programs contain similar features. *Auld Reekie and the Dear Green Place* holds aN 1851 and 1891 census database for contrasting socio-economic areas of Edinburgh and Glasgow, and in *Changing Scotland* archive film of Glasgow slums helps illustrate housing conditions. It is, however, important that students understand the origin of databases and that their reliability does not stem from the technology, but the accuracy of the original data, which in the case of the census, cannot always be assumed. Therefore, each program comes with paper copies of the original census returns with questions of reliability raised by the inclusion of a contemporary cartoon.

At a time when multimedia dominates many aspects of everyday life, it is important that students understand something of its production (Debiase, 2008). Consequently, the CD-ROMs hold media from which students actively create their own interpretations of the past through a "learning experience that prime(s) appropriate cognitive processing" (Mayers, 2001, p.19). Students import archive film from *Ruled by the Seasons* into programs such as Moviemaker to create an interpretation of rural life in film. Students using *Barnhill* locate and select appropriate images and film to illustrate their presentations of life in the Poorhouse. TABLE 1(below) demonstrates that these are only two examples of how the learning tasks cater for multiple intelligences (Gardner, 1991, 1999).

TABLE 1: Sample Learning Tasks and Multiple Intelligences

| Multiple Intelligences | Sample Learning Tasks |
|---|---|
| Linguistics | Variety of writing including short paragraphs, longer essays, scripts and poetry. Reading first-hand accounts of events. Giving presentations. |
| Logical - Mathematical | Statistical analysis of changes in population resulting from increased mechanisation in agriculture. Interrogating census databases and analysing the results. [These and the linguistic tasks help meet current concerns over levels of literacy and numeracy (Scottish Government, 2009).] |
| Spatial | Sorting a sequence of photographs to illustrate a year in farming. Creating a bar graph to show the results of a questionnaire into food and shopping. Creating wall displays and banners. |
| Kinaesthetic | Scottish Country Dancing. Using role play to recreate an interview between a Poor Law Inspector and an applicant for poor relief. |
| Musical | Listening and singing songs and music inspired by the past, for example, the Skye Boat Song. Playing fiddle music. |
| Inter/intrapersonal | Working individually to investigate an area of interest. Working as part of a team during the authentic challenges. |
| Naturalistic | Visiting local farms and distilleries. Building a green house out of plastic bottles and planting a vegetable garden. |

Many of these tasks relate to specific sections in the relevant program, but it is important that students see the whole picture as it relates to the topic. Active participation in authentic learning binds the topic together (Dennen, 2004). The farming challenge in *Ruled by the Seasons* presents students with a scenario whereby a group of tourists from various counties are coming to visit Scotland.

They wish to learn about farming in the past and are going to visit a farming museum, but before the visit they have asked for a leaflet which shows some of the work done by farmers in the past. Although most of the party speak English, the leaflet should also be produced in one foreign language. The challenge outlines criteria for the leaflet which must be laid out clearly with title, headings, images and a word-processed explanatory text. Leaflets should include pictures taken from the CD-ROM and internet sites such as SCRAN (2009). An expert from a local museum should judge the leaflets using an evaluation form designed by students from an on disc template. This integrates assessment into the challenge (Weatherley, 2003). In the Barnhill challenge, teams of archaeologists, the students, devise and give a presentation to a panel of experts justifying their choice of three artefacts found on the site of the Poorhouse for display in a new museum of social work. Presentations must set Barnhill in its historical context and describe life therein. Students also compile an assessment sheet for the panel to use when judging each presentation. Successful completion of these challenges requires knowledge of the wider topic and a range of skills from art and design through to working in teams.

The article now discusses how teachers and students have used and evaluated the programs.

## Classroom Implementation and Evaluation

### Implementation

Flexibility has been the watchword in relation to the selection of content and classroom organisation. One school used *Doon the Watter* as a source of information on shipyards and ferries to create a tile display about the River Clyde. Another school used the program when studying tourism past and present. *Auld Reekie* provided one resource for a topic on the Victorians with pupils studying selected sections. One teacher noted that this program was the principal resource for a topic on the Victorians since "ICT was an important aspect of our approach and therefore we allowed children to look at all parts". A local dimension gave the CD-ROMs added relevance. Helensburgh, a small town on the Clyde coast, was a popular holiday destination and one teacher in a local school reported that some students were able to locate in *Doon the Watter* the street they now lived in, "finding neighbours on either side so [the children] were quite delighted particularly when we have information like that appropriate to our area".

The time allocated to any given program varied as a direct consequence of these different approaches with the maximum allocation of two afternoons per week for 20 weeks when the program was in effect the topic. The availability of computers influenced classroom organisation, teaching and learning. The first programs came at a time when the limited numbers of computers necessitated, as one teacher noted, "...2 to 3 pupils working together... at 3 computers. After twenty minutes they changed over. I have 32 in the class, this was the only way I could organise each session to ensure as many pupils as possible could take part". This mixing of computer and non-computer work has remained the pattern, but interactive whiteboards and class sets of laptops now support independent learning. "I used the Smartboard and laptops", recorded one teacher, "with pupils to focus on certain areas, particularly in the early stages when introducing database searches etc. As a class we were able to discuss pictures/film available on the disc, children were then able to work independently through the program (Barnhill)". Interacting between a CD-ROM and the interactive whiteboard has become the common pattern, exemplified by the following observation:

*"At first whole class explanation and use of CD-ROM using Smartboard. Subsequently, 1 or 2 to each PC working through tasks for each aspect of the topic... At the end, they used Smartboard again to explain/discuss essay writing".*

Teachers expanded the suggested learning tasks to widen the student experience by taking "their interests into other fields for display work to get a feel for Victorian life". One student recorded that her classmates had used books and the internet to research the art work featured in a wall display and banner. This helped her learn about life in Victorian Edinburgh and Glasgow "because we had to do a lot of research for it". One Head Teacher explained how *Ruled by the Seasons* supported a wide range of cross-curricular work:

*"The program stimulated a homecoming panel as this is the year of homecoming. It supported map work and pupils enjoyed using the Ordnance Survey maps which accompany the CD-ROM because it was familiar being the local area. Some of the pupils who would not normally enjoy this type of work were really engaged because of the local dimension, they knew where the farms were on the CD. Pupils cooked and baked - they baked bread, made oatcakes and butter which also involved a lot of Maths since they were weighing and measuring. There was graph work involved in the survey [into where people shop and what they eat] so pupils interpreted data and made their own displays of data. Literacy skills were developed with diary writing. Just as James Wilson kept a diary, so did the pupils".*

These comments indicate that for multimedia to enhance teaching and learning it must be flexible, supportive of cross-curricular work, relevant to local and national dimensions and home to a wide range of learning tasks. These criteria apply to traditional resources, but multimedia requires higher standards based on providing access to resources, which in a practical sense would be very difficult to manage in more conventional means. It would be possible in theory for students to search laboriously through pages and pages of census data, but a database carries out sophisticated searches in a matter of seconds.

Multimedia also links a wide range of diverse sources and media in ways which could not be replicated when using each separately in the classroom. Speaking of *Changing Scotland*, one teacher noted that it "packed in a lot but at the same time presented a manageable way through the topic". However, pedagogy remains the central consideration as shown in the more formal evaluations by teachers and students.

## Evaluation

Evaluation of the programs has taken place at several levels: questionnaires completed by students and teachers; follow-up interviews; cooperative teaching between the author and class teachers using each CD-ROM with production of DVDs showing teachers and students working with the programs to illustrate the integration of ICT into teaching and learning. This section focuses on the findings stemming from these questionnaires and interviews. In all, 251 students between 10 and 12 years and 10 teachers evaluated *Auld Reekie*, *Doon the Watter*, *Barnhill* and *Ruled by the Seasons*. One teacher and 24 students aged 16 - 17 years evaluated *Changing Scotland*. The key findings illuminate the debate on ICT in school education.

The evaluations were organised by the author perhaps raising issues of reliability and bias. However, students and teachers independently completed the questionnaires and, as noted above, the programs are non-profit making. The latter does not *per se* nullify the wish for positive comments, but criticisms were encouraged with many suggestions incorporated into subsequent programs with, for example, *Changing Scotland*, having a facility allowing student notes to be saved into a separate folder on the user's drive. The trialling process also tested the programs' reliability and robustness on a wide variety of computer platforms.

In their questionnaire, students evaluated the primary sources and the learning tasks. Further questions focused on general reactions to the programs and the impact on ICT skills, knowledge and understanding. A pre-and post-topic assessment was also used to gauge knowledge and understanding. A separate section in the questionnaires focused on the critical skills challenge.

Teachers evaluated key features of each program, including: general student reaction; ease of use; content and sources; and the impact on teaching, learning, classroom management/organisation, knowledge, understanding and skills. Teachers also evaluated the critical skills challenges with both students and teachers encouraged to suggest how the particular program could be improved. The evaluation did not assess the impact on achievement partly because there was no comprehensive assessment of the topics and it was not practical to establish control groups which could have received traditional instruction. For example, one evaluation of *Ruled by the Seasons* was carried out by pupils in a composite Primary 5, 6 and 7 class in a very small rural primary school. Consequently, many of the findings are qualitative.

The following discussion of the findings concentrates on general student reaction to the CD-ROMs, evaluation of the primary sources and impact on knowledge understanding, skills, teaching and learning, including the critical skills challenge. One feature of the results is consistency across each program. For example, students rated the film, census databases, photographs and first hand accounts as the most useful sources in every program.

Challenge and enjoyment have become the watchwords in the curriculum (Learning and Teaching Scotland, 2009). While over-emphasis on enjoyment downplays the hard work and delayed benefits of learning, it is an important determinant of motivation. Most of the programs have proved popular as shown by students recording that they had enjoyed studying *Barnhill* (89%) and *Ruled by the Seasons* (95%). *Barnhill* was enjoyable because "it made you think about people in their times and how they lived" and *Ruled by the Seasons* was a "computer based topic so if you didn't understand something you could look it up. It also gave you lots of information on places/people/things. I have learned so much about farming". The reasons for not enjoying *Barnhill* included: "it was not interesting", "it needed more visual representation" and "I got confused".

*Changing Scotland* proved the least popular. "It may have been useful and enjoyable at the beginning of the year", noted one student, "however, it seemed to waste valuable study time when the exams are near". In Scotland, unlike the U.S.A., external examinations measure student performance with ICT often regarded as a time-consuming extra detracting from covering the necessary content. In fact there was no evidence in student final grades that *Changing Scotland* had any adverse impact on attainment, but the programs proved more popular when used with younger students on courses without external examinations.

All teachers reported that the programs were robust and easy to use rating each at either 1 or 2 on a scale of 1 (very easy) to 5 (very difficult) since "contents were easily accessible. New/unfamiliar words explained [and] information presented in a variety of ways e.g. words, pictures and film". The multimedia aspect was highly valued because it "helped to make lessons and discussion come alive... activities compiled to work with the program led to some good quality resource based learning". The students "particularly enjoyed using the database. They also enjoyed the video clips as they brought the topic to life and made it seem more real".

Negative teacher comments related to "any page with too much script, they were impatient to continue and reluctant to take time to read it" and the inability to save notes. These criticisms led to audio recording of the first-hand accounts in later programs and a note-taking facility in *Changing Scotland*.

Students agreed with their teachers in the evaluation of the primary sources. One class (N=24) typifying the overall findings when 25% of students rated the census database as the most useful source for studying the past followed by film and video (24%), photographs (22%) and first-hand accounts (14%). The perceptive reasons given for this order of priority, and it is worth emphasising that all the following unprompted comments come from students aged between 10 - 12 years, show an appreciation of primary sources within new technology. In the census databases:

*"You can type in a name and up would come the ages and things like that",* and

*"You can find the exact information you want, you can find it quickly as well".*

The process of framing questions and then searching the database developed the first two stages of enquiry, but learning went further:

*"We first looked at the census which was interesting, then we went deeper, looking at people's lives and where they lived".*

*"It gives you a lot of information... it makes you think. It makes you think hard. It does involve a lot of thinking. Like looking up the census, it just gives so much information".*

The census databases moved beyond information retrieval to support investigative skills challenging pupils to think differently about the past. Two students discussed farming life in the past:

*"It was a much harder life than us. If you think about nowadays we're all lazy because what they did back then they had to be really fit and they were always working everyday".*

*"We're just now not used to anything like that so it's hard. It's shocking when you see what they've done and what we do when compared to that , it's horrible, it shows you how lazy we actually are. They people could actually do that much in a day and we would do less than that in a week".*

Film and photographs were helpful because "you actually see what is happening" and in the first-hand accounts "the people had a lot to say and that's good because if you have to ask anyone about the past it would be them". The essence of effective learning was captured by a further observation on the first-hand accounts which "made me think more and then you will know more". Students also valued the linking of different sources: "I looked at the database, building ships and the River Clyde. I used the pictures and video to gather information. I liked the one of building the ships".

Students had a clear understanding of how more traditional creative and aesthetic activities assisted learning: "We made a wall display, street scene with characters [which] helped me because it got me to know what Victorian times looked like". In *Ruled by the Seasons* "we did prints that told us what they grew and we made a Scottish rural landscape that showed how lovely the land was for them". Students undertook "personal research using books and the internet" to produce their wall displays which makes it difficult, as noted above, to measure the programs' impact on knowledge and understanding. Nonetheless, they were the central resource and after studying *Changing Scotland* every student could describe five ways in which industrialisation and urbanisation had affected Scotland. No student could successfully complete this task at the beginning of the topic. FIGURE 1 (right) demonstrates that the key features of the Poorhouse regime were accurately recorded by students (N=63) at the end of the topic.

FIGURE 1: Key Features of Life in a Workhouse Environment
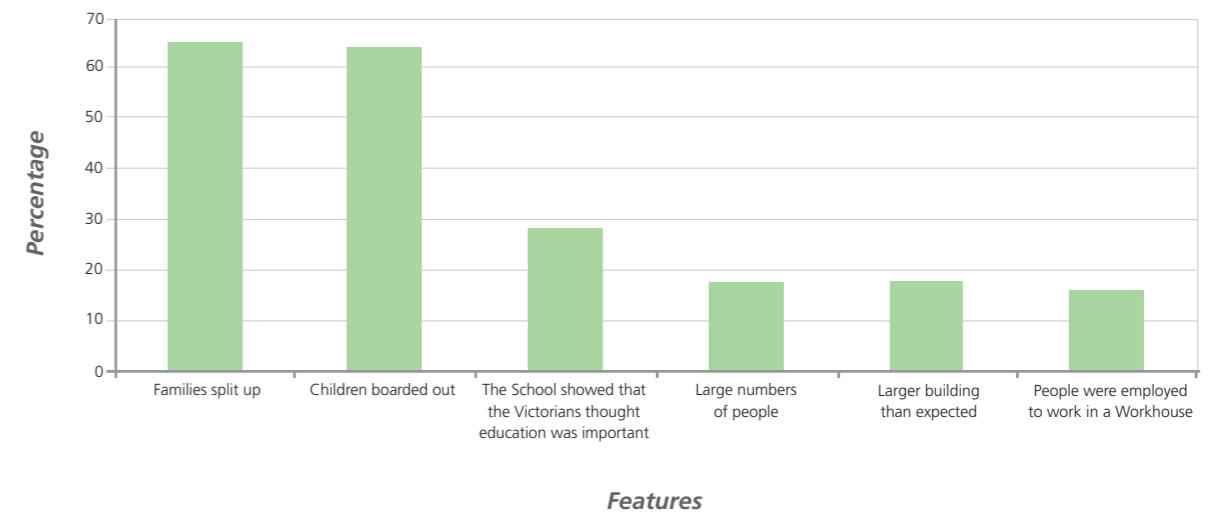


It might be argued that these demonstrate a basic level of knowledge and understanding, but the given features were central to Poorhouses and show students empathising with children forced to reside in *Barnhill*. Students demonstrated a deeper understanding in other tasks such as writing an essay explaining the causes of poverty and discussing possible reasons for contrasting evidence on conditions in *Barnhill*. FIGURE 2 (below) shows one student's perceptive evaluation of life in rural Scotland. Knowledge of the topics set the context for the authentic challenges.

FIGURE 2: Life in Rural Scotland



7. Please list the 5 most important pieces of information which you learned about life in rural Scotland.

(i) How the farmer depended on the weather so that his crops would grow.

(ii) How crops can be used for cereal, whisky, bros and many other foods.

(iii) If a farmers horse died he would need to buy a new one and couldn't plough without one.

(iv) They didn't have machinery to do the work they had to work extremely hard theirselfs.

(v) How nowadays there isnt so much work to do and they dont have to work from dawn to dusk.

The challenges supported many areas of learning from knowledge to presentation skills.

The Farming Challenge allowed pupils to develop their knowledge of farming in the past with teachers noting that it developed a wide range of skills including selecting appropriate images, writing the text, working in groups and using Publisher. FIGURE 3 (below) is one leaflet produced by three students.

FIGURE 3: Farming in the Past Leaflet

**Farming**

By
Christopher
Declan
Jade
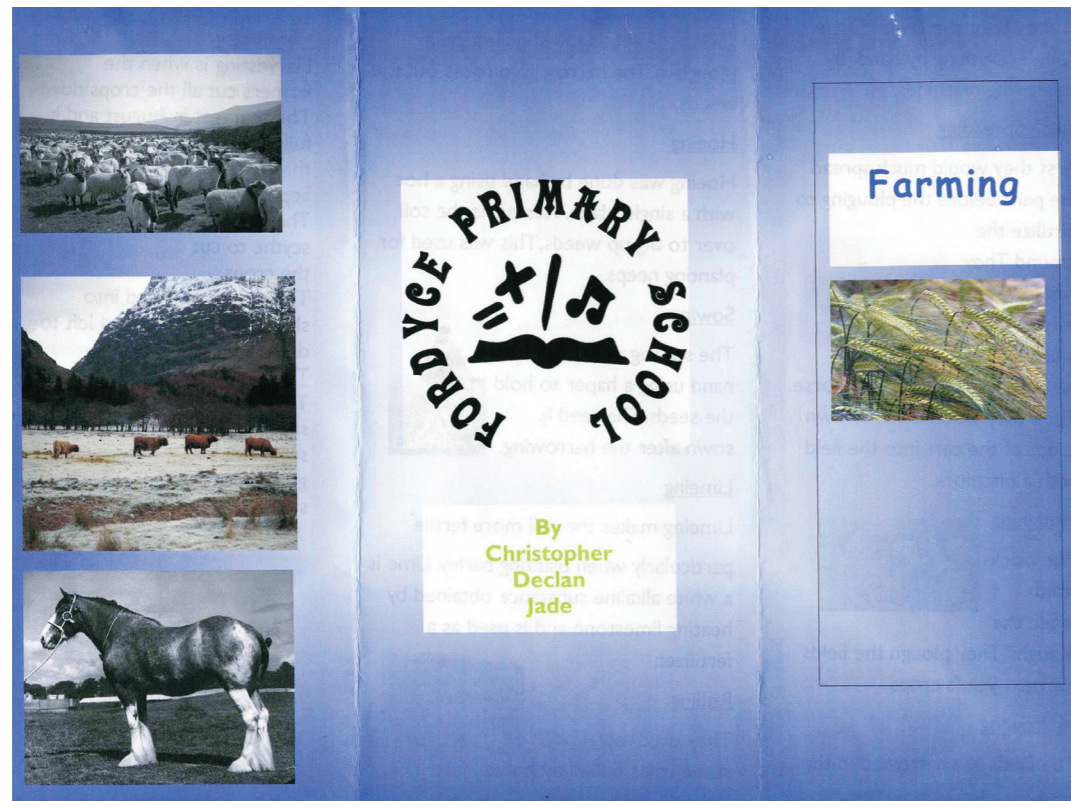
In the 1880s they would have done everything by hand  by not having machines.

Muck Spreading

First they would muck spread the park before the plouging to fertilize the ground. They would have held the muck in the back of a cart pulled by a horse. Then they would have thrown it out of the cart into the field with a pitchfork.

Ploughing

The black-smith made the ploughs. They plough the fields for next year's crops.

Harrowing

The fields are harrowed in the

spring this levels the soil after being ploughed. The harrow also roots out the weeds.

Hoeing

Hoeing was done by hand using a hoe with a single blade. This turns the soil over to dig up weeds. This was used for planting neeps.

Sowing

The sowing was done by hand using a haper to hold the seeds. The seed is sown after the harrowing.

Limeing

Limeing makes the soil more fertile particularly when planting barley. Lime is a white alkaline substance obtained by heating limestone and is used as a fertilizer.

Rolling

They used metal or stone roles pulled by horse.

Harvesting

Harvesting is when the farmers cut all the crops down. They harvest in August and it follows through to September. They used a scythe to cut the crops. The stalks were tied into sheaves or bundles and left to dry.

Threshing

They put the sheaves into a steam thresher which separates the grain from the stalk.

By
Christopher
Declan
Jade

79% of students gave the Barnhill Challenge the highest rating on a three point scale in developing knowledge and understanding of Victorian Glasgow. Finding out, thinking and challenge emerged as key reasons:

> "We had to find out more for our presentation and we found out different things";
>
> "It made me really think about being boarded out and the school etc.", and
>
> "It helped me improve my knowledge because it challenged me and gave me answers to different questions".

Using PowerPoint for the presentations involved students in tasks such as "gathering information, writing a script, decorating our presentation [by choosing] colours, backgrounds, pictures, animation and sound effects". Consequently, "I know how to make a presentation. I know more skills on the computer, how to find information". "Because when we have to do it I had to read it", was a more pithy observation on the challenge.

Assessment supported learning with students asked to rate on a five point Likert scale how key aspects of designing the evaluation form helped improve their presentation skills in the Barnhill Challenge. FIGURE 4 (below) shows the percentage of pupils giving each skill the top two ratings demonstrating that these included devising and giving a presentation.
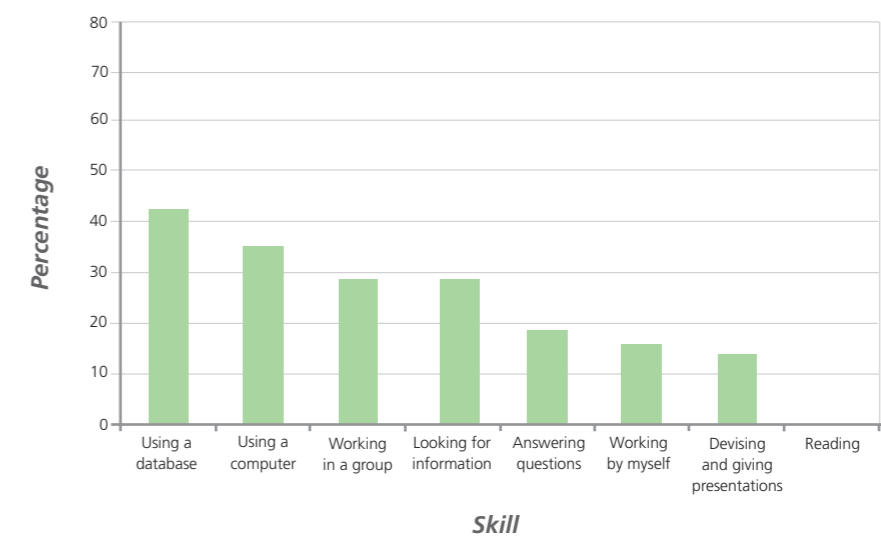
FIGURE 4: Advantages of the Assessment Form Given the Top Two Ratings
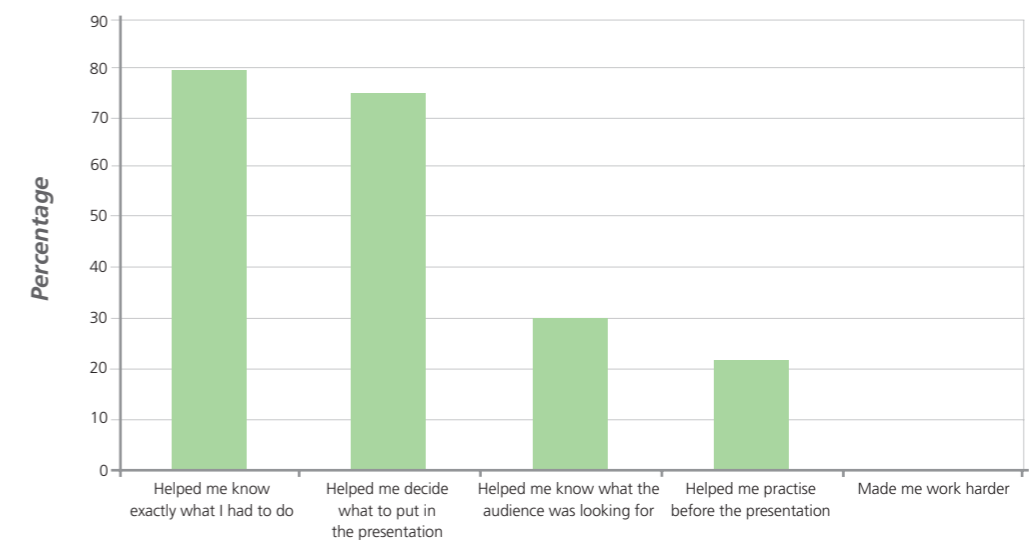
The challenges influenced the ratings given by students for eight computer and non-computer based skills developed by the programs. FIGURE 5 (below) gives one school's (N=47) results for *Ruled by the Seasons*:

FIGURE 5: Students Rating Skill Development in the Top Two Categories

The highest ratings reflect the positive evaluation of the census databases and re-inforce the impact of the Farming Challenge where students worked in groups looking for information.

Teachers also reported that the development of knowledge and skills moved beyond history and ICT into the inter-personal and the ability to give presentations. This was particularly true of the authentic challenges which, in addition to improving skills relating to tools such as PowerPoint, enhanced "team skills, discussing and justifying choices and making decisions as a group. Delivering presentations to the class, use of voice, clarity of explanations, dealing with and responding to questions". Every teacher recorded improved computing/keyboard skills with the context provided by history giving "a reward and purpose to learning certain skills on the computer". Traditional subjects can, therefore, play an important role in helping students see the relevance of arguably the less fashionable, but nevertheless important ICT skills such as compiling a database.

Enhanced enquiry/research ran as thread through the teacher evaluations with the programs bringing "a new dimension to research. They found it enjoyable and interesting. This enhanced their enthusiasm for the topic". The teacher's role did alter since "one of the most important parts was the experience of the teacher and pupil learning together. Pupils polished their research skills", and, "...a group of children, when set a task, could work well together with the minimum of teacher input". This would seem to support arguments that ICT changes the teacher from a 'sage' to a 'facilitator', but it is an over-simplification. The Barnhill Challenge did enhance "skills in preparing a presentation, but the accuracy of the content in some cases highlighted a need for research to be more thorough and more closely monitored by the teacher to achieve a greater understanding of the period". While students "love working on the computer, searching the database, finding information, sometimes I think they need a bit of help actually coming to some conclusions about the information on the computer. They make assumptions very quickly and have reasons for things happening which might not be correct. So just leading them through that a bit more carefully". Teachers were involved in myriad other activities central to effective learning from planning, explaining and enthusing students with the stories in history to assessing and monitoring student progress. The teacher's role may have altered, but it was not diminished.

The generally supportive student evaluations indicate that the programs enhanced learning from knowledge through to a variety of skills. This resulted from the alliance between ICT, traditional sources and a pedagogy embracing enquiry, varied learning tasks and authentic learning.

## Criteria for Instructional Multimedia Design

The development, evaluation and dissemination of the multimedia CD-ROMs demonstrates that it is possible to steer a middle passage between claim and counter claim regarding ICT in education. Enhancing rather than transforming is the keyword. Conlon (2001) criticised the seven deadly sins often committed by the proponents of new technologies, but this article concludes by discussing seven criteria, namely, reliability, relevance, flexibility, pedagogy, multimedia, teaching and utilitarianism which must be met if ICT is to enhance teaching and learning.

Multimedia in history and other subjects must be reliable, relevant, flexible with a degree of utilitarianism. A survey (Stark *et al.*, 2000) of ICT co-ordinators into the impact of ICT initiatives in Scottish Schools identified software problems and unreliability as significant obstacles. Consequently, programs must be robust, reliable, and easy to use on a wide variety of different computers and error free. These may seem as non-sequiturs, but they have not always applied and a class of thirty students combined with unreliable software can prove a combustible mixture. Reliability is closely linked to the requirement for teachers to be given the time and training to become confident in using both hardware and software. One teacher reported that she was more confident in using the Scottish programs following in-service training since "before that it was trial and error".

Relevance closely follows reliability. It is more difficult, largely on cost grounds, to produce software in countries with a relatively small education market and for non-core subjects such as history, especially national and local history. The internet helps students study digitised versions of resources held by local and regional museums, but there continues to be a role for CD-ROM technology since copyright prevents sources such as the Scottish Census from being freely available online. Local, regional and national history gives multimedia added relevance. "I looked at the database", wrote one student of *Doon the Watter*, "building ships and the River Clyde. I used the pictures and the video to gather information. I looked at the one of building ships. I found out the people who lived in my house before me". Moreover, a focus on the national through to the local means that software is more likely to target the relevant syllabuses.

The potential for ICT to enhance the curriculum is further increased by flexibility. The returns on the investment of time and finance by schools are maximised when programs apply widely across the curriculum from art and history to science and technology. Furthermore, many underlying themes, such as the growing disparities between rich and poor and policies towards poverty, cross national boundaries.

For example, Blackwell Island Workhouse in New York (Correction News, 2006) grew from similar legislation that spawned Barnhill Poorhouse. Therefore, it would be possible to produce in the United States similar resources to the Scottish CD-ROMs.

Software must live up to its billing as multimedia by making available to students and teachers a wide variety of sources that support analysis and investigation from different perspectives. Nevertheless, students should also examine evidence outside a multimedia environment by, for example, handling artefacts, investigating through field studies and critically discussing the reliability of the original census data used to compile a database. This 'mixed economy' applies across subjects from art to technology where multimedia can enhance, but is no substitute for seeing a painting or constructing a model.

Technology provides the medium through which students study varied sources, but it must play in harmony with the underlying pedagogy from which evolves the learning tasks to develop skills built around thinking, reasoning, investigating and problem-solving. Authentic activities deepen this process since, properly formulated, they involve students in solving complex problems while at the same time advancing skills such as information handling, creating and designing (Kozma, 2003). Nevertheless, this takes place within the context of a knowledge base provided by history. Current reforms of the curriculum can sometimes stress the importance of ICT as if it was a standalone entity as in the proposed reform of the Primary School Curriculum in England where students "should learn how to blog and use internet sites... and spend less time studying history" (BBC News Education, 2009). This puts the cart before the horse and decontextualises learning. This article demonstrates that it is not only possible, but also more effective when a subject discipline and ICT form an entente cordiale. Students see the relevance of a database when searching a census database. Knowledge of a topic gives student presentations using tools such as Podcasts, PowerPoint, and Moviemaker a context, framework and rigour. Moreover, the cross-curricular dimensions of an authentic challenge require prior understanding of the contributing disciplines.

Herein lies a continuing and pivotal role for the teacher who is much more than an enabler. Teacher knowledge of a discipline or disciplines is essential for effective teaching and learning as it provides the foundation for critical enquiry running in parallel with the development of student knowledge, understanding and thinking. Teachers cannot explain if they do not know. The internet and multimedia may help in providing some answers, but it is teachers who must help students develop critical if not sceptical minds towards these relatively new sources of information. Moreover, knowledge of a topic or subject discipline provides the whole picture which students cannot be expected to know so allowing teachers to plan a route through learning. Even independent learning requires guidance and monitoring. Students often may be more technologically 'savvy' than their teacher, but this does not justify substituting the word 'teacher' with soubriquets such as 'enabler' or 'facilitator'.

The use of ICT is not justified by being an end in itself. It is a means to the end of effective teaching and learning which have wider benefits to society, but claims that ICT will either transform or reduce social inequalities provide many hostages to fortune. ICT is an important tool in the teacher's armoury, but this does not detract from the more traditional. The teacher's ability to enthuse through the story of history and other subjects remains a powerful tool for learning. Technology supporting pedagogy remains the central criterion.

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# The Controversial Past and Trauma In History Education. Approaches and Remarks

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*Abstract - We present theoretical presuppositions by clarifying the reasons why the fact of approaching the controversial and traumatic historical past, in the context of school education, is urgently needed nowadays, despite of the dangers, the reactions, and the difficulties, that such a task inevitably involves. We propose an holistic methodological framework, in the service of approaching the controversial and traumatic historical past, seeking cautiously the tentative balance between (a) the deep, comprehensive, and inclusive understanding and (b) the moral responsibility of historical consciousness. Furthermore, we present indicative examples of approaching the traumatic and controversial historical past.*

*Keywords - Analogies, collective identity, consciousness, controversial issues/past, didactics, empathy, epistemology, genocide, historical consciousness, historicity, historiography, holocaust, identity, memory politics, memory, modernism, nationalism, nationalism, new history, oral testimony, postmodernism, public history, racism, reconciliation, Rüsen, school history, Stalinism, textbooks, traumatic past.*

## Introduction

To the question about history's pathology as a perpetual reconstruction and re-signification of the past, the pessimistic answer necessarily is that the form it can take is either rationalization and justification/legitimization of the present, that is, of the *status quo*, or a nostalgic/emotional and always selective regard/reminiscence of an idealized past, a golden era or a national tradition, all different from the decadent present, or, finally, escape to the utopia signaling the complete renunciation of the present. All these cases involve the shaping of historical consciousness forms contrary to scientific historical discourse (Foner, 2003 p.87). Reminiscence of an idealized past in particular is the fundamental enemy of historical understanding, because it distorts parts of the past while at the same time ignoring others (selectivity), although it must be pointed out that radical nostalgia may provisionally become - for instance, in Walter Benjamin's romantic anti-capitalistic viewpoint - a strong form of protest against the alienation of the present (Foner, 2003 p.85).

Sure enough, it is much easier, under conditions of crisis, uncertainty or transition, to de-legitimize a superannuated or solidified view of the past creating and solidifying a new one. Let us not forget that in societies plagued by civil conflicts and religious or political controversies, like Northern Ireland, the school subject of history and, more generally, history within the public and the private sphere, is used not to explain or assuage conflicts, but rather to give them force and perpetuate them (Kitson, 2007 p.123).

Revision of the past leads to a rupture of generations: older generations adhere to memory and experience, tied down to historical facts giving meaning to their lives, whether they are glorious or tragic, indeed feeling their life would have no meaning and purpose when posterior facts or indifference and hostility of the younger negate their contribution and sacrifices; on the other hand, the younger, condemning *en messe* the past or certain historical periods of the past, sometimes end up relativizing and degrading even critical historical facts. A typical example is the Russian youth's indifference for the national anniversary of May 9th 1945 (capitulation of Nazi Germany, the victory of the Allies, recognition of Soviet Union people's sacrifices), a result of their absolute hostility towards the communist past (Foner, 2003 pp.84 - 85).

French historian Benjamin Stora describes historiography's, particularly Public History's, as well as the general historical culture's transition - indeed, at an international level (from South Africa, Algeria, Morocco, Argentina, Chile, Australia and USA to Poland, Russia, Germany, France, Turkey, Romania, Cambodia, China, Korea and Japan) - into a painful phase of imperative "judicial inspection and revision" of the controversial and traumatic historical past (*judiciarisation de l' histoire*),[1] which, according to many scholars, may be the most "sensitive" aspect of a general process of confrontation with the past (*Vergangenheitsbewältigung*), that in its turn signals the articulation and conflict of contrary political approaches to history and memory, collective identity and historical consciousness, aiming at cultural and ideological hegemony.[2]

1.   See the special issue of the International Society for History Didactics, *Yearbook 2008/09*, Vol. 29/30, Wochen Schau Verlag. Most interesting were the contributions of Winfried Schulze, "Erinnerung per Gesetz oder 'Freiheit für die Geschichte'", pp.9 - 37, and Luigi Cajani, "Historians between Memory Wars and Criminal Wars p.The Case of the European Union", pp.39 - 55. Essential documents on the attempt to penalize historical memory can be found at the Network of Concerned Historians - Resources, "Judicialization of History/Memory Laws/Hate Speech.
Available online at: http://www.concernedhistorians.org/index.php?option=com_content&task=view&cid= (Accessed: 20/10/2009).
2.   Peter Burke, *What is Cultural History*. Polity, Cambridge 2008 (second edition), p.67. Burke explains that the strong interest in historical memories is a reaction to the acceleration of the threatening social and cultural change.

This revision finds its legitimization within the hegemonic, normative, universalizing discourse of human rights and the "immediacy" and authenticity of oral testimonies on controversial historical facts of the 20th century, in particular traumatic experiences of certain groups-victims ("pedagogy of pain")[3]. It concerns accountability of states or their officials for atrocities against certain groups (ethnic cleansings, genocides, the Holocaust, coercion to prostitution), that is, crimes against humanity not subject to statute limitations, on the one hand[4]; on the other hand, it concerns the recognition of ills suffered - during the "short" and particularly criminal 20th century - by persons and social, political, ethnic, cultural or religious groups because of the politicization and the monstrous application of the dystopic demand for ethnic and national purity and homogeneity (national socialism), as well as its opposite demand of total equality (Stalinism).[5]

Moral decline and the subsequent delegitimization, as well as, partly, the demonization of these two structural political-ideological postulates of modernism, nationalism/racism and Stalinist communism, that is, the awareness of almost total destruction caused during the 20th century (at least according to the judgment of the educated parts of the "euro-atlantic society"), results to their transformation into unhistorical moral categories or abstract ideological identities and, subsequently, the use of these categories and identities to construct historical analogies (comparison of totalitarianisms with contemporary terrorism and the several forms of fundamentalism, for example), on the one hand; on the other hand, to create moralistic politics of memory intended for historical correction of the masses and fashioned like a chain of linear exemplary and condemnable forms of collective violence (Armenian genocide, Pearl Harbor, Auschwitz, Gulag, Hiroshima and Nagasaki, Apartheid, Bosnia, Rwanda).

These politics hide in their core the contemporary technologies of fear's instrumentalization (concerning the threat posed during the first years of the 21st century by demonized "opponents of democracy", such as nostalgics of totalitarianisms, minorities, immigrants, metropolis outcasts, multiculturalism, epidemics) and incitation of moral panic concerning a supposedly imminent ultimate danger for the western civilization or the states and their national idea (Judt, 2009 pp.18 - 19).

Such an ideological signification of the 20th century, in combination with a future crisis and the domination of a presentist *status quo* of historicity, at least across the western world, shrinking the horizon of expectations and undermining the historical creativity of peoples, lead in our days the institutions of the European Union to judicialize memory, not just that of "totalitarianisms", but also that of the multiple forms of the Left's critique of the dominant model of bourgeois society. The radical ideologization of 20th century history and the self-complacent presentism of western postmodern societies are thus the two decisive factors that paved the way for the constant presence and exemplary/corrective function of the controversial and, most importantly, traumatic past in the present, particularly the emergence and persistent reinforcement of the obsession - of the intelligentsia, as well as the political order and the public opinion - with traumatic memory. This memory, instead of assuaging or healing, rather revives the past's historical traumas, conflicts and disunity. It leads to "memory crises", essentially to crises of ideological hegemony, where the self-understanding of a nation or conflicting political parties is usually at stake, along with the relation of identity-difference that can only have an organic relevance concerning the way of dealing with "dark pages" of the past and therefore the canon of official history[6].

Contemporary society's existential confrontation with the past is straightforwardly reflected in the unprecedented manifestation of interest in the goals, the content and the didactic methodology of School History, determining to a great extent the sense of belonging, the historical culture and consciousness, as well as the youth's political socialization (Torpey, 2004 pp.247, 250 - 251). Furthermore, the isolation and the fixation of victimized groups on their traumatic memory in an attempt to shape ties among their members and claim their visibility through public recognition of their individuality and consolidation of their social equality is increasingly concealing the intention to imaginarily overcompensate or actually overturn relations of inequality and conditions of frustrated rightful expectations of social, political and cultural integration or moral satisfaction for suffered ills (Vergès, 2008 p.160).

This claim to recognition of sufferings in the framework shaped by meta-national and meta-socialistic conditions leads, as already mentioned, to the construction of state, as well as supernational and in a way universal, politics of memory, where UNESCO, the UN, the Council of Europe and the European Union play an increasingly greater part in their formation and announcement, forcing states to adjust to the new contexts of unified management of the past[7]. Politics of memory - a critical dimension of identity politics - are fed by the inflation of memory bringing about the shrinking or even full substitution of the historical treatment of the past through testimonies and records of traumatic experiences[8]. A fundamental aspect of Memory Politics, also referring by definition to politics of historical oblivion, consists in the multiplying establishment of new historical anniversaries, the construction of monuments, the institution of new museums and scientific foundations, as well as the provocation and advantageous management of symbolic conflicts on history within the public sphere through the mass media.

Politics and wars of memory - an indication of structural crisis in the conventional view of national identity, nation self-understanding and its relation to its past - aim at a retrospective historical justice through integrating historical contribution of victim groups into the official narrative of national, European and world history, the realization of which amounts to the reorganization of nation-state official collective memory. Moreover, the planning of Memory Politics also functions as a mechanism of intra- and inter-state negotiation[9]. However, even if the EU is progressing towards its continuous enlargement and gradual unification of the European continent's states, constructing common ground and seeking for common visions, the sphere of experience, i.e. memory, especially that of WW II, still suffers, remaining asymmetric, dividing, traumatic and controversial, since there are still horizontal and vertical gaps within member-states, as well as globally, putting into question any sense, cultural claim or political will of substantial, actual unity (Judt, 2009 p.826).

The dominant trend of the controversial and traumatic past's revision, as well as the democratization of national narratives is, according to Stora, the result of the extraordinary dynamics of memory in the contemporary postmodern world of post-materialistic values, globalization and the normativity of human rights discourse; still, it is above all the effect of uncertainty for the future after the collapse of master ideological traditions and the emancipation claims, creating a very narrow or empty horizon of expectations (*vide du projet collectif*). Among these traditions, Stora judges communism and anti-colonialism as the most important, while several historians suggest anti-fascism should be included in this category - at least in the very distinctive case of after-war France - since its organic component is the historical myth of universal and unitary national resistance against German occupation forces and the collaboration of only a small part of the political regime, the intelligentsia, the army and the police force.

The collapse of master ideological traditions, bearing the qualities of a radical disenchantment and value crisis, conducing to the political-ideological "retirement" of the masses, is deepened by the economic crisis and the disruption of social ties[10], compensatingly driving large or small social groups to internalize a self-image of "negative uniqueness", that is, to seek the warmth and the security offered by the obsession with roots, communitarianism and an invented closed identity and tradition (religious, political, national, victim, sexual, etc.: tribalization), centered at the memory of sufferings or their singularity, under the often disguised concept of the chosen collective subject, as well as the scapegoat of History (Stora, 2008 pp.40 - 43, 53, 65). A field of victim-centered, antagonistic, superseding anti-memories is thus created, conflicting with the official state memory as well as with each other, and while they actually expand the range of readings and conceptual schemes of the past, at the same time they exceedingly fragment, relativize and instrumentalize historical meaning (competitive victimology).

3.   Tzvetan Todorov, in *The Fear of the Barbarians [Ο Φόβος των Βαρβάρων]*, Greek translation by Giorgos Karambelas. Polis, Athens, 2009, p.110, points out that collective memory has undergone a transformation, since victims and not heroes become the principal center of attention, and injustices become more important than achievements.

4.   The juridical concept of "crimes against humanity" first appeared in 1915 concerning the Turkish state's attempt of genocide against Armenians.

5.   Benjamin Stora, *La guerre de mémoires. La France face à son passé colonial*, Editions de l'aube, Paris 2008. Also see Luigi Cajani, "Historians between Memory Wars and Criminal Laws. The Case of the European Union", op.cit., pp.39 - 55; Eric Weitz, *A Century of Genocide. Utopias of Race and Nation*, Princeton University Press, Princeton 2003; Charles Maier, "Consigning the Twentieth Century to History p. Alternative Narratives for the Modern Era", *The American Historical Review*, 105 (2000), pp.807-831; Jeffrey Herf, *Divided Memory. The Nazi Past in the Two Germanys*, Harvard University Press, Cambridge, Massachusetts - London 1997; Henry Rousso (ed.), *Stalinisme et nazisme. Histoire et mémoire comparées*, Collection "Histoire du temps présent", Editions Complexe - IHTP/CNRS, Paris 1999 ; Takashi Yoshida, *The Making of the "Rape of Nanking". History and Memory in Japan, China, and the United States*, Oxford University Press, New York 2006.

6.   Benjamin Stora, "Préface. La France et "ses" guerres de mémoires, in p.Pascal Blanchard - Isabelle Veyrat-Masson (eds), *Les guerres de mémoires. La France et son histoire. Enjeux politiques, controverses historiques, stratégies médiatiques*, La Découverte, Paris 2008, pp.8, 12. Also see Susan Rubin Suleiman, *Crises of Memory and the Second World War*, Harvard University Press, Cambridge Massachusetts and London 2008, pp.1, 5. According to Pierre Nora, "The Reasons for the Current Upsurge in Memory", *Transit. Europäische Revue*, Tr@nsit online, Nr 22/2002. Available online at: http p.//www.jwm.at/index.php?option=comcontent&task=view&id=285&Itemid=463, the "era of memory" was accumulatively established by four successive waves associated with the following historical facts1. the fall of the Berlin Wall and the collapse of real socialism; 2. the fall of dictatorships in Latin America, 3. the overthrow of Apartheid in South Africa; and 4. the very arrival of the 21st century.

7.   The EU Council of Ministers instituted (April 19 - 21, 2007) a framework to combat racism and xenophobia, in particular actions undermining democratic legitimacy. It holds member-states responsible to penalize "[p]ublicly inciting to violence or hatred , even by dissemination or distribution of tracts, pictures or other material, directed against a group of persons or a member of such a group". In the name of discrediting the negation of Holocaust, this text indirectly attacks, according to several European historians, historical research and the freedom of speech. See Réunion du Conseil Justice et Affaires Interiéres de l' Union Européenne, Louxembourg, April 19 - 21, 2007, No 8364/07. The text is available at the site of Network of Concerned Historians, Resources, op.cit. About the negation of Holocaust, see p.Michael Shermer & Alex Grobman, *Denying History. Who says the Holocaust never happened and why do they say it?*, University of California Press, Berkeley/Los Angeles/London 2002; Stephen E. Atkins, *Holocaust Denial as an International Movement*, Praeger, Westport, Connecticut/London 2009; Michel Dreyfus, *L'antisémitisme à gauche. Histoire d'un paradoxe, de 1830 à nos jours*, La Découverte, Paris 2009, pp.215 - 290.

8.   Richard Evans, among others, is radically opposed to history's replacement by memory. See "On the Current State of History", in p.Donald A. Yerxa (ed.), *Recent Themes in Historical Thinking. Historians in Conversation*. The University of South Carolina Press, Columbia, South Carolina 2008, p.26.

9.   For example, Turkey's refusal to recognize the Armenian genocide undermines its integration into the European Union's institutions. See Taner Akçam, *From Empire to Republic p. Turkish Nationalism and the Armenian Genocide*, Zed Books, London 2004. About contemporary wars of memory, see Hagen Fleischer, *Wars of Memory. WWII in Public History [Οι Πόλεμοι της Μνήμης. Ο Β΄ Παγκόσμιος Πόλεμος στη Δημόσια Ιστορία]*, Nepheli, Athens 2008. Also, Pascal Blanchard - Marc Ferro - Isabelle Veyrat-Masson (eds), *Les guerres de mémoires dans le monde*. Hermès-CNRS Editions, Paris 2008. About the representations of memory wars in school textbooks, see Giuliano Procacci, *La memoria controversa. Revisionismi, nazionalismi e fondamentalismi nei manuali di storia*, AM&D Edizioni, Cagliari 2003; Eric Langenbacher and Yossi Shain (2010) *Power and the Past. Collective Memory and International Relations* Washington D.C., Georgetown Univerity Press. About the moral dimension of memory from a philosophical point of vies, see Jeffrey Blustein, *The Moral Demands of Memory*, Cambridge University Press, New York 2008. Finally, a remarkable interdisciplinary panorama of memory studies is p.Astrid Erll and Ansgar Nünning (in collaboration with Sara B. Young), *Cultural Memory Studies. An International and Interdisciplinary Handbook*, Walter de Gruyter, Berlin and New York 2008

10.   In France, contemporary fixation on the negative memory of Vichy and the Holocaust is evidently related, among other things, to the prolonged crisis of French society because of the country's serious financial problems and the legitimization crisis of its political system due to the unsatisfactory management of cultural difference and social justice issues, pushing large masses of mainly young people of the Parisian suburbs to the margin. See Richard J. Golsan, "The Legacy of World War II in France p.Mapping the Discourses of Memory", in Richard Ned Lebow - Wulf Kansteiner - Claudio Fogu (eds), *The Politics of Memory in Postwar Europe*, Duke University Press, Durham and London 2006, p.76. Also see Susan Rubin Suleiman, op.cit., where the first four parts are about postwar France.

History textbooks are increasingly becoming an advantageous field of this socio-political and cultural conflict. Research findings show that in the typical case of the last decade's French school historiography it is obvious what is at stake for collective memory as well as the controversy of incompatible historical memories (of victimizers and victims or just victims)[11] and the desperate attempt of curriculum planners and book writers to mitigate oppositional memories and ideological overtones, rejecting the mechanistic and compensatory juxtaposition justifying particularistic-communitarian readings of victimized groups, leading to epistemological and value relativism (Falaise and Lantheaume, 2008 p.185 - 186). A similar expulsion is taking place at the level of international politics, where contrary memories or mutual recognitions of genocides or even attempts to assign to controversial historical facts the status of ethnic cleansing or genocide are being negotiated.

For all the increasing judicialization of the diverging view and the institution of strict mnemonic law at the nation-state or supranational level, the stake can not and should not be other than the final reconciliation of memories, even if that sounds utopian or unrealistic; reconciliation is the condition of creative coexistence, not in the name of tolerance, but in the name of historical truth, mutual understanding and, less critically, in the name of historical justice. This reconciliation can not be fulfilled if historical traumas and controversial issues are not systematically, collectively worked through with a triple aim: recognition of the complexity of historical phenomena, understanding of difference and other viewpoints, but, ultimately, historical self-understanding.

Recently, Peter Seixas (Seixas, 2004 pp.3 - 20) emphatically argued that, if historical education has any meaning at all in our hard times, this meaning is derived from two possibilities, the realization of which critically contributes to the construction of historical thought:

1. Through the multi-perspective comparison of historical sources, methodological approaches and hermeneutical versions, as well as social and ideological-political uses of the past; in other words, through the understanding of the epistemological context, the historiographic determinants, the methodological and conceptual tools, and the social function of the past's reconstructions and resignifications, students can form a reasonable, substantiated, responsible personal view about historical facts and thus an awareness of co-responsibility for the present and the future.

2. The students' effective contact with the rich and diverse tradition of New History and the understanding of the important of the past's holistic and multi-perspective conception can function as a mechanism of transgression of conventional readings of history (normative ethnocentric narratives "immaterializing" controversies and emphasizing political/military history, as well as the role of leaderships), an element that in its turn can significantly contribute to the examination of the forces of historical course and the confrontational networks consisting social dynamics (Lamont, 1998 p.viii.).

This prospect, accommodated, according to Seixas, by a historically unprecedented situation of rapid changes, uncertainty and structural instability governing the postmodern condition, could undermine the self-complacency of student indifference for the past - mainly the controversial past - an attitude resulting from their inability to understand the ontological dimension of multiple and often contrary readings of the past; furthermore, an attitude leading either to a postmodern-like and possibly "politically correct" equalization of all views and thus to an easy radical, but still naive epistemological and value relativism, that is, to value nihilism and the very loss of historical meaning, or the adoption of simplifying, essentialized, one-dimensional research schemes (naive positivism/realism) obscuring or alternately exalting the complex historical reality, embracing dominant ideology and the interests of the sovereign ethnic-cultural population group, as well as the intellectual and ideological practice of strategic essentialism (Lévesque, 2008).

In agreement with Seixas, I find both possibilities/strategic choices, the implementation of which forms the field of the founding of historical thought onto historical education, realizable through constant, systematic, multi-perspective, and scientifically and pedagogically credible treatment of traumatic[12] and controversial historical facts usually related to national myths and defeats, civil wars, mass slaughters, genocides or the Holocaust, dictatorships or totalitarianisms and, finally, to slavery, colonialism and imperialism.

That is, facts and situations that nation-states want to erase from collective memory (Judt, 2005 p.6). Suppression of these facts, usually leading to a sudden reemergence in collective memory or the fixation of historical consciousness on a haunting past that becomes an "eternal present", causes serious distortions in the conception of the past.

A similar pathogenesis results from those historical facts or processes that societies disguise as taboos, i.e. historical facts that collective memory, dominant ideology and the normative national narrative push into oblivion through explicit or implicit practices of historical amnesia. In general, we are referring to those historical facts judged as unfitting for political morality and the historical education of youth[13], precisely because they are considered controversial, since they produce conflicting readings of the past and constitute "divided memories", having condensed antithetical volitional aims and experiences of antagonistic collective subjects (winners and losers, victimizers and victims), of local societies or even individual historical actors.

The painful, but necessary, in our view, recovery of tragic, horrid or singularly repulsive historical facts from the "hospitable" depths of deliberate oblivion (usually from the part of the winners or the victimizers) and, above all, the examination of their causes, their multi-perspective investigation and conditional imputation of liabilities (when they do not originate, of course, from the duty of memory and do not lead to retrospective penalization of the past and historical anachronism), in the context of critical historiography and, subsequently, of the school subject of History, that is, social visibility, historization and public examination of collective traumas, should represent one of the fundamental practices of forming a critical and reflective historical thought and awareness and, at the same time, a preferential field of forging a democratic political education.

Moreover, if the traumatic or controversial historical fact is linguistically expressed, described, analyzed and narrativized, then the person or the group bearing the traumatic or divided memory, wavering between total identification with the traumatic past and the necessity of critical detachment and integration of the traumatic or controversial fact into its historical context, gradually becomes more able to control the obsessive intrusion of the past into the present, mentally and psychically process the dark pages or "black holes" of personal history. That is, the construction of a will to process the historical trauma functions as a conductor of formation of a consciousness flow with the aim to critically and historically integrate the past into the present (LaCapra, 2001 p.90).

Generally speaking, recollection of sufferings by victim groups, their official recognition and repentance from the part either of state authorities or individual victimizers and the like-minded, inclusion of negative facts within the canon of official history, as well as the construction of monuments, museums and memorial sights or the institution of relevant ceremonies and anniversaries is - in today's context - but the expected form of symbolic atonement for historical injustice (Blustein, 2008 p.166).

At the same time, though, and under certain conditions, this inclusion into the canon could also function as a collective commitment towards drastically fighting forms of domination and intolerance, on the one hand, and deterring similar facts in the future, on the other. This commitment shows that the politics of memory for the victims of history would not be of significance or effect if they are not in the spirit of a "morality of memory" inscribing the traumatic past in the dynamics of experiential immediacy, as well as the expectations horizon of a pluralistic society's members.

LaCapra has pointed out that there are two possible dangers lurking in the historiographic or didactic approach of controversial and traumatic historical facts, like the Holocaust. The first danger concerns the essentialist illusion of their positivistic representation on the basis of fetishized and unchallengeable "proof", that is, denying to construct appropriate and historicized contexts of meaning facilitating the understanding of multiple filters interjected between the historical fact and its narrative reconstruction. This is an epistemological choice lapsing into the objectification of a variedly mediated historical reality, since it deliberately suppresses the nature and limits of primary and secondary materials with which reality is constructed each time. LaCapra considers Raul Hilberg's significant book *The Destruction of the European Jews* (First Edition 1961) as a typical example of the Holocaust's objectified approach, where objectification results from the writer's methodological choice to turn his research scope not to the victims' and the survivors' testimonies, but rather to historical sources representing the victimizers' viewpoint, thus transforming the industrially and bureaucratically organized genocidal psychosis of German national socialism into an incontestable historical reality (LaCapra, 2001 pp.99 - 100).

LaCapra sees the counterpoint to this objectifying, but at the same time, to make sure, historiographically credible approach of Hilberg, in Daniel Goldhagen's *Hitler's Willing Executioners* (Goldhagen, 1996), raising a twofold argument: on the one hand, the writer's extreme identification with the victims, a methodological choice evoking the passive or blind historical empathy, that is, absolute and unmediated identification (LaCapra, 2001 p.120); on the other hand, the adoption of a prefabricated and manicheistic explanatory scheme not responding to the availability of historical sources (LaCapra, 2001 p.100). LaCapra notes that, even if Goldhagen aims at a thick description of the victims' world, in reality he often lapses into the reconstruction of their experiences, principally by identifying with them, as he himself imagines them and as they perceived their victimizers[14].

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11. Jean-Michel Chaumont, *La concurrence des victimes p.génocide, identité, reconnaissance*, La Découverte, Paris 1997. The book's title is almost prophetic, describing today's generalized pathogeny of the fragmentation of nation-state's historical memory, once unified and normative, but still selective to start with.

12. In his Freudian approach, Dominick LaCapra defines trauma as an experience of the subject's disembodiment, leading to existential hard to control and heal. Dominick LaCapra, *Writing History, Writing Trauma*, Johns Hopkins University Press, Baltimore 2001, pp.41, 81- 82. Michel de Certau's analysis is very close to LaCapra's. Michel de Certau, *Histoire et psychanalyse entre science et fiction*. Gallimard, Paris 2002.

13. For the theoretical context of this issue, see Paul Ricœur, *La mémoire, l' histoire, l' oubli*. Gallimard, Paris 2000; also, Dominick LaCapra, *Writing History, Writing Trauma*, op.cit.

14. LaCapra, op.cit., p.120. The writer attempts to explain the array of understandings formed by common readers and intellectuals concerning Goldhagen's book. For example, S. Schama & J. Habermas praised it, mainly because it kept this grave case open, but their assessment does not take into account the deficit of research and the writer's narrow viewpoint

This second form of objectification, much trickier than the former, is, according to LaCapra, particularly thorny when it is based on visual material on the Holocaust (pictures and newsreels), which further creates, because of the image's immediacy, an easy illusion of unmediated submersion into the hard core of historical facts, activating a secondary danger: the reconstruction of the viewer's self, his or her moral and emotional breakdown, particularly that of the children and the youth, in the sight of the unprecedented crudity of the visual impression that can cause a derivative traumatic or victimized historical consciousness (LaCapra, 2001 p.101 - 102). Evidently, the comparative and counterpointal access to incompatible or sometimes intersecting viewpoints of the victims *and* the victimizers ensures, at least at the level of methodological principles, the most comprehensive possible reconstruction of multiple or even oppositional aspects of historical reality.

The second class of dangers is related to the idealization of a complex and multifaceted historical reality resulting from the unsubstantial reconcilement of antithetical and mutually exclusive experiences and viewpoints or from overemphasizing isolated facts that are - in a principally indirect way - presumed as indicative cases. An example of this kind of approach is Steven Spielberg's film *Schindler's List* (La Capra, 2001 p.99).

Insisting on the multiple expedience of including controversial and traumatic historical facts into the canon of school historiography does not mean we aim at generating a condition of divisive historical hypermnesia. We obviously accept Erest Renan's argument (*"What is a Nation?"*) that the existence of nation-state presupposes not just the constitution of bonds and common references, like collective memory, but also the will and the ability to transcend differences, selective oblivion and repentance, to the extent that the socio-political national division in times of conflict and crisis is not so deep that it would rule out the possibility of a fundamental consensual context for approaching the past (Judt, 2005 p.5). We also accept the validity of Nietzsche's warning that innovative historical action, necessarily extending in the horizon of the present and the future, is not possible without the requisite oblivion of certain aspects and facts of the past paralyzing societies and their historical creativity (Blustein, 2008 pp.5 - 15). The above mentioned support the view of French anthropologist Marc Augé that the task of memory creates a social pathogeny if not in a dialectical relation with the task of oblivion (Suleiman, 2008 pp.216, 224).

The effectiveness of a historical learning process focusing on traumatic and controversial historical facts is not incompatible, at least according to the findings of recent influential studies, with the perceptual ability of children. Peter Lee and Rosalyn Ashby showed that students between the ages 7 and 14, when confronted with diverging, contrary or mutually excluding historical sources and testimonies about the past, can conditionally understand that partial or radical differences in the experiencing, representation and interpretation of historical reality are related (1) in the case of primary sources, to the position, the relevance, the ideological orientation and the conscious or unconscious choices of their authors, while (2) in the case of secondary sources, to the interpretative context where they are inscribed, as well as to the epistemological, methodological and ideological assumptions of their authors.

The skill to understand and explain the multiplicity and diversity of historical sources, a structural element of historical thought, may be related, to an extent, to student age, intellectual level and social/cultural background. Nevertheless, the extent of correlation is not decisive, since individual variations - either in regard to age or across a student sample - are statistically (quality- and quantity-wise) significant, acquired historical skills not indicating a further development of student historical thought. According to P. Lee and R. Ashby, the most determinant factor for understanding historicity, diversity and experiential and interpretative divergence of historical sources is the autonomy, the systemization and the coherence of the learning procedure, that is, the consistence, the quality and quantity of creative stimuli offered to students. In other words, multiple learning motives, principally within the school environment.[15]

Bruce VanSledright's findings are similar (VanSledright, 2002). VanSledright found that, when students aged 10 - 11 are confronted with controversial historical facts of a past interpreted diversely or even in contradictory ways, they attempt, at least initially, a "heroic escape" from the onerous problematization of the historical past. More specifically, they choose to overcome their perplexity by adopting the dominant view, that is, the view dictated by the dominant ideology and the normative national sentiment and narrative, the fixed collective memory or the self-understanding of ethic/racial/minority group, further sanctioning their view by reference to authoritative epistemological assumptions of a naive positivism identifying historical reality and historical interpretation (referential illusion). In other cases, though, students function contrary to the essentialist illusion, resorting to the interpretative strategy of radical cognitive relativism, the very impossibility of historical knowledge, an attitude leading to the indeterminacy of historical meaning and nihilism, that is, the devaluation of the past in relation to the present.

However, according to VanSledright, the subsequent activation of factors such as methodical History instruction, gradual initiation to epistemological considerations about the nature, the research methods, the representation techniques and the social functions of historical discourse, learning the techniques of decoding, comparing and critically analyzing historical sources or, generally, shaping of historical skills, tends to radically change the unfamiliar learning landscape, the initial state of ostentatious indifference, stress and irritation in view of a complex historical understanding and interpretation, functioning as a foundation for the structuring of a substantiated, reasonable, responsible and independent historical thought (VanSledright, 2002; Lévesque, 2008 p.130).

Constructing an overall context, we would suggest that any contemporary didactic management of controversial and traumatic or taboo historical facts should overcome the following six obstacles:

a) Acceptance of collective guilt and collective liability,

b) Manicheist oversimplification of historical facts,

c) Bipolar, racist, moralistic or quantitative interpretation (whites against blacks, bad guys against good guys, few against many, victimizers against victims, winners against losers),

d) Apologetic interpretation of the collective victimizer,

e) Self-vindicating interpretation from the part of the victim and,

f) Imprecise and disproportional historical comparisons masking political-ideological expediencies or functioning as vehicles of state cultural diplomacy, for example Holocaust = genocides = ethnic cleansings = slave trade, etc.

Generally speaking, we must avoid and deconstruct the main two forms of therapeutic/over-replacing instrumentalization of historical discourse: its exculpatory form, with an ideological function to vindicate the winners and victimizers, justify their choices and legitimize the *status quo*, as well as its compensatory form, which, sometimes despite its own historical truth, reverses the idealizing strategy of the victimizer into a moral superiority of the victim, with the specific aim to empower the self-image of the oppressed, persecuted and victimized group (Schlesinger, 1998 pp.54 - 58).

Roger Simon (Simon, 2005) proposes a didactic approach within a reference context shaped by the thought of Walter Benjamin, Emmanuel Levinas, Jacques Derrida, Homi Bhabba and Henri A. Giroux. His original, radical form of a critical pedagogy of memory conceptualizing historical knowledge as a social right and collective good has its roots in French theory, although the influence by cultural and post-colonial studies is also strong (Den Heyer, 2004 p. 202).

Contesting not so much the definition but rather the ontogenetic typology of historical consciousness proposed by German theorist of history Jörn Rüsen, Simon defines historical consciousness as a dynamic relation of past, present and future; more specifically, as a form of moral awareness, individual and collective skills and sensibilities leading us to seek the meaning of the past (significations practice) and encouraging us to recover traces-signs of the past into our present (texts, material residues, artifacts, pictures, oral testimonies, etc.); these traces arrive "demanding something of us" asking to be decoded so that their hidden meanings can emerge, without reduction to broader conceptual frameworks, i.e., the formation of a sense of entity or intuition, always being possible or even necessary (Den Heyer, 2004 p. 203).

Simon believes that primary historical sources are not just organized or fragmentary constellations of historical data. On the contrary, despite multiple mediations latent in historical communication at every level, primary sources embody life worlds and constitute webs of manifold meanings and experiential courses (Simon, 2004 p.189). By crossing these webs, we are permeating temporal-spatial borders, submerging into the experience of people in the past: we are listening to their plural but often suppressed voices, giving them space within our own intellectual and psychological system, our own historical culture and consciousness (Simon, 2004 p.189)

Following Walter Benjamin, who pointed out 20th century people's increasing disability to experience the (hi)stories of others, considering this as a symptom of late modernity's pathology (Simon, 2004 p.189), as well as Sam Wineburg, who suggests that history is an antidote to people's existential inability to understand the difference of the past, being thus a way of cultivating one's sensibilities for the past, as well as an awareness of our insufficient tools to understand it (Den Heyer, 2004 p. 207), Simon suggests as a method of student initiation and exercise in history precisely the thing that the conventional approach to School History, because of expediencies and practices of a closed ethnocentric education, squarely rejects: a critical pedagogy of memory, a poetic fusion of horizons, the most immediate contact of the present with the past's complexity and multi-layered nature, that can be realized mainly based on primary historical material without excluding the supplementary use of secondary sources[16].

15. Peter Lee and Rosalyn Ashby, "Progression in Historical Understanding among Students Ages 7 - 14", in p.Peter N. Stearns - Peter Seixas - Sam Wineburg (eds), *Knowing, Teaching and Learning History. National and International Perspectives*. New York University Press, New York - London 2000, pp.199 - 222; Peter Lee, "Approaching the concept of historical education", Greek translation by Irini Nakou, in p.Giorgos Kokkkinos and Irini Nakou (eds) p. *Approaching historical education in the beginning of the 21st century* [*Προσεγγίζοντας την ιστορική εκπαίδευση στις αρχές του 21ου αιώνα*], Metaixmio, Athens 2006, pp.37 - 71; Rosalyn Ashby, "Contradictory Information. How Students Approach Historical Sources and understand Historical Testimonies", in p.Giorgos Kokkinos, op.cit., pp.201 - 236

16. According to Claudia Eppert, a member of Simon's research group, "Remembering Obligation p.Witnessing Testimonies of Historical Trauma", in p.Simon, 2005, op.cit., p.50, immediate testimony and secondary historical sources allow, in Simon's theory, access to the experiential core of controversial and traumatic facts, morally claiming historical understanding and the transgression of past pathologies.

It is not just any past, but rather the "sensitive", painful, traumatic and controversial past exorcised by dominant ideology and the official national narrative, because its immersion in collective memory and the historiographic canon can reveal historicity, conflictuality, multiplicity and alternative possibilities of History as an experience as well as interpretation, deactivating collective myths, contesting commonplaces and preconceptions, historicizing various mediations and de-essentializing fixed normative interpretations of the past.

According to Simon (Simon, 2005 p.189), disciplineship in history is a systematic intellectual and moral apparatus facilitating familiarization with forms of historical diversity, not just in the sense of their integration into a more comprehensive and democratic historical narrative, but also in the sense of a continuous availability for communication with difference, either in relation to "Others" or in regard to multiple layers and internal contradictions of the very collective self.

Simon (Simon, 2005 p.190) suggests that transgression of hyper-information and the sentiment of postmodern fragmentation, escape from the closed horizons of the presentistic status of historicity, the opening to the universality of historical experience, the affirmation of mutual translation of cultural systems, is possible. Under this scope, he defines historical awareness not as an intellectual state, but rather as a social praxis, a total of historically determined practices of the revocation of the past. That is, his approach is "praxiological" (Simon, 2005 p.190).

This exploratory and necessarily empathetic involvement in the clarification of "dark" historical facts and hidden aspects of historical reality (Simon mentions the examples of slave trade, racial persecution of Afro-Americans, the annihilation of Indians, the Armenian genocide, the Nanking Massacre, the Holocaust, the apartheid of South Africa, the genocide in Cambodia by Pol Pot, the ethic cleansing in former Yugoslavia, the annihilation of native people in Guatemala, the annihilation of the Tutsi by the Hutu in Rwanda) (Simon, 2004 pp.185 - 186) facilitates the transgression of spatial-temporal constraints of the present and the unhistorical indifference for the past, opposes intentional oblivion, makes aware of certain groups' sufferings and their causes. It is, in a sense, an intellectual practice of resistance to ideological manipulation, taking the form of the resurrection of the forgotten, beaten and powerless of History, which is not an end in itself, though, since it does not keep to a retrospective justice, nor does it aim at "dramaticizing pain", but rather attempts to make us aware, in terms of a categorical imperative, of the need to break the vicious circle of a perpetual recurrence of the "victim-victimizer" relation and reconcile with suppressed aspects of the past, subjugating the antagonism to the common effort for a better future (Simon, 2004 pp.186,190).

Such an approach makes history a field of constitution of a new sociopolitical responsibility and public morality that, while processing the past in historical as well as moral terms, it does not keep to the task of memory ("I don't forget"), but rather transforms the bitter taste of the past into a power of understanding inequalities, conflicts and antinomies, on the one hand, and into a creative force for the future, on the other. In this sense, the past as an "absent presence" (Simon, 2004 p.187) does not haunt the present, but rather reconciles us with its ghosts, as well as the prevalent and multiplying diversity, also making us aware of the gaps and the blind spots of our own identity and historical reading.

Ultimately, the ability to ask, to listen, to narrate the multiple diversity of the past and your own suppressed or unconscious difference, undermining your self-referentiality, is a particular way of critical, reflective and unconventional thought resulting to the very idea and experience of democracy (Simon, 2004 pp.191 - 197). If, as Simon argues, ignorance and the ignorance of ignorance is not just an ideologically, socially and culturally determined condition, but rather an unconscious structure of resistance to knowledge (Simon, 2004 p.196) then historical education and culture contesting and delegitimizing it within the public sphere decisively contributes to the reformation of public memory, shaping sounder forms of historical consciousness, but less inflexible identities (Simon, 2004 pp.197 - 199).

Simon pays special attention to memory and its social reproduction, since he is convinced that its horizon is not the past or the fluid and transitional present, but rather the future. He does not approach social memory in the one-dimensional sense of rituals, images, emotions and narrative practices of shaping and internalizing collective identity and excluding difference for the public sphere, but rather in the sense of a consensual condition and disciplineship enabling democratic coexistence, mutual understanding and deliberation. This presupposes and at the same time promotes transgression of partialities, after historical understanding from the inside and the outside has been realized and the awareness of universality has been reached, stemming from the values of justice and solidarity, the awareness of interdependence of individuals, social classes, nation-states and cultures, as well as from the will of coexisting with people with different cultural and ethnic backgrounds and, of course, maintaining social unity (Simon, 2005 pp.2 - 3, 5, 8).

Transgression of a painful or haunted past dividing and feeding intolerance is obviously not an issue to be taken lightly and does not presuppose forgetting the past in the name of a peaceful present.

On the contrary, it needs the multidimensional memory of the past in different terms: not just the recognition of responsibility and the will of repentance and compensation, but also - and more critically - the shaping of a "historical imaginary" allowing the reflection of practices establishing structures of violence, injustice, inequality, domination, exploitation and negation of group and individual differences, inside and outside the borders of nation-states, and familiarizing us with the multiple diversity of the historical world, on the one hand, alienating us from the closed horizon of our identity, the prison of partiality, on the other hand (Simon, 2005 p.9).

Simon (Simon, 2005 p.114) attempts to give an answer to the question "how can we constitute a lively relation to the past?" and apply alternative practices of memory references to the past. A past that, as he argues, must remain alive so that people's historical creativity does not exhaust itself. We have a task to listen to the plural voices of the past, reflect on unrealized possibilities in it, such as the moral superiority of the beaten. If the past is kept alive and multidimensional, then the present necessarily remains open to possibilities, while the hope for a better future is also kept alive, not in the sense of a progress-centered rationality neither in the sense of an abstract eschatological, salvation-promising prospect (Simon, 2005 p.112).

Access to multiple and hidden aspects of the past is obtained by permeance into diverse, primary historical material, not so much for epistemological or methodological reasons of historical intuition, multi-perspectivity and objectivity, but rather from a sense of responsibility to people of the past who, by remaining silent, cause a false and artificially homogenous and coherent image of their world, essentializing and legitimizing the very present while restricting or shrinking the horizon of its expectations. Every re-inscription of historical sources and testimonies into the present, every revelation of significant details, creates new possibilities of understanding and interpreting the past and the present, helping us to contest established interpretations, to reflect on the conditions and limits of the past's representation and seek new links of the past to the present and the future (Simon, 2005 pp.106, 113 - 114).

Simon and his research team transform this theoretical claim into a specific practice of inquiry and instruction. Their principal aim is not historical understanding in general, but rather the reduction of cognitive subject to the unknown and singular experience of the "other" through the imaginary re-living of actual and particular historical conditions, further shaping a learning environment for the students appropriate for the challenge of "simulations" which are not passive, that is, bound to the past, emotional and moral reactions. This choice does not presuppose identification with people of the past. On the contrary, it is based on the awareness that exposure to primary experiences of the "other" is practically impossible, even if it is desirable. Nevertheless, inclusion of primary historical testimony into appropriately and *ad hoc* designed, organized school environments is not automatic or casual; it presupposes requires respect to methodological principles, rules and practices established by the discipline's community. It also requires the cognitive and moral availability of people today, their will to feel the past to render retrospective historical justice through the interception of the socio-politically and epistemologically determined process of oblivion, as well as their awareness of their own responsibility for similar facts in the present, and their commitment to the vision of changing the world (Eppert, 2005 pp.53 - 54).

Simon's methodological approach attempts to cognitively, emotionally and morally startle the students in order to distance them from the limited horizon of their spatial-temporal references and initiate them to strategically chosen aspects of the past, that is, to activate their availability in understanding diversity, more particularly the traumatic and controversial historical reality as it was experienced by different individuals and groups. The simultaneous distancing of students from the present and their contact with different experienced aspects of the traumatic and controversial past is realized with the juxtaposition of chosen testimonies and several kinds of historical sources as a link where an object or something characteristic function to leave a memory trace, a memory-image, discouraging oblivion, full of meaning, easily recalled, while encapsulating the very structural elements of the historical era or the fact under study.

This pictorial memory trace does not refer to a process of passive reception of the past or historical empathy; it is of a dynamic nature and motivates to intellectual, moral, political mindfulness, commitment and action activated with the discovery of unexploited possibilities hidden in the past and the present. Under this light, critical study of the past, particularly that of controversial and traumatic historical facts, as they are experienced by different individuals or collectivities, is transformed into a skill of decoding the meaning of the present, into historical creativity, will and fighting spirit in view of the future (Simon *et al.*, 2005 pp.104 - 131).

The multi-perspective study of derivative historical trauma that students may experience through their contact with the dark world of primary trauma may conditionally become the starting point of a redesignation of an individual, since the transgression of secondary traumatic experience is only possible as a conscious re-inscription of the meaning of the primary trauma into a new experiential and interpretative context, as a signifying practice removing the past's pathology and transforming its heavy burden into historical self-awareness and creativity (Eppert, 2005 pp.51 - 51,54 - 55).

## Conclusion

As Elizabeth A. Cole notes, at the turn of the first decade of the 21st century, we are finally equipped with the appropriate moral, theoretical, conceptual and cognitive capital - along with the legal prerequisites - to manage traumatic memory and the transgression of dividing lines, conflicts and mainly borderline facts (tortures, mass rapes, civil wars, loss of national sovereignty, ethnic cleansings, genocides, the Holocaust) (Cole, 2007 p.10). Even if violence is the ontological condition of the very humanity, only the struggle to overcome it or restrict it and thus heal collective traumas and the dominance of a dialogue culture can ensure unity, coherence or peace. A post-conflictual historical consciousness can only be in organic relation to the idea of reconciliation (Cole, 2007 p.1). In reality, as Hannah Arendt argued in 1968, reconciliation "seeks not to restore an imagined moral order that has been violated, but to initiate new relations between members of a polity" (cited by Cole, 2007 p.5) or between states, peoples, races, religions, languages and regimes either involved in an existential struggle of life or death, or caught up in an endless cycle of blood with fixed roles of victim and victimizer.

Reconciliation also does not mean a complete unity of views or a final compromise of two antagonistic, opponent or formerly mutually excluding worlds; it means the release from dividing value starting points and radically diverging interpretative perspectives. Finally, reconciliation does not imply a total amnesia or humiliation of the victimizer and essentialization of this role. However, it could mean the victimizer's apology, actual and avowed repentance, the recognition of injustice and the symbolic or material compensation, the restoration of justice, forgiveness, tolerance, peaceful coexistence, historical awareness, respect of diversity, commitment to a binding context of principles, values and practices. Reconciliation does not imply an ideal situation of harmony at the intrastate or the international level. It marks the will of creative forgetfulness that, however, does not necessitate radical annulment of singular historical experiences, but rather of their function as signifying compasses for the present and the future. Reconciliation, then, must be considered as a long, painful and mutually binding process of collective self-understanding framed by measures of public recognition and vindication of the victims (Cole 2007 p.4).

Two characteristic and correlative cases prove the soundness of this approach: Israel disputed the possibility of reconciliation with Germany, insomuch as the unprecedently traumatic experience of the Holocaust undermines any such attempt. For this reason, and in order to describe the mutually useful relation of trust with the German state, it favoured the neutral and transitory terms of "rapprochement" and "cooperation" (Cole, 2007 p.6). On the other hand, Lily Gardner Feldman's empirical researches showed that educational projects implemented with the initiative of post-war Germany in order to reconcile with formerly conquered peoples, neighbouring states and particularly Israel and the Jewish diaspora, started to show results when the obsession of a final settlement of differences, "mutual love" and "reconcilement" was abandoned in favour of the construction of genuine and actual channels of communication, mutual understanding and recognition of differences (Cole, 2007 p.11).

Nevertheless, there is still an insufficient development in the field of interdisciplinary and comparative approach of relevant issues worldwide - with the exception of the multi-perspective study of the case of post-war West Germany and the attempt to smooth tensions caused by national socialism and the Holocaust - focusing on the relation between historical education - mainly at the secondary level - and traumatic memory; more particularly, significant gaps are observed in the evaluation of designing and implementing educational policies and pedagogical interventions aiming at alleviating or healing the traces of secondary/derivative trauma left by borderline conflicts and violence in the historical consciousness of the new generation (Cole 2007 p.2).

However, this deficit does not mean that transgressing the traumatic and controversial past of a society exclusively depends on the revision of curricula and history school books, since Public History and the informal forms of socialization nowadays claim the lion's share in shaping the historical culture and consciousness of the youth. Therefore, new tools of decoding and explaining historical views of future citizens are needed, as well as more comprehensive educational interventions. At the same time, inclusion of extremely controversial facts, either ideologically/politically or experientially, is judged as vain, if not dangerous, unless teachers have been made aware of particular sensibilities and properly trained, and unless a dynamics of democratization and a context of fundamental political consensus has been shaped, that is, institutional conditions of substantial dialogue, as well as conditions allowing collective deliberations at the level of "middle democracy", according to the terminology of Amy Gutmann and Dennis Thompson. This term describes the dynamics of "everyday politics", the involvement of civil society, lobbies, memory communities and social actors within the public sphere. In other words, the school, particularly the subject of history, can not be assigned to function as an independent actor of re-signifying a society's historical views, if this society is not ready to look at its reflection in the mirror, if it still considers historical education as a channel of historical and ideological correction and instillation of uncontested and value-free truths (Cole, 2007 pp.16,18).

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# Reinventing The Places We Inhabit: Teachers "Reading" Place-Based History

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*Abstract - This study investigates how history teachers' travel experiences in a "place-conscious" professional development program influenced their perceptions of their region as both historically unique and deeply connected to other places and to broader national historical narratives. Guided, "feet-on-the-ground," local and translocal experiences with multiple and interconnected places generated conversation about social and political structures and perspectives, economic resources and dependencies, and the social, cultural, and political agency available to and employed by people in one place or another across time. Travel beyond the region heightened attention to the ways in which history is written on the landscape as well as to changing local and translocal contingencies that shape a place. Teachers report that they brought new ideas about place into their history instruction, emphasizing in particular, pattern and variation in regard to cultural development and the exploitation of land and labor.*

*Keywords - Agency, agency - cultural, agency - political, agency - social, Appalachia, Appalachian history, archaeology, archival work, archive pack, concepts - geographical, controversial pasts, digital documentaries, geography, geography - cultural, geography - physical, globalization, historical content, historical methodology - questioning, investigation, evidence, constructivism, historical thinking, history - national, history - regional, history - place-based Holocaust Museum, local history, local, memorials, museums, narratives - national historical, geographical, cultural, Pine Mountain Settlement School, (http://www.pinemountainsettlementschool.com/history.php) place, place-based History, professional development, public spaces, structuration theory, study travel, teachers.*

## Introduction

As a geographical concept, place has an interesting historical trajectory. In the 19th and early 20th centuries geographers in Europe and the United States set out to describe the places their far-flung spheres of influence made available to them. As Willinsky (1998) notes, this geographic project described the world in terms of" borderlines and boundaries… We become adept at identifying the distinguishing features of this country, that culture, those people" (p. 1).Often enough, geographers became "fascinated by the other as well as hostile to it" (Rose, 1993, p.77). Despite considerable contestation, this sense of place as either *other* - exotic, often hostile - or *home* - source of identity and, often, pride - continues in school social studies and particularly in history instruction (Gaudelli & Heilman, 2009). Indeed, U.S. historian C. Vann Woodward (1993) identified attachment to place as a burden of Southern history.

As a considerable scholarship attests, globalization challenges conceptions of home as well as of what counts as other (Appiah, 2006, Barber, 1996; Friedman, 2000, 2002; Gaudelli & Heilman, 2009, Parker, 2003). Appiah (2006), for instance, argues for a cosmopolitanism that roots individuals in "local partialities" but also commits them to a broader human community (p. xvii). In some formulations of the impact of globalization, the perception of diminishing distinctions of place leads groups and individuals to cling more tightly to traditional cultural forms, often insisting that others do likewise. Appiah's (2006) formulation of *cosmopolitanism*, however, argues that this needn't be the case: "[W]e need to develop habits of coexistence: conversation in its older meaning, of living together, association" as well as respect for human diversity in our "home" as well as in other places and to recognize ourselves as a "perpetually voyaging species" constantly reinventing the places we inhabit (pp.x, xxvi). In his view, the multiple and overlapping identities sand obligations characteristic of cosmopolitan living extend public spaces well beyond the immediate location in which one finds oneself. As people share and jointly shape public spaces, the need for dialogue across differences about an evolving common good increases (Barton & Levstik, 2004; Gaudelli & Heilman, 2009; Parker, 2003). Far from rending the fabric of society, such conversations make both "unum and pluribus… interdependent aspects of a vibrant democratic life… " (Parker, 2003, p. xix).

The concept of sharing and shaping multiple and overlapping public spaces for the common good frames the research reported here. More specifically, we are interested in how attention to *historical* connections among places help teachers develop a "global sense of the local" (Massey, 1994, p. 51). As Thomas Friedman (2002) notes, "we all carry around with us a big lens, a big framework, through which we look at the world, order events, and decide what is important and what is not" (p. 3). In terms of national history, the instructional lens often focuses on the middle ground - national patterns - rather than on either global or local connections. Not only can this lead to *global* myopia in a time of increasingly global challenges, it also ignores deep *local* contingencies that connect specific places to national as well as global patterns (Ayers, 2004; Cresswell, 2004).

Structuration theory is useful here as it helps to explain how social structure and social agency come together in different places and mutually influence each other (Castree, 2003; Cresswell, 2004; Giddens, 2003; Massey, 1994).

Arguing that a strong sense of the local and particular may exist beside reflections of other locales in any one place, structuration theorists explain that a place's uniqueness develops in the interplay over time of local and translocal forces (Holloway, Rice, & Valentine, 2003). In this sense, places operate as nodes or switching points in a deeply interconnected system: Any one place may be connected to an array of other places, but social and political structures, economic resources and dependencies, and the social, cultural, and political agency available to and employed by people in one place or another varies in the immediate moment and across time. How individuals experience a place, make sense of its history, or apply that knowledge in shared public places varies, too, depending on individual or group mobility and access, features closely linked to race, ethnicity, gender, and class. At any moment in time, a switching point may accommodate more or less movement between places, and movement may be more or less voluntary. Groups and individuals may experience this movement very differently, too, depending on the social systems and social agencies in play at a given moment. Similarly, exploitation as well as more benign or positive forms of cultural exchange may characterize contact between places.

## Appalachia: A Historical Switching Place

Historically, the Appalachian coalfields of the U.S. represent a particularly complex switching point. Once Europeans settled along the Atlantic coast of North America, the Appalachian Mountains proved a rather porous barrier to further exploration and settlement and a short-lived sanctuary for indigenous inhabitants. Not only did waves of European settlers push through (and beyond) gaps in the mountains, but they pushed the original inhabits of the region ahead of them. As a result, tribes to the west of advancing Europeans settlements struggled to defend traditional homelands, not just against European encroachment, but against eastern tribal groups pushed into their territories (Richter, 2003). Even nineteenth-century Appalachia, often portrayed as an "isolated" and "egalitarian" subsistence farming culture was deeply implicated in larger national economic and social structures, including slavery, the emergence of regional and national markets, and early industrialization. (Pudup, Billings & Waller, 1995; Billings & Blee, 2000)

Later, extractive industries brought new waves of immigration from many parts of the world into Appalachia. Anti-union management pitted different racial, ethnic, religious, and regional groups of workers against each other (Hevener, 2002). Conflicts over unionization and workers' rights pulled in union organizers, management "security" workers and strikebreakers from all over the country. Local and national newspaper coverage focused on the "mine wars" in the region and, at the Battle of Blair Mountain, the government launched air attacks against striking miners (Shogan, 2004).In the twentieth century, war and economic uncertainty sent many Appalachians north to Cincinnati, Columbus, Detroit, Chicago, and other industrial cities. Culture contact, conflict, and exchange continued as out-migrants shuttled between northern cities and their Appalachian home communities (Berry, 2000).

Over time, enormous wealth left the mountains, but some also remained in the hands of local entrepreneurs. Nonetheless, the boom and bust economy typical of extractive industry meant that pockets of poverty persisted in the region. From the late 19th century through the modern era, from the Frontier Nursing Service to rural electrification, from the Johnson administration's "War on Poverty," to the development of regional craft cooperatives, the Appalachian coal-fields became the object of charitable and reform movements, often located in northern urban centers. Outsiders sent money, clothing, food, programs, movie cameras and missionaries as well as advice, regulation and cultural misunderstanding. Even a relatively cursory glance at the history of the region uncovers a complex and often-inequitable pattern of "switching" people, ideas, work and wealth among the coalfields, northern industrial cities and the rest of the nation and world (Buck, 2001; Peacock, Watson, & Matthews, 2005; Weise, 2001). Interestingly, at the beginning of this study, the teacher-participants reported that they experienced their place in Appalachia less as a switching point and more as a spur off to the side of mainstream national history (Levstik & Kern, 2007). The study reported here examines alterations in these perceptions in the context of a place-sensitive history education professional development program.

## The Study

### The Professional Development Program

Two groups of teachers participating in separate but related professional development programs constitute the population for this study. Data was collected for 4 years for each group (Group I: 2002 - 2006; Group II: 2004 - 2008). Each year participants attended a week long summer institute focused on a historical content theme and a historical thinking theme. The first summer institute in each program was held at Pine Mountain Settlement School. Founded in 1913 as a school for children in the region's southeastern mountains, the school is, itself, a switching point, drawing together a local man, William Creech Sr., who donated land and recruited Katherine Pettit of Lexington, Kentucky, and Ethel DeLong, a New Jersey native, to establish and run the settlement school. Mary Rockwell Hook, an architect from Kansas City, designed the campus and buildings and Luigi Zande, an immigrant Italian stonemason, executed those designs (and married Ethel DeLong). Although Pine Mountain initially operated as an independent boarding school, in 1949 it became part of the county school system and remained so until the early 1970s. Designated a national historic landmark, the Settlement now functions as a conference center offering programs in Appalachian culture, and environmental education. In this newer incarnation, Pine Mountain Settlement School continues to operate as a switching point, connecting people and ideas from well beyond its immediate environs.

From its inception, then, the schools' leaders have drawn on people and ideas from the settlement movement, education reform, women's history, experiments in vernacular architecture, patterns of immigration, and environmental and arts and crafts movement in the United States to create a uniquely local and at the same time deeply connected place, embodying the goals of the summer institute (http://www.pinemountainsettlementschool.com/).

Once grounded in a local switching place, the summer institutes moved outward. In the second and third years, Group I (2002 - 2006) went to Washington DC and then to New York City; Group II (2004 - 2008) went first to the Boston area and then to Santa Fe, New Mexico. The fourth and final year marked a return to an Appalachia site.

In addition to the summer institutes, participants attended 3 day autumn and spring seminars. Each seminar combined a content focus with guest speakers expert in Appalachian as well as national history, geography, and archaeology with a historical thinking focus (perspective recognition, changing conceptions of historical significance, historical agency, and narrative and interpretation) as included instructional approaches modeling ways to engage students in historical inquiry.

In some instances, programs began with a local event, and then provided opportunities to make national connections. In other instances, a more distant event provided an opportunity to connect national to local experience. Two parallel activities involving the use of documentaries and source packets/archives provide examples of each approach[1.] As part of an introduction to local/translocal connections, Group I teachers watched the documentary film, *Stranger with a Camera* (Elizabeth Barrett, 2000) produced by Appalshop, a multi-disciplinary arts and education center in the region. *Stranger with a Camera* investigates the circumstances surrounding the 1967 murder of a Canadian filmmaker, Hugh O'Connor, hired, in part, to document the region where President Johnson declared a "War on Poverty" in 1964. While filming in Letcher County, Kentucky, a local landowner, Hobart Ison, confronted O'Connor, ordering him off the land and away from Ison's tenants. During the verbal exchange that followed, Ison shot and killed O'Connor. In documenting this incident, Barrett explains that she "came to see that there was a complex relationship between social action and social embarrassment" and wonders if "filmmakers [can] show poverty without shaming the people we portray?" (http://www.itvs.org/strangerwithacamera/story.html).

The film provoked considerable discussion and debate among the teacher-participants and produced a lively "retrospective" on the events surrounding the murder. Using *portable archives* (packets of relevant sources), the teachers researched the perspectives of participants, and read witnesses' accounts as well as local and national commentary. Afterwards, some took on the perspectives of historical actors still living in the region while others acted as historians or reporters investigating the impact of the incident on the community and on national perceptions of the region (Kern, 2002).

Group II teachers also viewed a film, but rather than begin with a local incident, they watched the documentary, *The Johnstown Flood* (Guggenheim, 1989). They, too, used portable archives to investigate the impact of this event on the community and on national perceptions of the Johnstown region. In the follow-up discussion, teacher-participants considered how blame was shifted from the industrialists who owned the faulty dam to Eastern European immigrants who were accused of stealing from and otherwise violating the bodies of flood victims. Parallels to mining and flood disasters in Appalachia drew immediate comparison, focusing on the mountain-top removal that could be seen just down the road, as well as on state legislators' and business leaders' responses to mining-related flooding, mudslides and environmental problems.

Guest speakers, supported by historical book sets distributed to participants (APPENDIX B, p. 74), reinforced the local/translocal connections introduced in the films. Teachers might read different historians' account of national patterns, but they also interviewed local participants in related events, and took walking tours guided by historical preservation experts and historians who pointed out how the operations of local and translocal social systems and social agency could be identified in the built and natural environments. Guides pointed out multidirectional and multicultural patterns of settlement, culture contact and conflict, changing conceptions of governance, and the differential impact of industrialization on each place visited during the 4 years of both programs.

Each year of each program, too, teacher-participants developed a project that represented local/translocal connections and could be adapted to their classrooms. In first year projects teachers formulated and then investigated a historical question connected to their own community. One teacher, for instance, investigated the impact of highways on an Appalachian town. She and her students documented changes along their community's main commercial street in the aftermath of an interstate interchange built a few miles out of town.

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1.  A historian, [Author B] and a history education researcher [Author A] had primary responsibility for designing curriculum for the professional development programs in consultation with a Steering Committee that included a "Master Teacher" and representatives from the local educational authorities whose faculty participated in the programs. The programs were funded by grants from the U.S. Department of Education, Teaching American History program.

Second year projects focused on historical agency in local context. Teachers worked with their students to identify a local issue, investigate the historical roots of the issue, and then take social action based on the investigation. A report that the local Martin Luther King Day celebration was poorly attended, for instance, led one group of teachers working at three different schools (elementary, middle, high school) in the same community to develop a joint project aimed at better informing the public about the importance of King and the Civil Rights Movement. Middle and secondary students investigated civil rights activities in their area and nationally. The middle level students created a series of posters organized around the research questions and these went on display at the community MLK breakfast. Meanwhile, the high school students used their research to develop and deliver instruction to the elementary students, and then helped them create digital documentaries to be shown at the breakfast. This project was so successful and generated such an enthusiastic crowd for the breakfast that the MLK day organizers requested a repeat performance the next year.

Third year projects focused on narrative and engaged teachers in developing digital documentaries around historical questions. Three teachers, for instance, developed a digital documentary considering how a company town shaped local culture, while others examined the impact of "outside" reformers on insider and outsider perceptions of the region.

The fourth year projects varied between groups, with Group I developing "teaching trunks" for their fourth year project. The trunks included lesson plans, realia, and documents organized around a topic and related historical questions. They were intended for use by other teachers in the district, as well as by program participants. Group II developed two workshops for area teachers, one on war and the local homefront, the other on the Civil Rights Movement in Kentucky. Both were intended to develop leadership skills among the teacher-participants and extend the impact of the professional development program.

*Participants*
The number of participants varied across the 4 years of each program as teachers transferred out of school districts, moved from one grade level to another or dropped out for personal reasons. Other teachers moved in, too, but the results reported here are based only on the 36 teachers (19 in Group I; 17 in Group II) who completed pre- and post-program surveys of historical inclinations and content knowledge, participated in more than half the activities over the 4 year period, attended at least two summer institutes, one of which was a trip outside the region, completed at least two of the assigned projects, and participated in the final interview. Of these, interviews and yearly projects proved the most fruitful sources of information in regard to conceptions of place. Other sources of information provide occasional insights into teacher thinking, but the results reported here rely primarily on the projects (artifacts and documents) and interview transcriptions.

## Analysis

After an initial search of the data for patterns as well as anomalies, interview transcripts were reread, and a set of coding categories developed. We used these to code all transcripts, and then checked for consistency across coding categories, combining, eliminating, or adding categories and analyzing the transcripts for cross-category corroboration. We followed a similar procedure in regard to the projects, developing and refining a set of coding categories for each type of project (community history, built environment history, historical walking tour, historical research/action plan, digital documentary), and then compared data across the projects and, finally, across data sets (projects and interviews). The findings presented in this paper focus on the ways in which teacher-participants connected the local and translocal currently and historically "On Our Own Land".

*Knowing where to make the connections*
The most powerful findings in regard to the impact of place-sensitive professional development for these history teachers relate to "feet on the ground" experience. It might be expected that teachers' experiences in new places would profoundly alter an imagined other place whose contours drew from second hand report, media, reading, or geographic and historical study, but the degree to which teachers reported that experiences with new places altered their conceptions of home was remarkable.

*What happened here is history*
As we noted earlier, teacher-participants initially described their region as relegated to a historical backwater, subject to stereotypes and, overall, misunderstood. They described themselves as weary of contending with "outsider" perceptions and angry at the persistence of cultural stereotypes, especially in more affluent regions of their own state. As adults, some spent time collecting information on local history and genealogy, but few reported much attention in their own schooling to local studies, especially after the primary grades. As a result, as one elementary teacher explained, "I didn't know much about local history, even after living here 20 years." For her, the first two program-related projects (local history and local history connected to some expression of agency) "pushed me into paying attention to local history." Another group of teachers described how important they found their archival work with Appalachian sources. One teacher found a picture of her grandfather guarding "scabs" [strike-breakers] during a strike.

"I'm going home and ask my grandmother about this," she said. A teacher in another interview group explained that, as teachers "[w]e often talk about other people being exploited, whether it is women's suffrage, or civil rights, or something like that, but we don't talk about ourselves… We should make connections between the mine wars and the industrial revolution." Another argued that teachers too often forget "the primary source of the land itself, the people in that place. That's the biggest thing."

The idea that the land could be a primary resource, teachers in each interview group explained, encouraged them to consider the geographic contexts for history, especially who had access to land: "Those that had power and access changed over time, kicking some people off the land," one group agreed. They reported that considering "what use people made of the land," "who was strong enough to get to the land, cross the mountains, survive," and remembering that "what's happened here is history - it may not be the big earthshaking things, but it is still important " had become part of their intellectual repertoire.

Further, the program's emphasis on collective social and historical agency led them to rethink the ways in which they understood and taught about the use of the land. In one interview group, for instance, teachers noted that the more they learned about living on the land in Appalachia, the "more things we… realize we didn't know." Another teacher in the same group said, "I thought I [knew] it all, but I was wrong" about the region's connections to other places. Eastern industrialists, for example, "influenced people's lives even in Eastern Kentucky," not only by extracting mineral wealth, but also by bringing in workers from other parts of the world. As one teacher noted:

*[Industrialists] changed [foreign-sounding] names, took their identity away to support their economic goals… Our textbook makes industrialization seem like progress, but lots of other stories are left out. **Our** story is left out. Now we see that it was more chaotic.*

This more tumultuous interpretation of place appeared in each of the interview groups as well as in the projects teachers developed. Teachers described migrants to the coalfields, for instance, as changing the geographic as well as cultural landscape of places in their region. The rough and tumble cultural mix in the mines also had, they explained, a profound impact on the immigrants, sometimes forging interethnic alliances; sometimes heightening interethnic tensions. The nature of 20th century Appalachia as a switching point - a polyglot of farmers, industrialists and entrepreneurs, workers from different nations, races and ethnicities, reformers and exploiters, government agencies, local citizens and civic leaders, Pinkerton spies, small business owners and political pundits - left teachers trying to understand what one described as "the complexities of mixing cultures… a history in your own backyard… a place where our textbooks do kids a disservice." At the end of the 4 years, in all but one interview group (in Group II) the teachers reported feeling confident in their ability to connect Appalachia to national and some global trends and issues. They discovered, they said, that their place was not isolated, but played an important role in national history.

This finding is particularly encouraging because in their first-year projects teachers struggled to make just such connections. Rather than craft historical questions that connected local and national patterns, they more often presented communities as unique and self-contained. They might point out specific changes in a community, a business, or a religious organization, but rarely provided any larger context for making sense of the changes they reported. A typical project might describe working conditions in a local mine, for instance, but connect it more to life in the local company town than to larger efforts to prevent unionization, control workers, or keep coal cheap. In some cases, presentations made tenuous connections to other places - to differences in patterns of settlement coming west through the Cumberland Gap as opposed to movement south across the Ohio River, for instance - but again, the analysis tended to be one-dimensional, emphasizing the impact on Appalachia, but not the issues that might have precipitated migration, the subsequent exchanges with and impact on eastern seaboard cities, or on national policy. It was not until teachers participated in program-related travel that they began associating places with multi-directional movement and described their own place as connected as well as unique.

*Connecting here and there*
Although some of the teacher participants in each group had considerable travel experience, only one or two teachers had been to any one of the destination cities for the summer institutes. In written evaluations after each trip and in the final interviews, almost all teachers described their first trip (Group I: Washington; Group II: Boston) in terms of idiosyncrasies and commonalities of place as well as the power of first-hand experience. To some degree the Washington trip most clearly met participants' hopes and expectations: Monuments were as they expected, the metro turned out to be manageable, and they gained confidence in their ability to negotiate a large city. Being there, most agreed, gave "meaning… created excitement" and meant that they "came back all geared up… a better teacher" because they could describe "being there and what it did to your imagination and creativity." It was, one teacher concluded to her peers' agreement, an opportunity to "experience [Washington DC] historically and *physically*" [emphasis added]. This, one participant noted, was "priceless… to see, to connect. I came back with pictures and documents. I was part of history as it was happening."

Another, who had more national travel experience, explained that "before when I traveled, I was a tourist. Now I want to find out more about the history [because] it makes you want to understand the place and ask questions. "Visiting places such as the Holocaust Museum "was so moving. You've been told, but this is an experience," as was hearing veterans speak at a booth adjacent to the Vietnam Memorial. "We walked in dead silence," one teacher said of the Vietnam Memorial. "We looked for names from Kentucky, for a personal connection." They felt themselves able to "get behind the scenes," "see what we teach about," and bring it back to their students so that "you are more passionate in your teaching."

In contrast to Washington's monumental attention to history, Boston's past appeared to the majority of the teachers to be less apparent on the landscape than they had anticipated. One teacher captured a common theme in the interviews:

> I'd studied these places all my life, and then realizing that there are only pieces of the history preserved. Like when you stand where the Boston Massacre took place, it is literally just a spot! Just a spot in the middle of a busy intersection! Commercialism and modernism encroach on history.

The ways in which modern Boston swallowed up the past, swirled around it, and marketed what remained fascinated the teachers. "History looks real nice in the textbook," one teacher said, "but society moves on." But, reminded a colleague, "I can say 'I was there and I saw this' even if it is a tiny little rock, and [my students] will be amazed that it is supposed to be THE Plymouth Rock." In another interview group, teachers noted that it was "disheartening" to see "history engulfed by enterprise," but the experience gave them "a greater appreciation for local landmarks [in their own communities] and made them "want to preserve them." They were also quick to point out that marketing the past inevitably changed the places marketed. This was particularly the case in Salem, Massachusetts where witch paraphernalia drowned out much else of historical interest in the seaport town. In three of the four interview groups, too, someone commented that, although geography certainly influenced culture - coastal regions develop cultures distinctly different than inland mountain areas - variation also marked geographic regions. Long-dead witches take on new life in museums, kitschy tourist shops, and restaurants in coastal Salem, while the shadows of tenement life, Dutch merchants, and 19th century industrialists can still be found in the midst of another coastal city, modern Manhattan. In the midst of all this, they found standing in historical places viscerally compelling. At Lexington Green one teacher looked around and echoed what most participants reported, "I can't believe I am standing on this site." Noting how differently people ordered their lives in different environments, too, each group summarized their experience with something close to the words of one of their number: "There's more to the world than Eastern Kentucky."

While noting clear differences among places, teachers also remarked on commonalities among people, often describing people they met as "just like us." As one teacher commented in regard to commonalities:

> There are nice people everywhere you go, and that's something I've discovered in our traveling. I'm not that well traveled so these trips have certainly been an eye-opener for me because it seems like the more places I go the more I see how much we have in common, around consumerism, especially. I don't want to say we are completely losing our individualism, but there's a Wal-Mart just about everywhere.

In another group a teacher noted that he had worried a bit before going to New York:

> "People asked if I was afraid of getting mugged or robbed, but it's like your regular neighborhood. They aren't going to be rude to you,"

and others recalled being a bit nervous about the Washington metro or New York subways, but finding people friendly and helpful.

Of the four out-of-state trips, however, Santa Fe generated some of the most interesting conversation about the unique and connected aspects of place. Only two teachers had been to Santa Fe previously, although at least two others had been in other parts of the Southwest. Prior to their introductory reading, however, none reported having studied the history and geography of the area except in brief overviews of early Spanish exploration and later annexation. Not surprisingly, then, in interviews all but four teachers described confronting misconceptions throughout the trip. One common misconception related to how "Mexican" New Mexico might be. Echoing statements by her peers, one teacher explained: "I thought it was strictly a Mexican culture, which it is not." Others commented on a "surprising" level of Spanish influence "even if it is exaggerated for the tourists." They commented most often, however, on elements of Pueblo Indian history such as the 1680 Pueblo Revolt, the first of what would remain only a handful of successful revolts by Natives against Europeans in the Americas (Folsom, 1996).

An archaeologist led the teachers through one of the sites of the Revolt, allowing teachers to climb down into restored kivas, pick up (and replace) pottery sherds, and imagine the life lived in this challenging geographic location along the Pecos River.

"I hadn't thought about using archaeology this way" one teacher commented after the archaeologist helped them to see outlines of human occupation on what initially seemed a rather barren vista. Equally powerful, however, visiting the Taos Pueblo, "where people still live" gave teachers a chance to talk with contemporary Pueblo people living and working in the historic pueblo. This led to an interesting discussion regarding connections between life on the Pueblo and in Appalachia. Notes on the follow-up discussion capture teachers imagining living on the Pueblo or a nearby reservation. "We could live here," one teacher said, as she looked across reservation land: "Extractive industry benefiting somebody else, living in trailers, living with stereotypes in a harsh landscape." "Being pushed off the land," another chimed in. "And watching mines pollute the land," someone else called out. "They end up without their land," another said, "You give up the rights to your land, like with coal rights, and the government responds to the requests from Big Business leaders."

Following visits to the Santa Fe Indian Boarding School, hearing presentations on different aspects of American Indian experience, from art and cuisine to education and politics, and listening to an Anglo tour guide dismiss Pueblo people as resisting change, some of the teachers also found common cause with Indian perspectives. In the case of the tour guide, as he explained that Spanish colonization had been more beneficent than that of other Europeans, one of the teachers spoke up." Except for the part where they cut off the Indians' hands and feet," she said. Another teacher commented later that hearing from these different people helped him to see things from a different perspective and others noted that speakers challenged them to dig below Santa Fe's surface and try to understand the complexity of this place.

For at least four others, their colleague's outspoken response to the tour guide was seen as inappropriate. And, even though the comment was probably not heard by more than a handful of study participants, in the final interviews teachers in one group argued that it was rude to respond to the guide in this way. Two others in the same group said that the speaker's presentation on Indian arts "had a political agenda" and should not have been part of the curriculum. All four participants in this group noted that they would not be using information from this speaker as it was not appropriate for elementary students "who just learn early colonization and the Revolution." Interestingly, only two people in this group had gone on the Santa Fe trip; the other two had not heard either the tour guide or the speaker on Indian arts. Further, the fifth-grade curriculum to which they referred begins with exploration and, according to curriculum documents at least, concludes in the present - a pattern that could easily include Pueblo history as well as European exploration, settlement and annexation of what is now the U.S. Southwest. Nonetheless, they were uncomfortable with both expressions of agency - one because it violated their perception of courtesy; the other because it violated their expectation of a "neutral" stance from speakers. Interestingly, none expressed similar reservations in regard to manuscript sources or to the school principal who discussed the politics of Indian education, only to troublesome interpretations from people perceived to have a "political agenda.

### Adapting to physical and cultural geography
Physical and cultural geography received considerable attention during each out-of-state trip, but perhaps because the contrasts were so stark in New Mexico, the trip to Santa Fe generated more conversation in this regard. For all four interview groups, a perceived "blending of cultures" was especially noteworthy. "I'd love to take my [students to New Mexico]," one teacher remarked, "to see the unique cultural landscape" as well as the connections with Appalachia and the contrast in approaches to similar problems. One of her colleagues noted that in his hometown, people noticed when a Mexican shopped at Wal-Mart, and now, he said, "I wonder, when I went in a store in New Mexico, did they say, 'ah, there's a White person'?" "It is a change," noted another, "being in a very diverse place. I began to understand a little of what it is like to feel like a minority, a sort of different feeling. For me, a big change." Even altitude forcefully reminded them of "what the body has to do to adapt, the change in diet, farming" in an environment so different than their own. One teacher laughingly explained that she "didn't realize just how bland our [Appalachian] culture is, and why people don't necessarily want to live [in Appalachia]."

Overall, teachers in three of the four interview groups explained that the trip to Santa Fe allowed them to absorb a place - note what people ate, experience the look, feel, and smell of the high desert, the color of sand and cliff, sky and river bottom, gaze across the relatively unpopulated distances between places and view a very different mountain environment connected to Appalachia by Wal-Mart, mining, and nationality, among other things. "I teach differently as a result," several said. "As soon as I got back," one teacher observed, "the first day of school, I mentioned it to the kids, and they were fascinated." Her colleague adds, " 'Here is what this place is like,' I can tell them." "Being able to say 'I was there and I saw this,' changes my perspective as a teacher," another says. "You go to another place and see history from another perspective. That's different than the text," another continues. And what they conclude, as one teacher summed it up, is that place is tied to the struggles of people to keep their identity or find a place in (or in opposition to) American society. It is tied to the foods people eat, the colors with which they decorate their world, the music they sing, and the conflicts that continue to challenge them, and to the land itself. As one teacher points out, "look at the way people suffer. Look at the cost. That forces you to look at perspectives about the land. Whose land is it anyway? Whose [pursuit of] happiness is it?" "I simply have more first hand experiences and knowledge of past and present life in the Southwest," another says. "I am better prepared to translate this part of American history more accurately."

From the teachers' perspectives, study travel increased their facility in reading and critiquing public expressions of a place's historically developed and geographically based uniqueness as well as its equally historical and geographical connectedness. The uses made of the past in the present highlighted the power of place in history and most were able to pull these experiences back into their classrooms in a variety of ways.

Everyone reported sharing their experiences with their students, but the most interesting responses involved the connections made between the places teachers traveled and their local place. Perhaps the most dramatic was the teacher who declared that she related local/translocal connections to agency "a thousand times over":

*I relate [agency] to the coal industry and I have related it to the Montgomery Bus Boycott, and bring it back to the Harlan County mine wars and talked about how we, too, influence a national movement. That we, too, are more than just "those poor people." These things don't just spring up. Bosses intimidating workers, right now environmentally, it is happening across the world.*

Others describe making comparisons regarding extractive industry, unionization, exploitation of minorities, and settlement patterns as well as why urban centers arose in some areas, but not so much in the mountains. As one teacher explains it, the travel allowed her to develop "overlapping themes" in her instruction - comparisons among places in regard to how people use the land, who controls the land, and who profits from the land. A colleague explains that she starts several themes in national history with Appalachian examples; another begins with one of the places to which he traveled. Still another teacher describes beginning discussions by asking students whether decisions about what a place *can* or *should* be involve "what is good for the whole or just your group?" How, in other words, is place experienced by different people, and who benefits from these differences?

## Conclusion

### The challenge of reading the deep contingencies of place

In the context of this study, teachers talked about discovering a "legitimate voice" for their region in national history, of bringing the complexities of place - their own and others' - into the foreground in their instruction, and dislodging some of their own misconceptions. To that end, they brought photographs and realia back to the classroom as well as their own excitement about experiencing a powerful intersection of past and present in deeply interconnected places. In final interviews they discussed the various place-based constraints on human agency available in their own community as well as in each of the places they visited, from the way history was written on the landscape, to the impact of various forms of "switching" between communities, the complex identities associated with place, and their concerns about dealing with controversial issues related to place.

### Writing history on the landscape

Investigating the history written on the landscape, from memorials and museums to living history sites and historical markers was one of several instructional themes and goals of each trip, and the one most often described as transformative in interviews. As the following exchange suggests, teachers described this theme as eye-opening for themselves as cautionary in regard to the instruction they provided for their students:

Julia:  *Students need to make sense of the bigger picture [surrounding public history].*

Ilene:  *We have misconceptions, too. It has helped me to do background readings, open my eyes to my own misconceptions and we pass them along to our kids.*

Paul:  *It is a fine line... to realize your power over students.*

Julia:  *You are under the microscope. Students will correct your mistakes.*

Paul:  *Just like the tour guide who gave conflicting information. Who do [students] trust? When I did this with my students, the kids looked it up. They wanted straight facts. That means we need to do our homework, too.*

Perhaps feet-on-the-ground walks through a historically and commercially layered present contrasted so vividly with mental images based only on second-hand report, whether from textbook or media, that teachers could hardly miss the challenges inherent in public displays of the past. The contrasts among public displays, guest historians' and historical guides' interpretations, documentaries, films, readings, and local residents perspectives built into the curriculum further inclined teachers to bring a critical eye to the past as inscribed on the landscape. And, further, field-based assignments, including photographic essays, required attention to contrasting interpretations.

### Multidirectional switching points

A second theme that resonated with teachers involved locating Appalachia in a multidirectional network of places. "I don't think a lot of people think like that," one teacher commented. "People from this area going to different places, in Ohio for years before moving back to Kentucky," another explained. "I hadn't thought of that, not of people moving both ways." "Or," another said, "the diversity of this place, bringing in all the different cultures that merged in Eastern Kentucky." Others also noted the "multidirectional frontier, not a set pattern," the "back and forth movement" of people and ideas, and "agency - who has power, how it is maintained, how lost." "As a history major," one noted, "I knew about those things, but it isn't just a given. It is a challenge.

### Why was it this way in this place?

While teachers became increasingly adept at analyzing local and translocal patterns some continued to find it challenging to step back from their own attachments to place, to consider the deep contingencies involved in interpreting the impact of place on local history, or to plan instruction that involved students in more analytical and multi-perspectival stances in regard to the history of their own place. A small number of teachers (6 out of the 36: 2 in Group I, 4 in Group II) worried that multiple perspectives might be inappropriate for younger students or might be culturally offensive in Appalachia. The concerns in regard to elementary age students focused either on content not being specifically identified in the Core Content for Instruction ("We should stick to what is tested.") to maturity levels ("They need to learn the basics first.") or to complexity. Recognizing some of the deep contingencies operating locally, they worried about how to present such complex interactions, especially to younger students, and whether grappling with complexity might actually set students up for difficulty on tests that asked for considerably less complex cause and effect relationships.

### Controversial pasts

Although only a handful of teachers addressed controversial historical interpretations directly in interviews, informal conversations suggest it may be an issue with other participants. Three guest speakers generated some concern in this regard. In Group I, two participants worried about a speaker on the Harlem Renaissance being "too radical" and in Group II, a speaker on Indian issues and a Latina historian elicited concern from four teachers. Another teacher in Group II explained that her students would not understand history that "was too political." These comments were, however, the exception. As one teacher in Group II wrote immediately after hearing both the Indian and Latina speakers, "[They] provided new information... to add to the repertoire! Yes, I know [they] weren't popular with some on the trip but the perspective is different and the information something we didn't get elsewhere. Besides, sometimes you need a *radical activist* to help you see things from a different perspective - or not" [emphasis added]. The "radical" designation is an interesting label.

To some extent teachers' ascription of radicalism related to contradictions between current scholarship on women and minority populations and the mainstream narrative of progress and exceptionality that marks much school history in the United States (Foner, 1999; Wertsh, 1998). Yet, the majority of teachers said they appreciated the "myth-busting" and different perspectives offered by speakers, arguing that they "helped me think about what we were seeing," or helped "understand merging diversity." No one identified the Indian educator as radical when she explained the politics involved in keeping the boarding school afloat or the centrality of Pueblo culture to the curriculum, but a speaker who discussed other forms of cultural preservation in the American Indian arts movement was perceived as a "radical activist." Although we cannot fully explain these responses, they certainly raise interesting questions about the influence of the forms in which difference is encountered and teachers' differential responses to those forms.

For the most part, however, the teachers in this study described their experiences with difference as interesting and informative, even if sometimes a bit uncomfortable. In the end, they might not change their mind based on what they were hearing, but they listened, discussed, and considered what each speaker might offer to enhance their own understanding and future lesson planning.

### Implications

Overall, teachers expressed interest in complex past/present connections within and among places. The inferences they made about their own place and those they visited drew from the background readings and scholars' presentations about the ways in which history played out on the landscape and in the culture. To some extent, then, the experience of place provided a microscopic view of historical, geographical, and cultural narratives and connections among specific places in contrast to the more usual macroscopic national and, occasionally, global histories with which they were familiar (Ayers, 2004). Interestingly, however, a local lens was not in itself sufficient to generate attention to multidirectional as well as differential movement across and between places (Holloway, Rice, & Valentine, 2003). In their first-year local history projects teachers made minimal connections to other places within the region and even more rarely noted national or global patterns. Teachers reported that opportunities to travel to unfamiliar places, talk to local residents and read related scholarship not only changed the way they thought about their own community, but changed the way they taught about it, too. Perhaps most strikingly, teachers drew heavily on two of the historical thinking themes introduced in the professional development program - perspective and agency - in discussing the dissemination and subsequent localization of historical trends and patterns.

How well those connections can be sustained over time remains to be seen, but they suggest a powerful interplay between local and translocal experiences that argues for broadening teachers' engagement with place, not just to enrich their geographical understanding, but to support their historical thinking. At present, very little professional development for history teachers involves the kind of study travel described here, where, as the teachers say, the land is a primary source.

Teachers certainly profit from trips to historic sites from Williamsburg to the Alamo, but they also benefit from investigating the layers of history in a living place, including the ways in which history and geography intersect as elements of the past are preserved (or erased) through housing and commercial patterns, monuments and markers, place names and tourist attractions, industrialization and agriculture. Not only does this kind of study and travel expand teachers' grasp of the localized nature of national and world history, it encourages them to attend to the interplay of perspective and place in shaping the agency available to and accessed by people in different times and places. This, in turn, better prepares teachers to introduce students to place-based contingencies that influenced how national patterns played out in local arenas.

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## Appendix A

| Program and Themes | Program Components |
| --- | --- |
| Group I (19 teacher-participants)<br><br>Themes: Shifting Frontiers/Perspective<br><br>Democracy and Conflict/Agency<br><br>Industrialization and Reform/Narrative | 3 Week-long summer institutes<br>6 Weekend seminars<br>Regular consultations with a "master teacher"<br>Yearly summative projects<br><br>Regional field trips to:<br>Asheville, NC<br>Benham & Lynch, KY<br>Pleasant Hill, KY<br>Frankfort, KY<br>Cumberland Gap, KY<br>Lexington, KY<br><br>National trips to:<br>Washington DC<br>New York City |
| Group II (17 teacher-participants)<br><br>Themes:Life (and the Land): Perspective<br><br>Liberty/Agency<br><br>Pursuit of Happiness/Narrative | 3 Week-long summer institutes<br>6 Weekend seminars<br>Regular consultations with a "master teacher"<br>Yearly summative projects<br><br>Regional Field Trips:<br>Cumberland Gap, KY<br>Pleasant Hill, KY<br>Frankfort, KY<br>Lexington, KY<br><br>National Travel to:<br>Boston, MA and environs<br>Santa Fe, NM |

Sample Historical Book/Media Sets
(Not including articles/primary sources/speakers)

| Topic | Site-Specific | National and Kentucky Connections | Children's Literature |
|---|---|---|---|
| Culture Contact on the Borderlands: Santa Fe and New Mexico | W. Cather (1927/1999). *Death Comes for the Archbishop.* University of Nebraska Press.<br><br>R. Folsom (2004). *Indian Uprising on the Rio Grande: The Pueblo Revolt of 1680.* Albuquerque: University of New Mexico Press.<br><br>C. Wilson (1997). The Myth of Santa Fe: *Creating a Modern Regional Tradition.* Albuquerque: University of New Mexico Press. | R. Bensen (Ed) (2001). *Children of the Dragonfly: Native American Voices on Child Custody and Education.* Tucson: University of Arizona Press.<br><br>A. Hirschfelder, P. F. Molin & Y. Wakim (Eds) (1999). *American Indian Stereotypes in the World of Children: A Reader and Bibliography.* Lanham, Maryland: Scarecrow Press.<br><br>A. G. Henderson (1992). *Kentucky Before Boone.* Lexington: University of Kentucky Press.<br><br>P. Limerick (1987). *The Legacy of Conquest: The Unbroken Past of the American West.* New York: Norton.<br><br>Film: Sherman Alexi (1998). *Smoke Signals* | R. Freedman (1990). *Children of the West.* NY: Sandpiper. |
| Industrialization and Reform: From Kentucky Coalfields to New York Tenements | H.R. Diner (2001). *Hungering for America.*<br><br>K. Jackson (2005). *Empire City: New York Through the Centuries.* | D. Billings & K. Blee (2000). *The Road to Poverty: The Making of Wealth and Hardship in Appalachia.*<br><br>J.W. Hevener (2002). *Which Side Are You On?: The Harlan County Coal Miners, 1931 - 39.*<br><br>R. Shogan (2004). *The Battle of Blair Mountain: The Story of America's Largest Labor Uprising.*<br><br>R.S. Weise (2001). *Grasping at Independence: Debt, Male Authority, and Mineral rights in Appalachian Kentucky 1850 - 1915.*<br><br>Film: Sayles (1987). *Matewan.* | S. Bartoletti (2005). *Black Potatoes: The Story of the Great Irish Famine, 1845 - 1850* NY: Houghton-Mifflin.<br><br>P. Giff (2002). *Nory Ryan's Song* NY: Delacourt.<br><br>R. Freedman (1995). *Immigrant Kids* NY: Puffin.<br><br>R. Levinson (1995). *Watch the Stars Come Out* NY: Puffin.<br><br>Miller, Miller, & Miller (2002) *Journey of Hope, The Story of Irish Immigration to America.* |

# Valid Assessment of Students' Use of Historical Sources

## Elisabeth Pickles

*Abstract - This paper arises from research into relationships between substantive knowledge and the use of historical sources by secondary school students in England. The research involved presenting an evidence task to 164 students in which they were asked to draw conclusions from seven sources about Cromwell's motives for supporting the execution of Charles I. Inductive analysis suggested that conceptual understandings of substantive issues, as well as disciplinary understandings relating to evidence and empathy, played an important part in students' uses of the sources. Thus valid assessment needs to take account of a range of understandings and also the nature of the reasoning employed.*

*Keywords - Substantive knowledge, evidence, sources, empathy, reasoning, assessment.*

### Introduction

The use of historical sources has been a compulsory part of GCSE courses since their introduction in 1986 and a part of the National Curriculum since its inception in 1991. It is also an element of all A level courses. However, there has been widespread concern amongst history teachers about source questions on GCSE, AS and A2 examination papers (e.g., in HA, 2005). Although there have been some changes in new A level papers, these do not appear to address all the concerns. Clarification of relationships between substantive knowledge[1] and second order understandings[2] related to evidence appears to be desirable for improved assessment. Since 1996, students have been required to apply knowledge to their use of sources in order to access higher level marks at GCSE but the ways in which they should do this have not been defined.

Previous research, especially from the SHP and CHATA projects in England, led to the identification of the ways in which students progress in terms of conceptual understandings of evidence (e.g., Lee *et al.*, 1995; Shemilt, 1987). Other research (e.g., that reported in Barrett & Buchanan-Barrow, 2005) has considered some aspects of students' substantive concepts relevant to the study of history. The research reported here attempted to consider the effects of substantive knowledge on the use of sources and the degree to which more advanced conceptual understandings of evidence encouraged students to make greater application of knowledge. A further question was the degree to which empathetic understandings encouraged the deployment of knowledge as the effective use of sources as evidence requires a recognition that they were produced in a different world of ideas from our own (Wineburg, 1998). Empathetic understandings had also been investigated in the SHP and CHATA projects (Lee & Ashby, 2001; Shemilt, 1984). The research was therefore designed to consider the following questions:

1. How far do students use historical knowledge in drawing conclusions from sources, and for what purposes?
2. How far and in what ways, do students' second order ideas relating to evidence lead them to deploy knowledge?
3. What types of empathetic understandings do students draw on in their use of sources and, in particular, how far do they draw on historical, as opposed to everyday, understandings of human behaviour?

Although previous research had emphasized the importance of conceptual understandings of evidence, in examination courses and the National Curriculum, the use of sources has often been defined as involving "skills"[3] such as interpretation and evaluation. Evaluation is regarded as a higher level "skill" than interpretation in National Curriculum levels and examination board mark schemes (e.g., QCA, 2008, p. 9; AQA, 2007, pp.4 - 7; Edexcel, 2007, pp. 475 - 77; OCR, 2007, pp. 11 - 14). The "skill" of evaluation is seen as involving "processes" such as considering the motives of writers and the circumstances in which the sources were produced in order to establish their reliability. This research allowed some assessment of the validity of such an approach.

The research involved a task designed to provide evidence of the thought processes of students with different types of knowledge and conceptual understandings. Students were asked to draw conclusions on the reasons for Cromwell's support for the execution of Charles I from seven written sources. (The task is given in APPENDIX 1, p. 83) The subject was a relatively well known event in a period when perspectives were very different from those commonly held today.

1. Substantive knowledge refers to the content of the subject matter.
2. Second order understandings relate to the discipline of history.
3. The use of quotation marks indicates that the application of the words within them is controversial in the context of evidence tasks.

The event also related to institutions different from those with which students were likely to be familiar in their own society. 83 of the students had recently studied each topic to which the sources related and 81 had not. 84 were from Key Stage 3 and 80 from Key Stage 5. Students were from 19 different schools. The research provided insights into the diversity of students' thinking and the ways in which substantive and second order understandings may be related rather than indications of how students would necessarily perform in another evidence task.

38 did the task using a think-aloud method in order to gain as full a picture as possible of the relationships between different types of understanding. These were given the sources broken into segments and asked to verbalize their thoughts as they read them. The written responses of a further 126 students allowed tentative hypotheses about thinking in the wider population of history students. Two questionnaires were completed by students before they did the evidence tasks: these were designed to provide an overview of the ideas they were bringing to the task relating both to the substantive topics and to the discipline of history. Think-aloud students were interviewed after the evidence task further to probe their ideas about historical method. Analysis was inductive but informed by the findings of previous research. The following sections provide an outline of some ways in which substantive knowledge, ideas about evidence and empathetic understandings appeared to affect students' responses.

## Substantive Understandings

71% of students made some application of historical knowledge but its range and depth and the uses to which it was put varied widely. The nature of substantive conceptual understandings seems to have influenced the degree to which knowledge encouraged an analysis of the sources. Students often did not see the comprehension of sources as problematic (possibly because it is not defined as a higher level "skill" in GCSE mark schemes or in National Curriculum levels). Most rarely referred to knowledge explicitly in their attempts to understand the sources. Deeper substantive understandings appear to have played an important part in encouraging some students to think carefully about meaning. For example, an understanding of Divine Right as a simple idea, universally held by religious people in the 17th century, led to the inference, with little analysis, that Cromwell cannot have been genuinely religious. For one student the very fact that Cromwell fought for Parliament's army shows that he cannot have believed in Divine Right. This conclusion could be reached without any reference to a source. Another took the fact that Cromwell criticized the King as evidence that he was not religious which meant that very little analysis was necessary. Georgina[4] (Y12, NRS, TA[5]) considered the possibility that Cromwell may have believed in Divine Right and also that the King had lost God's favour because of his actions. This involved more analysis of Cromwell's argument but she was inclined to be sceptical about Cromwell's claim to know God's will, perhaps reflecting a limited understanding of Cromwell's belief in Providence.

*So he's kind of contradicting this idea that the King's kind of God's representative on earth and [...] basically saying, don't protect the King because he's not the true religion [...]. He thinks that in normal cases, you know, the King or Queen would be God's kind of person on earth and that it does go down in that hierarchy that they used to believe in. But he's saying basically that's not the case any more, because of what the King has done [...]. It seems to me that it's almost quite convenient in the fact that suddenly the King's not God's messenger. And also I do raise questions like, who's Cromwell to decide? He's using God's name left, right and centre in all of his letters and stuff but, I mean, how does he know that that's what God wants? It seems more to me like he's twisting these events and the successes to act like God's on their side when in actual fact it's not the case, it's more him just trying to make what he wants to out of these events.*

A few students who had recently studied the topic at Key Stage 5 had a more complex understanding of 17th century ideas, drawing on both belief in Divine Right and Cromwell's interpretation of Providence. This led them to explore in much more depth the nature of Cromwell's arguments, attempting to understand them rather than readily attributing ulterior motives. This was seen for example in Jane's (Y12, RS, TA) comments on Source C:

*I don't know, 'Consider how God has ordered him', I'm not quite sure what that means but 'affairs concerning him', I think that just means consider how things have gone for him, how he thought he was chosen by God but how currently he's lost two English Civil Wars and he's not doing very well for himself. And so you know there's some sort of glorious and special purpose and that's looking for sort of signs, I guess, of God's plan. I think Cromwell's looking there for sort of a religious meaning to it and what religiously speaking, what it means that Charles has done so badly. And this purpose, that's I think Providence again. I think, it's not, I don't know, I think it is very much again, not Cromwell's own sort of ambition and things coming through there, I think not at all. Yes, I think definitely more his religious belief.*

More advanced conceptual understandings also meant a few students were puzzled about the meaning of sources on occasions. Jane was aware that Cromwell did not share the Presbyterian views of the Scots and was therefore confused by the fact that he spoke as though he and the Scots had a shared view of the 'true religion' in the report of his argument with Scottish officials in Source E. She said:

*I'm not really sure about that because I think there Cromwell's sort of criticizing them because they had been, the Scots had been in agreement with Parliament but then they'd broken it to make an agreement with the King. In the true religion, Protestantism, Puritanism, but I don't know because the Scots' religion was slightly different. They had their own Presbyterian Kirk which they didn't have in England so I'm not quite sure what that means.*

She then deployed further knowledge of their common opposition to Arminianism in an attempt to resolve the issue although she was still expressed uncertainty:

*I think that's there because the King had Arminian beliefs, that Popery and things were coming in, slipping in the back door. And so the Scots couldn't sort of defend him any more because earlier he'd tried to sort of impose changes in the Scottish church and I think Cromwell's sort of saying that, you know, it's not up to the Scots to defend the King any more [...] I don't know, it's all a bit confusing.*

Jane's awareness that there may be difficulties in working out the meaning of historical sources was comparatively rare and would suggest that knowledge may help students see that interpretation can be problematic.

However, the range and depth of substantive knowledge used did not necessarily indicate the effectiveness of the handling of the sources. On occasions, knowledge was used to provide a commentary on the sources rather than to use them to extend knowledge. Knowledge was also often combined with questionable assumptions which meant that inferences drawn were not necessarily sound, particularly when it was used to confirm conclusions or to resolve difficulties with the sources. Students often referred to a single event or decision: for example, a number inferred from the fact that Cromwell refused the Crown in 1657 that he cannot have been ambitious. This involved the mistaken assumption that to be a king in the seventeenth century necessarily involved more power than to be a protector. The use of knowledge in this way sometimes seemed to be used as an alternative to more thorough analysis. In this way, knowledge possibly operated as a limiting factor in students' use of sources.

Thus the use of knowledge in conjunction with historical sources is not a "skill" that students either do or do not possess: some of its uses had much greater historical validity than others. One of the key ways in which knowledge was used productively was in the comprehension of sources, and the complexity of the thinking involved in this on occasions suggests that comprehension should be rewarded more highly than is currently the case in public examination mark schemes. Even those who made effective use of knowledge appeared to do so in an unsystematic way: they used it for a particular purpose in relation to one source but not another. Different students applied knowledge to different sources so it did not seem this could be explained simply by the nature of individual sources. This suggests the importance of increasing students' awareness of the ways in which knowledge can be used and of encouraging them to reflect on their own reasoning.

Students' uses of knowledge to draw inferences about Cromwell's motives and to evaluate are considered in the following sections dealing with evidence and empathy.

## Understandings of Evidence

A key issue in this research was the nature of students' reasoning in drawing inferences about motives. McCullagh (2004) argued that people's intentions are often difficult to discern and the most appropriate method for discovering them is to find the best explanation of all relevant evidence. An informed imagination can produce plausible hypotheses but these need to be checked against alternatives. An analysis of language, a thorough acquaintance with the context and wider knowledge of the author's writings and actions are all important and an historian's representation of an author's intentions may still remain tentative (Leinhardt & Young, 1996; McCullagh, 1984; Wineburg, 1991 and 1994). Research into students' conceptual understandings of evidence identified the highest level of response as involving an awareness that in order to draw inferences from evidence, it must be understood in its historical context (Lee et al., 1995).

Wineburg (1991) described the processes by which historians drew conclusions from sources as the construction of an 'Event Model'. As historians read sources, they formed a range of hypotheses, attaching different degrees of certainty to them. These were then reviewed and modified in the light of sources considered subsequently. Comparisons between sources played a major part in the construction of an 'Event Model'. "Facts" presented in a new document were checked against what a historian had learned from previous documents and what s/he brought to the document in terms of background knowledge.

Historians did not admit one document and deny another. Instead, they accepted some statements whilst rejecting others. The 'Event Model' grew from document to document, incorporating new details and winnowing out less reliable ones. Sometimes information came to be accepted which was initially found improbable. At other times, inferences which were initially tentative were later confirmed. A wide range of contextual information was used by professional historians in Wineburg's study (1998) of the ways in which they drew conclusions about Lincoln's views on race. In the case of a specialist in the period much of this came from knowledge brought to the task. A historian without specialist knowledge was able to weave a context from the sources themselves by asking appropriate questions.

Whilst between them students used many types of reasoning to support inferences about Cromwell's motives, the range of issues they considered individually was usually narrow and thus their inferences varied. Some considered the nature of Cromwell's arguments, others the techniques of persuasion used, some plausibility, others the circumstances in which Cromwell was writing or speaking, the nature of the source or his audience. Rarely was more than one of these issues considered. Thus students drew on a much narrower range of contextual information than the historians in Wineburg's study. Moreover, they compared sources far less in order to build up understanding and were less inclined to exercise caution. There were also marked differences between students in relation to these issues. This suggests the importance of examining students' reasoning rather than simply rewarding a consideration of motives in assessment of the use of sources.

Different interpretations of Cromwell's words led to varied inferences about motives, as was seen, for example, in the following comments on Cromwell's letter to his cousin, Colonel Hammond.

**Susannah:**
**Y12 RS**
*Source C plays a big part in my reaching this conclusion. In it, Cromwell asks his cousin to consider if there is a 'glorious and special purpose' in the imprisonment of Charles. Cromwell does not state there is such a purpose (although the fact he tells his cousin to ask what this purpose is does imply that). The account is one of unsurety, and he leaves Hammond to make his own opinion, even going as far as to say 'tell me', suggesting he himself is not sure of God's will yet which both supports the idea of his quest for religious truth (as echoed in Source E 'the true religion') and that religion, being something so mysterious and uncertain in his eyes, could not possibly have been controlled by him and used to manipulate others. There is no hint of manipulation here.*

**Natasha:**
**Y13, NRS**
*Cromwell's beliefs can be seen in the private letter extract in Source C: this suggests that there was something 'special and glorious' about Charles I being a prisoner. This does seem to suggest that Cromwell was not the truly religious man he presented himself to be, as he seems to be gloating about Charles' downfall. By saying that there was something 'glorious' about his imprisonment, it seems that Cromwell had something to gain from his bad fortune. This suggests to me that Cromwell was indeed a cunning politician who simply used religion as a front to help him achieve his aims.*

Although there is no explicit reference to knowledge in either Susannah's or Natasha's comments, implicit understandings of Cromwell's perspective would seem to have affected the inferences they drew. Susannah, who had recently studied the topic, may have been implicitly drawing on knowledge of the difficulties in discerning God's will experienced by those who believed in Providence. This would suggest that different aspects of source use need to be considered in conjunction with each other. Students need first to work out meanings through careful consideration of period perspectives and then to consider how to establish whether these beliefs were sincerely held.

Occasionally, students compared sources to build up an understanding of meaning. However, some inferences drawn from comparisons involved questionable assumptions. For example, Kirsty compared Cromwell's message in different sources. She inferred that Cromwell was a hypocrite based on the assumption that using different arguments on different occasions is evidence of insincerity and seemed quite certain about her conclusion.

**Kirsty:**
**Y9, NRS**
*In Source E it states that Cromwell thought the King had broken his trust so this ought to be punished showing Cromwell wanted to execute the King for revenge. But in Source D it states that God had directed events so it was clear they had to do this. This contradiction shows Cromwell was a hypocrite as he wanted to kill the King for revenge. He told the other politicians he was doing it for religious reasons. This shows once again he was cunning and was just trying to rally support to do his bidding.*

By contrast, Nathaniel made a considered distinction from a comparison of the sources between what he could be certain about and what he needed to be more tentative about.

**Nathaniel:**
**Y12, NRS**
*Of course these five sources only represent a selection, but the impression is that... at the very least the consistent pretext for the actions of Cromwell was God's will. It is harder to establish that his justification was motivated by genuine belief, although if it were merely an expedient pretext, it seems to have been used with surprising inflexibility.*

This again illustrates the importance of considering reasoning rather than simply classifying cross-referencing as a "skill". It also suggests students should be encouraged to assess degrees of certainty that can be attached to different aspects of their conclusions.

Some ideas about evidence that students had limited their ability to make use of the sources, even when the processes employed would be rewarded highly in public examinations. The majority of students (60%) evaluated the reliability of at least one account of Cromwell's words or actions. However, many seemed to be operating with the idea that if a source is evaluated and deemed unreliable, little or no use can be made of it. They therefore did not consider the inferences that could be drawn from sources classified in this way. For example, the application of knowledge to evaluation by Sophie meant that she made no use of Source A in her argument. By contrast, Frances (whose evaluation was less overt) made more use of the source by considering that it could be taken as evidence of Cromwell's role in events, despite the perspective of the author.

**Sophie:**
**Y12, RS**
*This source, however, may not be wholly reliable. William Allen was not favourable towards a monarchy, and also wrote the book from which the source is taken in 1659, 11 years after the second Civil War. It may have been written with a biased view, and also looking back with hindsight.*

**Frances:**
**Y12, RS**
*William Allen, one of the more radical supporters of the execution, in favour of complete abolition of the monarchy, gives an account of the Windsor Prayer Meeting in April 1648 (Source A). Allen personally appears to be very convinced of God's role in events, but admits that this was advised by Cromwell.*

Thus the way in which sources are used as evidence needs to be considered, rather than simply the processes employed.

There was no evidence that students had a conception of the construction of an 'Event Model' in their responses to interview questions and inconsistency of method across their responses also suggested this. However, a number of students showed thinking similar to that of professional historians in at least parts of their responses. They used knowledge in conjunction with the sources to build a richer picture than they had at the beginning. They considered a range of hypotheses and were more certain of some than of others. They puzzled over aspects of sources that did not immediately fit the substantive framework brought and tried to make sense of them, using other sources and knowledge. This involved considering a wide range of issues relating to the interpretation and evaluation of sources in a much more complex way than that described in examination mark schemes, even at A level. This suggests that if assessment drew attention to the concept it may encourage students to make more constructive use of sources. For the concept to be used effectively, students would need to reflect more on their reasoning and, in particular, on the assumptions being brought (as considered in the following section on empathy). The disposition to engage in systematic and complex thinking in order to reach defensible conclusions would be promoted if it was appropriately rewarded.

## Empathetic Understandings

When asked directly about perspectives in initial questionnaires, most students were aware that people in past societies had different values and beliefs from those commonly held today. It might be expected that such understandings would encourage students to be cautious in drawing inferences and to be aware of the need to consider context. However, in drawing inferences from sources most reverted to everyday understandings of human behaviour apparently drawn from their own experiences rather than from a consideration of the period context. This was consonant with the findings of other research (e.g., Körber, 1998; Seixas, 1993; Wineburg, 2001) which has suggested that students are likely to revert to everyday understandings unless their attention is specifically directed to the importance of considering period perspectives.

Everyday understandings were used when students took attempts by Cromwell to persuade as evidence of manipulation without considering whether he could have genuinely held the views expressed. Sometimes knowledge of a particular audience's perspective was combined with everyday understanding to support an argument that Cromwell was tailoring his message. For example, Frances (Y12, RS) wrote:

*Burnet (Source E) writes of Cromwell twisting an argument from officials of Scotland against executing the King, claiming that they could no longer protect the true religion by allowing Charles to live. By referring to their main objective, knowing what could convince them, he persuaded them that they were no longer bound by their promise to keep Charles safe. This is an example of Cromwell seemingly just adhering to his religious beliefs, but with an underlying motive.*

On other occasions, period knowledge was used in a stereotypical way. This was the case where a single, universally held belief in Divine Right was assumed as in Kirsty's (Y9, NRS) comment:

*All religious people then believed in the 'divine right' meaning God chose the king as a representative of God. No strong religious man would ever criticize someone who God chose.*

There were examples, however, of students recognizing the need for caution and reviewing initial inferences in the light of period knowledge. In considering Source E, Sadie (Y13, RS, TA) initially considered the case that Cromwell may have been just trying to persuade (referring to the circumstances to explain his need to do this) but she then applied knowledge of the context of ideas and of Cromwell's particular situation to explain why Cromwell felt passionately about the issue and seemed to imply that his sentiments were genuine. (This interpretation of her comments is supported by her overall conclusion.)

*Looking at the source, 'Cromwell thought that as the King had broken his trust' [...]. It's quite debatable, Cromwell's motives in this instance because [...] the move to execute the King was unpopular as only 68 judges turned up, so Cromwell might be trying to persuade people and acting as a politician, rather than a genuine religious man [...]. But then again it could be said that Cromwell believed in the Divine theory that God had given the King his post and part of his post and his responsibility was to conform to God's will and the King had broken his trust. By setting up a second civil war he was going against the will of God and he wasn't doing what God wanted of him [...]. That particular sentence, 'This ought to be punished more than any other crime', shows that Cromwell felt quite passionately about this and maybe it was because of the religious element to it and the fact that the King had to act in a way that God would approve of.*

Sadie was more cautious about her inference than Frances or Kirsty. Everyday or stereotypical empathetic ideas often led to inferences being drawn without question which were not therefore subjected to review. Students who reflected on initial inferences in the light of a range of knowledge made more effective use of the sources and were often more tentative in their conclusions. Some students also were aware of different views being held in the same period and thus did not immediately infer that conflict with a commonly held belief was evidence of insincerity.

There is no reference to the importance of applying empathetic understanding to the use of sources in any examination board mark schemes or in National Curriculum levels of attainment. If students were aware of the importance of reflecting on this type of conceptual understanding in their use of historical sources this could lead to the construction of knowledge that would have greater validity.

## The Relationship Between Different Types of Conceptual Understandings

The most effective use of sources occurred when different types of conceptual understandings were combined. Advanced conceptual understandings of 17th century religious and political ideas enabled students to extract deeper meanings from the sources. Conceptual understandings of empathy meant that some students were aware that there may be more to these ideas than what they already knew and the deeper their understanding of evidence the more opportunity they had to extend their knowledge through inferences drawn from the sources.

Thus the drawing of conclusions from historical sources does not appear to be a matter of applying "skills" or using "processes" in any sort of algorithmic way. It involves drawing on a complex range of understandings related to the discipline of history. This would seem to fit with the conclusions of Bailin *et al.* (1999) relating to critical thinking. They argue that critical thinking is not a matter of applying certain skills, processes or procedures and that skilled performance in it cannot be separated from knowledge. Proficiency involves the understanding of the various principles which govern good thinking in particular areas, many of which are domain specific.

## Students' Views on the Nature of Historical Knowledge

Think-aloud students were asked at the end of the task why they thought other students had reached different conclusions from the same sources and whether there was any way of judging between conclusions. Most explained different conclusions in terms of 'opinions' (variously defined) brought to the task and had little idea as to how it could be argued that one conclusion was more valid than another. The emphasis on 'opinion' was consonant with the findings of other research (e.g., Lee, 1998; Lee & Shemilt, 2004; Levstik & Barton, 2008). If students feel that the knowledge they construct from sources is mainly the product of opinion and are unable to defend their conclusions, their application of "skills" and "processes" would seem to be of limited value. However, students who had similar views on the role of opinions had in fact shown very different degrees of sophistication in the ways in which they had used the sources.

Some had reached much more defensible conclusions than others, even though the students themselves did not seem aware of this. The view that 'opinion' plays such a large role may have been encouraged by an educational culture in which students are credited for forming opinions without sufficient focus on the nature of the reasoning used to support them.

If students were more aware of the complex methods used to establish different types of conclusions from historical sources and the range of conceptual understandings involved, they would be in a better position to make reasoned judgments about the nature of the knowledge achieved as a result. In turn, if students believed that the use of certain strategies could enable them to make more valid claims, they might have more of an incentive to consider alternatives and search for knowledge that would help them to decide between them.

## Implications for Assessment

This research suggests that there needs to be a shift in assessment from an emphasis on skills and processes to a focus on the validity of the knowledge constructed. Comprehension is seen as a low level "skill" in GCSE and A level mark schemes but if students are to draw valid conclusions it is very important to interpret appropriately to the historical context which can involve complex thinking. Evaluation is often seen as a higher level "skill" but many different understandings can be employed in an evaluation leading to conclusions of varying validity. Thus instead of assessment taking the form of identifying students with a particular level of performance, the various elements that contribute to good responses need to be acknowledged. Key issues appear to be:

1. The nature of contextualization, involving both the range of relevant issues considered and the substantive conceptual understandings shown.

2. The use of the sources as evidence including the way in which meaning is worked out; the use of the sources in relation to each other; and the way in which specific inferences are drawn, taking account of the nature of the sources and their provenance.

3. Empathetic understandings, involving consideration of period perspectives, an awareness of their variety and the judicious exercise of caution.

The combination of substantive, empathetic and evidential understandings displayed in the research task varied considerably from one student to another. Moreover, students frequently demonstrated different types of understanding across the task. This suggests the need for a degree of subjective judgment in assessing the historical validity of a response as a whole. The nature of substantive understandings employed will vary from one task to another so that care needs to be taken in the use of generic mark schemes.

Such assessment should encourage students to reflect more on their own thinking and to see that some conclusions can be much more readily defended than others by a careful consideration of criteria appropriate to the context. Thus, it should equip students with understandings which could be transferred to other contexts far more productively than assessment based on narrowly defined skills.

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## APPENDIX 1: Evidence Task

### Execution of Charles I

***Task - Why did Oliver Cromwell support the execution of Charles I?***
Historians who have answered this question have reached different conclusions.
As you read Sources A to G and the background material you have been given try to decide whether one of the following two claims
stands up better in the light of these sources. You should consider the sources, background material and anything else you consider
relevant in order to reach your conclusion.

1. **Cromwell's words and actions in the months leading to Charles I's execution show that he was a deeply religious man who wanted to do what he felt God wanted**

2. **Cromwell's words and actions in the months leading to Charles I's execution show that he was a cunning politician who was prepared to use religion to support his ambition**

- If you think one of these claims stands up in the light of the sources, say which and explain how you think it can be supported by the sources.
- If you think neither is satisfactory, you may suggest your own statement and explain how you think it can be supported by the sources.
- Before starting to write, you should read *all* of the sources carefully and consider *the set of sources as a whole* in order to reach your conclusion. You may write notes on the sources if you wish.
- You should also consider the time-line of events, read the background information and use any other knowledge you consider relevant.
- When you write up your answer, you should explain your views as fully as you can, making reference to each of the sources.

*Background to the trial and execution of the King*[i]

> **Source A: From a book with the title 'A Faithful Memorial of that Remarkable Meeting of Many Officers of the Army'
> written by William Allen and published in 1659. This is an account of a meeting for prayer held by members of
> Parliament's army at Windsor in April 1648 at the beginning of the Second Civil War.**
> *Lieutenant-General Cromwell earnestly advised all there present to think carefully about what we had done to see if we had done
> any wrong... God directed us to realise that we had done wrong to try to reach an agreement with the King [Charles I] and his
> advisers the year before... God also enabled us then, after seriously seeking his guidance, to come to a very clear and 'joint
> decision... God showed us that it was our duty, if ever He brought us back again in peace, to put Charles Stuart [Charles I],
> that man of blood, on trial for the blood he had shed, and harm he had done to the greatest extent possible, against God's
> cause and people in these poor nations.*

In August 1648, at the Battle of Preston, Cromwell defeated the Scots who were fighting on behalf of Charles I.

> **Source B: From a letter from Cromwell to the Speaker\* of the House of Commons following his victory over the
> Scots at Preston. The letter was written on 28 August 1648**
> *\*The Speaker makes sure debates in the House of Commons stick to the rules.*
>
> *Surely, Sir, God has given us this victory [over the Scots who were fighting for Charles I], and wherever anything in this world
> is raised up high, or raises itself up, God will pull it down... It is not fit for me to give advice, nor to say a word about what use
> should be made of this victory except to ask you, and everyone that believes in God, to do the work of God in seeking the peace
> and welfare of the people of this land.*

Some leading members of the army now said that they should put the King on trial.

> **Source C: From a letter written by Cromwell to his cousin, Colonel Robert Hammond, Governor of the Isle of Wight,
> who had the responsibility for keeping Charles I a prisoner. The letter was written on 25 November 1648**
> *God brought Charles Stuart [Charles I] to you as a prisoner. Consider how God has ordered him, and affairs concerning him:
> and then tell me, whether there be not some glorious and special purpose in the events that have led to Charles Stuart being
> a prisoner. Put to one side your own opinion and ask God to teach you what this purpose is.*

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i.   In the task presented to students, the sources appeared on one A3 sheet. This is not possible here because of the need for wider margins.

The majority of MPs in Parliament were opposed to putting Charles I on trial but a member of the army, Colonel Pride, organised a 'purge' of Parliament on 6 December so that those who would oppose the trial of the king were kept away. Cromwell was not in London when this happened but returned soon afterwards.

> **Source D: From a report published in 1649 by Clement Walker, an MP, of a speech made by Cromwell in the House of Commons, 26 December 1648**
> *When the House of Commons first discussed the proposal to execute the King, Cromwell stood up and told them, that if any man had deliberately planned the execution of the king, he should think him the greatest traitor in the world. However, Cromwell said that since God had directed events so that it was clear they had to do this, he should pray God to grant His blessing on what they proposed to do.*

Those who were left in Parliament set up a High Court of Justice. They appointed 135 men as judges to try Charles I but only 68 turned up when the trial began. Cromwell was one of the judges. The judges acted both as judges and jury.

> **Source E: From a book with the title 'History of My Own Time' by G. Burnet that was published in 1723. This is a report of an account given to Burnet by General Drummond of the Scottish army who was present when officials from Scotland argued with Cromwell about putting Charles I on trial. Cromwell argued for the trial of the King and the officials from Scotland argued against it.**
> *Cromwell thought that as the King had broken his trust, this ought to be punished more than any other crime. Cromwell said that the Scots had made a solemn promise to keep the King's person safe in order to protect the true religion. Cromwell claimed that it now appeared that they could not protect the true religion without removing the King, so he argued they were no longer bound by the promise they had made to keep him safe.*

On the 27 January, the High Court of Justice pronounced the King's guilt. 59 judges, including Cromwell, signed the King's death warrant, the document which said he should be executed. Charles I was executed on 30 January 1649. In 1660, Charles I's son, Charles II, was put back on the throne. He issued a general pardon to most of those who had opposed his father but did not pardon those who had signed the King's death warrant. 12 of them were executed.

> **Source F: From a book with the title 'The History of the Rebellion and Civil Wars in England', written by Edward Hyde, Earl of Clarendon between 1646 and 1674. Hyde is here reporting what Colonel Ingoldsby claimed when Charles II was made King in 1660. Colonel Ingoldsby was one of those who signed Charles I's death warrant.**
> *Colonel Richard Ingoldsby stated that, although he was appointed a judge of the King, he was never once present at the King's trial, as he always hated the action of putting the King on trial in his heart... Those who had tried the King found him guilty and pronounced a horrid sentence that the King should be executed. The day after this, Ingoldsby said he came into the Painted Chamber where he saw Cromwell, and the other judges. They were then assembled to sign the warrant for the King's death, - but Ingoldsby said he did not realise this when he came in. Cromwell drew Ingoldsby by force to the table; and said that, though he had kept away from him so far, he should now sign the King's death warrant as well as they. Ingoldsby said he refused with great passion, saying he knew nothing about it but Cromwell and others held him by violence and Cromwell, with a loud laughter, taking Ingoldsby's hand in his, and putting the pen between his fingers, with his own hand wrote Richard Ingoldsby, while Ingoldsby made all the resistance he could.*

> **Source G: From a book with the title 'Memoirs of the Life of Colonel John Hutchinson', by Lucy Hutchinson, his widow. It was written in 1664 - 67 but not published until 1806. Colonel Hutchinson had also signed the King's death warrant.**
> *The gentlemen that were appointed judges of the King... believed in their consciences that, if they did not bring the King to justice, God would hold them guilty of all the blood and ruin which would follow if they allowed the King to escape… Some of them afterwards made excuses and lied about themselves. They said they feared the army, and were too much persuaded to support the execution by Cromwell and the like. But it is certain that all men were left to their free liberty and were neither persuaded nor forced... In 1660, Ingoldsby, with many tears, said he was sorry for that murder, and told lies about how Cromwell held his hand, and forced him to sign the death warrant.*

These sources have been simplified to make them easier to understand.

**Students were also presented with a time-line of events and information about the authors of Sources A, D, E, F and G.**

# Perspectives of Historical Consciousness and Learning in the Narratives of Brazilian's Young.

Maria Auxiliadora Moreira dos Santos Schmidt[1]

*Abstract - Central to historical learning and thinking is the development of historical consciousness and understanding in terms of personal identity. The dynamic involved is a central factor in creating personal mental models that provide pupils with patterns of interpretation. The focus of this paper is the form and nature of pupil narratives. Research carried out with three classes of Brazilian pupils indicates that the current pattern of history pedagogy fails to develop in pupils either an understanding of their own identity via personally constructed national or world narratives or the conceptual tools that thinking historically would enable them to do so.*

*Keywords - Brazil, constructivism, global history, grounded theory, case-study, historical consciousness, history - global, history - national, identity, Lee, mental models, narratives - historical, national history, patterns of learning, Rüsen, situated cognition, story.*

## Introduction

The reflections presented here in this work are the results of a study since 2005[2], in reference to a curriculum development project "Learn to read[3], learn to write in History". The purpose of this project is to investigate and systematise learning presuppositions in the formation of the historical consciousness, having as a fundamental reference point the nature of History as a discipline, i.e. form of knowledge.

According to Rüsen (1993), historical learning is "human consciousness related to time, analysing time, acquiring the competence to give sense (significance) to time and develop this competence"(1993, p. 52). To Rüsen this learning, which constitutes historical consciousness, is in evidence when the subjects narrate their own history, constructing coherent ways to communicate their historical identities. This is possible because narratives are products of the human mind and by their meaning, the subjects relate place and time in way which is meaningful to themselves.

In the context of Rüsen's (1993) propositions, learning is a dynamic process in which the learner changes because something is acquired, an insight or ability, or both. In historical learning, "history is acquired, because the objective facts, things that happened in time, become a matter of conscious knowledge. They become subjective. First is the acquisition of experience during time; second is the objective analysis required by the discipline of history. This does not means that history has to be presented in a fragmented and dry way and simply reproduced by the pupil. This also doesn't mean that history has to be simply delivered to the learner. It involves the development of self knowledge expressed by the person's historical narrative.

In this way, while students learn history they can improve their ability to find meanings and locate themselves historically. In this dimension of learning, the developing experience and knowledge is transformed in a productive change of the model or pattern of interpretation. Such models or patterns of interpretation integrate different kinds of knowledge and experiences from the human past in a whole comprehension - or "picture of history". They give the facts a historical meaning. They set up meanings and make possible differentiations according to the conception of what is important.

> *Having these reflections as reference points, a proposal was developed to check. By analysing their narratives, we aimed to find out the level of their abilities to give meaning to time and place, indicating the presence of certain types of historical consciousness* **(Rüsen, 1992).**

This investigation was pertinent because the students in the participating schools had become familiar with narrative approaches. These were introduced as a result of discussions between history teachers in 2003 and 2004 during the process of developing the history curriculum for Araucaria city in 2004. (Diretriz Curricular da Historia do Municipio de Araucária).

One aspect of the curriculum is the emphasis on the ability of children and young people to construct their own historical narratives in order to develop historical consciousness.

Thus, this paper presents the results of an investigation made in three public schools in Araucaria city, Paraná State, Brazil, in 2005. The purpose was to evaluate the narratives of Brazilian youths, investigating how they read, write and learn history, comprehending and making sense of their country's history in the global context.

## Methodology

This is a qualitative research case study, based on grounded theory approaches. The participating schools have the same educational system, the same curricula, the same number of historical classes each week and teachers who teach in the same way.

School "A" is in the urban area, in the vicinity of a road that connects Araucaria to the interior of Parana State. This school supports, using the municipal transport system, provides education for the students of rural communities around the city. In the morning the school teaches pupils up to the 4th grade; in the afternoon it educates children from the 5th to 8th grades.

Most of the young people and children who attend to this school are the sons of agriculturists and small farmers, cereal, cattle and vegetable producers. The students' families live in their own houses. Their access to information has been mainly through the radio (which most of the families have) and television. Access to computers and the internet are not common in these communities. In this school, the research was conducted with the 8th grade (35 students of 13 to 14 years old). The school has only one 8th grade class.

The school "B" is in a neighbourhood of workers and traders. There is also a fairly high unemployment rate. The school accepts the sons of these workers in the morning, afternoon and night. In the morning and in the afternoon it takes children and teenagers, up to the 8th grade. At night the school has students from 5th and 8th grades. Another reality of this school is the high level of urban violence which affects the community. In this school, the the research involved two afternoon 8th grade classes 8th grade A and 8th grade B, in a total of 49 students.

The school "C" is in a neighbourhood consisting of home owners with long term mortgages. This neighbourhood developed because of the migration of families mainly from the interior of Parana State. It is a relatively new neighbourhood, about 10 years old, but it has the same problems as the location of School B, mainly urban violence.

In this school there is education up to the (8th grade) in the morning and in the afternoon. This school has two 8th grade classes in the morning with 52 students who participated in this research.

Rüsen's perspective (1992; 1993; 2001) is fundamental to understanding the importance of narrative in personal development because he relates history to every day human life, arguing that time is an important dimension of consciousness. When people create an interpretative picture of what they experience they do this in the context of time and change and this which helps them to make their own decisions. Rüsen argues that historical consciousness may be described as an unique consciousness operation and a coherent thinking process and that this synthesis is achieved through discussion of actions and by the historical narrative.

Rüsen (2001) argues that narrative, as a constituent element of historical consciousness, draws upon memories to interpret temporal experiences. In this way, the past is like a forest in which people, through historical narratives, here echoes from the past which help them to understand the present and how it is shaped from the experiences of the past which allows them to see meaning in the future. (Rüsen, 2001: 63).

However, it is not only through memories that one can recover the past. However historical consciousness penetrates into the past, the impulse to re-visit the past is always given generated by present. Historical consciousness is the place where the past is taken to speak and it will only speak when questioned: and the question that makes it speak originates from the lack of orientation in contemporary life when divorced from our personal temporal experiences. It is essential to deal with an interpretative memory that makes the past present, here and now.

A second condition stated by Rüsen (2001) is the "representation of continuity", which he defines as an intimate interdependency between past, present and future that serves to direct actual human practical life. The historical narrative "turns the past into the present in a way that present time appears as a continuation into the future" (Rüsen, 2001: 64).

The criteria of the continuity of the representations forms the third condition for the narrative to be an intellectually decisive operation so as to constitute the historical consciousness. The unifying element in the process of relating present, past, future, by means of the narrative a person's fear of being of no significance and so the effort to affirm personal identity.

Rüsen's reflections about the representation of continuity through the narrative were fundamental to structure of the investigation's research methodology and also because in the *Diretrizes Curriculares de Historia do Municipio de Araucária*, the result of the collective work of a group of teachers in 2004, places historical consciousness at the centre of historical understanding and learning.

The research methodology also had as a theoretical reference the studies of Husbands (2003) about students' historical narrative. For Husbands, unlike historians, students in the schools don't research to produce "new" knowledge based on evidence and historical narratives, but they produce new personal historical comprehension. Thus, one of the ways that the students and teachers give meaning to the past is by thinking about the construction of narratives or versions of this past.

According to Husbands (2003), in history teaching, the use of narrative in the classroom and the relation that the student establishes with it has been constantly associated with active didacticism of the teacher and to passivity of students. He draws attention to the over-simplification that teachers constantly outline about characters and historical contexts, making caricatures by presenting them as archetypes of good and evil. This reduction creates major difficulties for the validity of students' understanding in relation to existing narratives, including the teacher's, and prevents them constructing meaningful narratives, i.e. the construction of historical comprehension. The narrative therefore, is not an end by itself, but its role is to contribute to producing an understanding about the past, to make the thinking involved in learning active.

In this way, the significance of narrative needs to be explored in history classes because to narrate means telling and re-telling stories.

> *"It means telling stories, but also asking the students to re-tell them: submitting them to a critical examination, creating a sense of what I've called verisimilitude and of its logic. It involves a constructively sceptical doubt about the nature of the stories that we tell. It means connecting stories with organisational principles - the cause, ideas, continuity, changes - of the complex historical language "* **(Husbands, 2003, p. 39).**

Also concerning the investigation of pupils' ideas in relation to history, Lee (2001) draws attention to the essential analysis of the substantive concepts and the second orders concepts:

> *"substantive concepts are the one that refers to history content, for example, the concept of industry. Second order concepts are the ones that refer to the nature of history, for instance, explanation, interpretation, comprehension"* **(Lee, 2001, pp. 13 - 17).**

Taking this theoretical position, two questions were posed, to be investigated through the narratives of pupils. The first one aimed to check the form and nature of national narratives:

> **Task 1** *"Imagine that you are in a summer camp where there are youths from every part of the world. One day, you were challenged to tell the history of your country. How would you tell them about Brazilian History in the last hundred years?"*

The second question investigated the production and comprehension of world's narratives by the young.

> **Task 2** *After you have heard about the History of different countries, the other students thought that it would be interesting to hear how each one could tell the world's History. How would you tell Earth's History in the last hundred years?*

The tasks were given during the classes taught by the teachers of the 8th grade students. There was no previous warning to the students that on a specified day they were going to be asked to produce these narratives. The pupils completed the activities during the normal course of a day at school. This procedure was to ensure the authenticity of the narratives' authorship, i.e. to ensure that each pupil produced their own narrative.

## Analysis of the Results

We adopted a proven protocol for analysing the pupils' narratives. To analyse historical narratives Prost (1996) suggested a classifying them into report, picture and plot narratives.

- A report narrative is characterised as essentially chronological, involving at least two events or situations arranged in sequence: the descriptive or structural form can then result in a report.
- A picture narrative is an historical exposition that presents the coherence between events and situations while searching for answers as to their causes.
- A plot narrative is different from the report and picture narratives. It answers a question that tries to uncover the conflicts involved and not the events and situation. In the historical plot it is necessary to choose a theme, a chronological outline, the actions of the actors and the episodes.

Two other structural categories to analyse the historical narratives were developed by Wertsch (2004, pp. 49 - 62): the structure of the specific narrative and the structure of the schematic narrative: The specific narratives include explanations about a collection of events. Examples of this kind of narrative can deal with substantive concepts, like wars, revolutions and other political events that are almost always found in education method books. The schematic narratives have abstract and generalised functions, forming schematic thought structures. They are not types of universal prototypes, but belong to particular narrative traditions that may be different from one context to the other.

In the perspective of narrative analysis constructed by the students, Barca and Gago (2004, pp. 38 - 39), developed studies about past historical comprehension by Portuguese youths. They elected three categories for the analysis: Fragmented Comprehension, Restricted Comprehension, Global Comprehension. For the first category they categorised narratives that expressed dispersed ideas, presenting flaws in comprehension. In the second category students re-form the information but focus on only one main piece of evidence, making almost exclusive use of expressions contained in the texts and sources. In the third category students showed overall understanding, discriminating between the different narratives and noting disparate elements while reconceptualising the narrative in relation to their own experience.

## Conclusions

In the analysis of the first task, about national narratives, it indicated the presence of various structural elements, some of them outstanding:

TABLE 1: Task 1 - National Narratives - Structural Elements

| Very Frequent | | Medium Occurrence | | Limited Occurrence | |
|---|---|---|---|---|---|
| 1. Slavery/ Slavery's freedom/racism | 49 | 1. Industrialisation | 18 | 1. Gender relations | 9 |
| 2. Wars and internal rebellions | 44 | 2. Economic crisis | 16 | 2. Dictatorship | 8 |
| 3. Wars and external rebellions | 43 | 3. City development | 13 | 3. Money (currency) change | 7 |
| 4. Technology | 36 | 4. Brazil's Independence | 10 | 4. Immigration | 7 |
| 5. Portuguese/Colonisation | 35 | 5. Heroes' action | 10 | 5. External Debt | 7 |
| 6. Social problems | 30 | | | | |
| 7. Government change | 28 | | | | |

Some structural elements such as debt, exportation, study, ecological problems and democracy also appeared sporadically in a few narratives. Some substantive ideas predominated:

TABLE 2: Substantive Ideas Privileged In The Narratives

| Very Frequent | | Medium Occurrence | | Limited Occurrence | |
|---|---|---|---|---|---|
| 1. Corruption | 52 | 1. Conformism | 18 | 1. Education | 5 |
| 2. Soccer | 23 | 2. External Debt | 11 | | |
| 3. Urban Violence | 22 | | | | |
| 4. Poverty | 21 | | | | |

In relation to the structural elements of the functions of past/present and future relationship and the ones that give sense to the national past, some stood out:

TABLE 3: Function/Senses of Present/Past/ Future Relationship

| | |
|---|---|
| 1. Technological Evolution/Scientific/of habits and industrial progress | 46 |
| 2. Hope about the country | 40 |
| 3. Presentism | 30 |
| 4. Domination/Resistance | 8 |
| 5. Pessimism | 12 |

To analyse the types of narratives we adopted Prost's (1996) categorisation into report, picture and plot and Barca's and Gago's (2004) characterization into fragmented, restricted and global narratives.

TABLE 4: Type of Narrative

| Report | 108 | Picture | 7 | Plot | 21 |
|---|---|---|---|---|---|

The plot narratives' dominant themes were about

| | |
|---|---|
| *Black and Indian relationships* | *6* |
| *Environment* | *1* |
| *Social and political rights* | *13* |
| *Family and violence* | *1* |

TABLE 5: Narrative Characteristics

| Fragmented | 86 | Restricted | 15 | Global | 22 |
|---|---|---|---|---|---|

The dominant structural element in the national narrative was the triad of "slavery/slavery freedom/racism". This was framed in the same category because it was frequently repeated. From the narratives it is possible to see significant links between present, past and the future in the research cohort.

Therefore we can affirm that it empowers the writing of history from a specific idea of continuity because the relationship among the three temporal dimensions (past/present/future) are represented organizationally in the narratives, pointing out, for example, that the young understand that racism and Afro-descent has a connection with it's origin in past slavery in Brazil and the treatment of slaves after their emancipation. In this way, they do not present contemporary prejudiced analyses. Instead, they use the notion of causality and resort to the past to explain the contemporary world and experiences. This could raise the question: why is historical consciousness manifested so strongly in this subject and not in other structural elements?

Other structural elements that indicate changes to the young students are war and rebellions, internal and external. This may demonstrate the influence of the narratives of the didactical manuals which give value to these events and also indicate the presence of these structural elements as 'privileged' content in the curriculum.

Although Portuguese colonisation appears as a structural element in the national narratives with a high frequency, it was not used to contextualise national history in relation to global history. Instead, it appeared in an ad hoc way in the narratives, with emphasis upon heroes' actions, for example in one student's (Gisele, 13 year old) narrative:

> As everyone knows, Brazil was discovered by Pedro Alvares Cabral. When he arrived here, there were only Indians and forests. With his arrival, Indians were obliged to leave their lands.

Concerning the type of the narratives, there was a predominance of the fragmented reports in a little over 50% of the total. This raises the question of what is meant by the concept of "learning history" and historical cognition in history classes that do not contribute to pupils' construction of a global historical narrative. Also, it does not contribute to pupils acquiring content or knowledge of the nature of history as it affects their lives. This can be explained because teachers are still very much tied to didactic books, predominant narratives and the fact that attention to substantive concepts and second order ideas are not in evidence in history teaching. We need to encourage investigations which allow interventions to address this problem.

Corruption, soccer and urban violence were the most frequent substantive concepts in students' narratives. This may indicate the presence and the strong influence of daily life in their narratives' construction. Corruption and urban violence are resorted to because they are present in media, especially on TV. This violence is also present in the student's real lives because it permeates their communities.

With regard to the relationship between present/ past and national future, a sense of the evolution of technologies occurred frequently. This may infer that the students have a clear perception that technology developed significantly in the last century and will continue to do so.

The past as a hope appeared frequently in the national narratives, which may indicate that the pupil as a historical being is an element in the present so as to live positively and have the right to work, an education, health and to participate on the construction of a better country, showing a balance between good and bad perspectives as in Alessandra's narrative (14 year old, 8th grade):

> I think I would tell about the external debt that Brazil has to foreign countries like the United States of America. Because our country owes too much and if it pays all the debt, there will be not enough money to investments, buildings and providences that the government has to take to have enough jobs so that people would earn money to sustain themselves. But also, otherwise our country would never be independent.

TABLE 6: Task 2 - World's Narratives - Structural Elements

| Very Frequent | | Medium Occurrence | | Limited Occurrence | |
|---|---|---|---|---|---|
| 1. Wars and revolutions | 71 | 1. Economical disparities between countries | 14 | 1. Hunger | 9 |
| 2. Technological evolution | 47 | | | 2. Violence that rebounds in Brazil | 7 |
| 3. Natural catastrophes | 40 | 2. Social disparities | 11 | | |
| 4. Terrorism | 39 | 3. US superiority | 10 | | |
| 5. Heroes' actions | 24 | | | | |

TABLE 7: Substantive Ideas in World's Narratives

| | |
|---|---|
| 1. Violence between countries | 42 |
| 2. Technology x Evolution | 39 |
| 3. Disparities between countries | 13 |
| 4. Sports | 12 |
| 5. Technology x War | 9 |
| 6. Social disparity | 6 |
| 7. Socialism x Capitalismo | 4 |

TABLE 8: Functions/Senses of the Relationship Present/Past/Future

| | |
|---|---|
| 1. Conflicts | 46 |
| 2. Technological evolution/habits | 33 |
| 3. Presentationism | 35 |
| 4. Relationship between national and world's history | 12 |
| 5. Nature's Protection | 10 |

TABLE 9: Types of Narratives

| Report | 112 | Picture | 15 | Plot | 9 |
|---|---|---|---|---|---|

The plot narratives dominated in the following topics:

> Points between rich and poor 5
> Preservation x violence 1
> Technology x poverty 2
> Tragedies 1

TABLE 10: Narrative's Characteristics

| Fragmented | 65 | Restricted | 38 | Global | 33 |
|---|---|---|---|---|---|

With regard to the structural elements in world narratives, wars and revolutions dominated, which also demonstrates the dominant influence of the didactic manuals and curriculum narratives. As in the case of national narratives, the world's narratives may also demonstrate the media influence because in their recent lives, many of these young people have seen live transmissions of wars in Afghanistan, Iraq and the Middle East, among other conflicts. Also terrorism, the present form of conflict in the daily news together with the natural catastrophes, appears frequently.

The technological revolution and cultural changes appeared more significantly in the world narratives than in the national narratives. Beyond that, they are related to the martial advances in a natural way, as Sebastião's narrative illustrates, (13 year old, 8th grade):

> In the last years, many things happened in the world, like: the invention of the atomic bomb, cell phone, TV, the attack on the twin towers in NY, the man on the moon. There are also the invention of the car, motorcycle, tractor, truck. The first clone. Also the invention of airplanes, helicopters...

The heroes' actions appeared in the context of sportsmen such as Ayrton Senna, Pele, the Pope, the President of the United States and Bin Laden, and also to characters on the TV.

Concerning the types of narratives, the fragmented reports predominated, leading to the same questions as the national narratives raised. However, there was a significant increase, in the world narratives, of the picture form in relation to the national narratives.

This indicates a higher facility for young people to engage World's History through establishing causes of events, such as the technological revolution and the war, among others.

In the world narratives students were emphatic about the importance of valuing nature especially nature conservation and ecological problems. As early as 1988 SOFFIATI drew attention to the absence of the theme nature in the didactical text books, beyond proposing its inclusion in the history books. Therefore, it is an issue which needs to be resolved, because young pupils and teenagers are actively concerned by current issues in relation to nature.

In the establishment of the relations between national narratives and world narratives, a detail that attracted our attention was the students that presented a global report in the national narrative and a fragmented report in the world's narratives or vice-versa, showing that there is no homogeneity here, and how little connection there is between the two narratives.

## Conclusion

The analysis of the results of this study indicated some general considerations that can be suggested, independently of the schools investigated. Among them, we emphasise:

- There is a strong presence of present mediations as structural elements in the student's historical narratives.
- The structural elements of the narratives in the didactical manuals - text books - have great influence in the organisation and characterisation of the types of narratives of these students.
- The predominance of fragmented narratives may indicate the necessity to develop a new type of historical cognition informed by new conceptions of what is "learn history".

With regard to the continuity of the investigation, the study pointed out some main possibilities:

- Bibliographical investigation with the objective of systematising the learning of concepts present in the teaching manuals and curriculum proposal.
- To undertake research with history teachers about the meaning of to "learn history".
- History class observations to analyse the narratives during the class period.
- Analysis of different types of narratives in the teaching manual and those of students.
- It is possible to conclude this study by saying that investigations in the field of history education are opening possibilities and themes to be researched together with our students, and especially with the history teachers interested in finding out more about consciousness.

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# Some General Indications on Young Children's Historical Thinking when Working with Primary Sources

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*Abstract* - *The paper examines the learning of pupils when working in groups on primary sources with or without teacher intervention. Research involved pilot and control groups. The teacher intervention pilot groups performed markedly better than the control groups. Teachers provided the support for genuinely scaffolding learning, working collaboratively with the pupils so that they would achieve at a higher level than possible when working independently, i.e. scaffolding. Learning was a continuum, a progression, reflecting Bruner's concept of the spiral curriculum. Significant was the enhanced level of thinking skills developed related to the sophisticated pedagogy used to ensure that the pupils worked optimally upon their primary sources.*

*The research also corroborated earlier research findings that low ability pupils perform at a much higher level in such groups than when working autonomously. Also, that their learning develops when grounded in their current cultural interests, concerns and knowledge, i.e. the social, familial, personal contexts. Learning was closely linked to the linguistic demands made and the ability to engage in discursive dialogue. As such, group work in history can actively promote contextualized development of language, drawing upon the registers involved as well as the specialized language that History develops. The paper concludes that the research, linked to previous studies, shows that:*

1. *Actual handling of sources enhances historical thinking skills.*
2. *Transfer of skills does occur in history.*
3. *Analytical thinking in history reflects everyday thinking skills.*
4. *History thinking occurs quite early.*
5. *Handling historical sources can enhance performance of 'low achieving' pupils.*
6. *Group work creates the right environment in history for the right interaction to occur. This interaction produces the 'talk' that in turn produces the learning.*
7. *Social and cultural factors are playing very important roles as children make attempts to make sense of history.*

*Keywords* - *Bruner, convergent thinking, deductive thinking, logical thinking, divergent thinking, group work, historical learning, inductive thinking, intervention strategy - teacher, learning strategies, learning, low ability pupils, observation techniques, pedagogy, primary sources, procedural knowledge, qualitative research, quantitative research, scaffolding, skills - thinking skills, skills - transfer of, socially contextualized learning, sources, spiral curriculum, teaching - sophisticated, teacher guidance, thinking skills, Vygotsky, Zone of Proximal Development - ZPD*

## Introduction

A number of research studies conducted by the author (see Vella publications in reference) during the past 8 years focused on pupils' activities when handling primary historical sources. However, while the groups of pupils working with the historical sources were being observed, alone and with adult intervention the following indications as to how children were making sense of history came to light. The following is an attempt to present these general conclusions together.

## Handling Primary Sources Helps Children's Learning

The ideas children produced autonomously when presented with sources were compared with the ideas they offered with the same sources after undergoing intervention sessions with the researcher. There was an attempt to see whether these ideas were modified in any way. The interventions targeted mainly basic observational skills, teaching pupils how to look at historical sources in a better way.

The tasks carried out during the intervention sessions focused on sharpening pupils' observational skills as they handled primary sources. These observational skills which might be described as mere 'technique' involved using various historical objects, pictures or writing. For example exercises involved using a magnifying glass, dividing copies of paintings into segments, tracing photos, trying to write with feathers, creating maps from written sources and picking out particular words or numbers.

Sometimes besides the historical artefacts the researcher also used everyday objects too; for example a MacDonald's hamburger box, a scarf and an orange squeezer, pupils experimented with these objects as they tried to see how heavy they were, what they were made of and whether they could come apart.

Evidence from this research, which used both qualitative and quantitative methods to assess children's comments, shows that the actual manipulation and studying of the appearance of the sources that went on in the intervention helped pupils' reasoning and deductive skills. Other research (Cooper, 1995; Nultry, 1998; Smith & Holden, 1994; Blyth, 1995; Durbin, 1991; Avon L.E.A., 1982; Hawkes, 1996) also substantiates this claim that in fact the actual process of using primary sources helps children's thinking. In my studies children only started to comment or commented much more on certain aspects of the historical sources after these intervention sections and when a scoring system was created to look at quality of answers this also revealed that as a total, in general post intervention scores were higher.

## Transfer of Skills

The skills learnt in the intervention session with the researcher were absorbed by the pupils and reused in the other sessions that followed. There are various indicators that this was happening. The spread of children's comments clearly shows that reference and information finding skills as well as other specific history skills and concepts such as concept of time, historical language, analysis of evidence, empathetic understanding and asking historical questions; generally started and continued to occur in the post-intervention session. In one study the children were first given an artifact, then a painting and finally a written document. It is interesting that the post-intervention scores for the written source are not as uniformly higher than the pre-intervention scores as those of the artefact and picture sources. The researcher attributes this to the fact that the sessions involving written sources occurred at the end of the research sessions with the pupils. These sessions had the effect of the previous sessions that came before them. Now it was not just the intervention of the written source that is supporting their learning but all the other interactions that had occurred with the artefacts and pictures in the two weeks before. Therefore they were already in a good position to analyse the written source in the pre-intervention because a transfer of skills had occurred.

The timing of the post-intervention session also makes a difference as to how much transfer and change one should expect as a result of intervention. In these research studies some cognitive benefits of the intervention were immediately evident but undoubtedly the full extent of the impact of the intervention sessions does not totally materialize in the first post-intervention sessions. One interesting study in young children's thinking in Physics (Howe, Tolmie & Rodgers, 1992) suggests that there is a delayed effect during which individuals recalibrate their thinking as a result of the intervention and in their studies a more sophisticated understanding of physics actually occurs two months later.

## Analytical Thinking in History Reflects Everyday Thinking Skills

The intervention was a very important element in these research studies however there is an important observation which cannot be ignored. This is the fact that history thinking skills although evidently more present in the post-intervention sessions, were also already occurring to one extent or another in the pre-intervention sessions before the intervention occurred. For example comments on age of object, describing actions of people in the painting and identifying words in written document. The pupils who participated in this research work had had little or no history lessons before. The researcher believes that this indicates that analytical thinking in history reflects everyday thinking skills which pupils already possess. Farmer & Knight (1995) and Nultry (1998) seem to be of this opinion too. Quoting Farmer & Knight, Nultry (1998) says that she too believes like them that "children's reasoning in history is barely different from their logical thinking in general'" (p. 21).

History is discursive in nature and the thinking skills necessary in history seem to be similar to vital thinking skills necessary for children to evolve if they are to live successfully within their culture. They are the precursors of induction and logic. Historical reasoning and analytical thinking in general are in fact similar, for example, understanding notions of time and change are necessary in everyday life, history just brings them into sharper focus.

This is not always the case for all subjects taught at school, for example, in science, learning may prove difficult because scientific observations are not always similar to everyday representations of the same phenomena (Driver *et al.*, 1994). Learning history in the classroom does not involve children entering an alien way of viewing the world, on the contrary they are entering a community of discourse whose tools they are already familiar with. The challenge is how to make this reasoning more sophisticated and to foster a critical perspective of both history and the world they live in.

## Historical Thinking

History thinking can occur quite early. In these studies there were many instances where the older children were using clearer and better structured sentences but sometimes they were essentially saying the same thing. This sometimes also happened between pre and post-intervention sessions when one compares the same children's responses. In this case it is not the age difference but the effect of the intervention that is producing more detailed outputs. Therefore because of the intervention or because of the age difference the responses are more complex but sometimes the concept and the basic ideas are still the same. This recalls Bruner's famous spiral curriculum and findings in this research supports the notion that children at any age are in fact in possession of powerful intellectual abilities even if the language tools are not yet sharpened. From the data in this research one can notice that the language skills were becoming more sophisticated the older the children got however the historical thinking was happening before. For example, the 5, 7 and 10 year olds all recognised that the artefact belonged to the past, even though the way they expressed this differed in sophistication.

Comparing the input of the 5, 7 and 10 year olds one can almost imagine Bruner's spiral diagram unfolding. The way the 10 year olds examined and interrogated the sources is qualitatively different to the way the 7 and 5 year old approached the same exercise. The support, the 'scaffolding' needed was different. The older the children were, the less guidance was needed from the researcher but with the right leading questions eventually all groups for example explained how a 19th century iron might be heated without electricity. This is also compatible with Vygotsky's ideas on children's learning. The pre-intervention sessions revealed the pupils' actual ability level, while the post-intervention sessions revealed the pupils' actual ability level, while the post-intervention sessions revealed their instructional level. The process that occurred during the intervention helped pupils to reach a higher potential. In Vygotskian terms one could say 'the zone of proximal development' was crossed, the adult guidance provided by the researcher and the peer collaboration of the other pupils made the difference between what the pupil could learn and contribute on his or her own and what a pupil could achieve and learn when instructed by somebody who knows more or who has greater skills.

## Enhancing Performance of 'Low Achieving' Pupils

While the researcher was watching the pupils working it was very difficult to say who was the weak achiever and who was the high achiever. (The children were often working in mixed achieving groups, consisting of one high achiever pupil, one average achiever pupil and one low achiever pupil, as classified by their class teacher.) This was also the case when one studies the video recordings and the transcripts of pupils' conversations. The difference between the pupils would probably have been immediately apparent had they been required to do traditional history teaching tasks, like for example writing a few sentences about this object. This seems to back the notion that children handling sources, an enquiry based approach teaching method, actually dissolves to some extent the achievement performance created by IQ differences. This is backed by Scott's findings back in 1978 where he found no correlation between IQ and history divergent thinking tests he devised for his research, while in the control group using traditional testing there was a significant correlation between IQ and these tests.

*"The IQ test basically measured convergent (i.e. right/wrong) thinking whereas the category scores given to the pupils' responses reflected their ability to give explanatory answers associated with a degree of divergent thought. From these results there appeared to be little or no correlation between these two abilities"* **( Scott, 1978: 95).**

This is also supported by John West findings in his project in Dudley (1974 - 80) where he reported that:

*"A striking aspect acknowledged by teachers and head teachers throughout the duration of the project on 'Children's Awareness of the Past' was the enhanced performance of children previously considered to be 'less able'."* **(West, 1981: 9).**

The emphasis in this research was on oral discussion and low achievers could be seen to be growing in confidence in verbal discussion and the valid nature of their contributions is indisputable.

## Group Work and Language

The significance of group work in all the sessions is clear. Pupils were evidently gaining concepts through discursive tools.

There are various reasons for placing pupils together in a group. One objective is to teach children how to co-operate in a team; however in these research projects, analysis of pupils' talk showed that they were not only sharing the materials but they were also sharing ideas. They were using their peers' talk to support their own thinking, in other words they were using each other as a learning resource. Research into peer collaboration supports this conclusion. The learning in the groups happened for various reasons; one suggestion is that learning is occurring because of cognitive reorganization caused by cognitive conflict (Perrot-Clermont, 1981) or that peer interaction is aiding individuals to integrate various perspectives when viewing a situation and this results in superior cognitive reasoning (Loomov, 1978; Inagaki, 1981).

The relationship between language and history learning has many facets. The interaction between the pupils was causing learning to occur however history can help pupils learn language itself (Hoodless, 1998). History is a discipline of a highly verbal nature and the statement that "a grasp of its terminology is obviously an important objective, contributing to achievement in all aspects of its study." (Coltham & Fines, 1971: 16) will always hold true.

## Social and Cultural Factors

A child's learning does not only involve him or her but the social context plays a large part and shapes their understanding. Social factors are clearly effecting children's responses, as they discussed the sources references to their family and culture are especially frequent and they also refer to television programmers. To cite just one example while discussing train fares, 10 year old Ruth says:

*"Miss, there's a film on BBC Prime, its called Dr. Beaton, its about a railway."*

This tallies with Barton and Levity's findings (1996), they found that family stories and activities and popular culture, especially television, were the important sources from which their pupils drew from when asked to place sets of pictures in chronological order. Despite the fact that they did not know dates and standardised expressions of time they could still place photographs in the correct order. Also, historical fiction was largely responsible, according to Barton, for students' understanding of historical causation. They based their explanations almost exclusively on individual characters. When asked to pin point significant historical events Barton & Logistic (1997) once again showed that at least in the case of America, relatives played an important role in determining students' historical thinking. Their knowledge of historical events was based largely on the living memory of the people (mainly relatives) they knew. The pupils in this research did this too, 10 year old Patrick often referred to relatives while he was talking and in this instant he is recounting one of his grandfather's stories to give historical explanations, obviously having heard him or his parents telling it several times:

*Written Source: Pre-intervention session - 10 year olds - Grade 7 Group 1 - Patrick, Joseph, Ruth*

| | |
|---|---|
| **Joseph:** | *What's one 'd', for example?* |
| **Researcher:** | *A penny* |
| **Ruth and Joseph:** | *How cheap* |
| **Patrick:** | *Because for those days it wasn't. My nannu (grandfather), for example, he used to be careful not to go up the* **Barrakka** *lift, he used to climb the stairs because 3 pence for them was worth a lot. You can buy a loaf, maybe.* |
| **Joseph:** | *I know for half a penny in those days you could get a comic.* |
| **Patrick:** | *And my family, they were the biggest family from my nannu and nanna. They had three children.* |

John West's findings with Primary English pupils produced quite similar results to this research as well as to Barton's study. West (1982) reported that historical background knowledge of young children was quite extensive:

*"...65% is acquired out of school. Through television, predictably, accounts for the lion's share (31%) with viewing ranging from 'Space Odyssey 2000' to 'Connections', a collection of other out-of school sources are equally influential (31%). These include: encyclopaedias, the Beano, great-grandad's reminiscences, educational cruises, cereal packets, the ubiquitous Project on Dinosaurs, Mum" summer photographs of the Acropolis, exhibitions at the V & A, the school trip to H.M.S. ' Victory', treasure-trove found by Dad's new metal detector, other past-times such as war-gaming, cigarette-card collections and biographical detail of all Confederate generals from Robert E. Lee to Errol Flynn" (p.17)*

It would appear that social and cultural factors significantly influence the way we try to understand history and thinking is very much determined by the social context.

## Conclusion

Basically this paper is suggesting the following indications that have emerged from observing children working with historical sources over a number of years:

1. Actual handling of sources enhances historical thinking skills.

2. Transfer of skills does occur in history.

3. Analytical thinking in history reflects everyday thinking skills.

4. History thinking occurs quite early.

5. Handling historical sources can enhance performance of 'low achieving' pupils.

6. Group work creates the right environment in history for the right interaction to occur. This interaction produces the 'talk' that in turn produces the learning.

7. Social and cultural factors are playing very important roles as children make attempts to make sense of history.

From these indications it is clear that children are not just individuals but people in their society, it is evident that historical knowledge is socially constructed and communicated. Observing pupils discussing sources revealed that one reason why learning was occurring, was because of the interaction between the pupils; pupils were gaining concepts through the talking. This research work also confirms that in history teaching it is the skills and concepts we should be focusing on and content-specific topics should be woven around the skills. Once children acquire understanding of a skill or concept, it can then be transferred to any historical area of knowledge. History learning structured around 'skills' provides the context on which pupils can structure new learning.

While in some subjects, for example, in Mathematics it is obvious that learning is often linear, that is, a child cannot do multiplication before the concept of addition is acquired, in history, learning does not occur in a simple step by step manner. This is in fact why I would be reluctant to create standards of achievement which are supposed to occur at certain ages as a child develops. A form of progression does occur in history, the older pupils' responses in this study were generally more sophisticated than those of the younger groups but complex thinking was sporadically occurring with all groups. This also seems to happen in science, where sometimes 6 and 7 year olds were observed performing at higher levels than older pupils (Black, 1992). Similarly Lee *et al.* (1996) have also observed that in history "some 7 year olds perform at a higher level than some 14 year olds on at least some of the tasks" (p.191).

This does not mean that a haphazard management of pedagogy is advisable but rather than creating steps of progression, the focus in history teaching should be on helping pupils to learn how to learn. From the experience gained while working on these projects the author would prefer an image of cognitive development in history, not as a sudden spark that triggers off an ability, but really as a process which may be compared metaphorically to a faded image that becomes sharper into focus the older the child gets. There is a specific role for the adult as well as for peers, and that is to make that already existing image come out brighter before.

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# Opinions of Prospective Turkish History Teachers on Globalization and History Teaching.

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*Abstract* - *The purpose of this study is to analyze the implications of globalization for Turkish education according to prospective history teachers. The fact that globalization is a fierce debate in our world, described as a "global village" today, paves the way for an analysis into the issue from the perspective of prospective history teachers. Thus, the literature on the issue has been reviewed and an attempt has been made to discuss the pros and cons of globalization for history teaching in Turkey. The study was based on a qualitative research design and conducted through focus group interviews with eleven students from the department of History Teaching, Faculty of Education, Marmara University. The study concludes that globalization especially enables recognition of different cultures, destroying certain prejudices which date from the past and catching up with worldwide advances as well as information sharing and academic studies. It enriches international educational activities and history teaching in particular. On the other hand, among crucial concerns of the participants about globalization are disintegration/degeneration of cultural values, Turkish language not being regarded as a scientific language, the brain drain, the infatuation with the West and globalization as serving powerful nations. In the light of the findings of the study, certain recommendations have been made, including courses on globalization in undergraduate and postgraduate programmes, accelerating the rate of foreign exchange programmes, upgrading the history curriculum in accordance with globalization and focusing on critical history teaching.*

*Keywords* - *Globalization, Turkey, university, history teaching, prospective teachers.*

## Introduction

Globalization is a concept which is influential in a great variety of areas such as goods, labour, capital, production, trade, communication, technology, culture, politics and education. It focuses on their worldwide interactions and became popular especially during 1980s. Globalization can be traced back to 400 years ago. However, as a concept, it was introduced in the 1960s and started to be used commonly in the 1980s (Lubber, 1998). For instance, globalization was not acknowledged as an important notion in academic circles until the mid1980s (Robertson, 1999). Furthermore, globalization has faced individuals with complex, local, national/international problems such as the clash of cultures and religions and protecting national independence within a global economy (Ersoy, 2007).

Globalization is the worldwide circulation of goods, capital, services, information and labour under a uniform regulation and a tendency to make the process increasingly instant (Geray, 1995). Skeptics maintain that inequalities within the world economy will lead to conflicts between different cultures and regions (Giddens, 2000). According to Berger and Huntington (2006), the most obvious means of expression of the emerging global culture is popular culture and this culture is being spread by a wide range of companies (e.g. Adidas, McDonalds).

From an educational point of view, globalization can be defined as schooling individuals in moving around and working in different world communities and even living in different environments. Within the framework of this definition, the objective of education is to train individuals not only to succeed within national boundaries but also to adapt themselves to, and succeed in different cultures and geographies (Oktay, 2001). A global individual experiences, learns and shares different individual sensities and internalizes global values by creating sound attributes out of it (Celik, 2001). Educational institutions are expected to modify their curriculum in order for globalization to develop educational outputs.

Owing to the transformation in ideological functions of education as a result of globalization, nation-state ideology has been replaced by free market ideology. The education in our global world has lost its function of a rough production of a closed-circuit nation-state ideology and undergone certain changes. Education possesses new ideological functions which produce various compositions that can be expressed through relativism, increased performance and technology, in a way that is required by free market ideology (Aktay, 2002).

With a high-level activity workforce, globalization has also resulted in a search for solutions in order to harmonize educational systems (Karlsen, 2002). As a matter of fact, educational planners of the 21st century have to take global factors into consideration for their designs. The reason for this is that the survival of societies in such a world depends on their openness to global competition and cooperation (Ozturk, 2001).

In order for universities to get integrated with the world, academic studies focus on how globalization affects the nature of globalization and institutions (Schneidman, 2005; Tural, 2004a; Tural, 2004b; Vidovich, 2002; Yang, 2002). In this context, the purpose of this study is to analyze the perspective of prospective Turkish history teachers on globalization and history teaching.

## Research Methodology

### Design/model of the research

The research was developed in a qualitative design. Qualitative research method, taking place in the natural environment, is a more convenient method to get more understanding and meaning from the experiences and to make healthier interpretations from them. In this research, phenomenonology pattern which is one of the appropriate qualitative research designs, is used. Phenomenology pattern is a research design creating the opportunity to review phenomena deeply, which we know in fact, but when explained as scientific findings results not in sharp rhetoric and creates rich discourse to interpret (Yaman, 2010).

Those who want to investigate social cases such as globalization can reveal the underlying states by using qualitative methods such as interviews and observations. Due to the nature of qualitative research, these research results cannot be generalized but it presents deep data related to globalization.

### Study group

This study was conducted on 11 students from the department of History Teaching, Ataturk Faculty of Education, Marmara University. 7 of the participants (73%) were male whereas the remaining 4 (27%) were female. The average age of the participants was 20. Included among qualitative research methods, a focus group interview was used.

### Data collection tool

The study also included a questionnaire in order to determine the opinions of prospective history teachers on globalization and history teaching. The interviews were recorded with an audio recorder. A structurally standardized open-ended interview was used. The type of interview conducted with the students was a "focus group". The focus group interview enables dialogues between individuals and a detailed analysis into the research problem.

Interview method is a data collection tool which provides us with information about why and what people think, their feelings, attitudes, experiences, wishes and it explains their perceptions and descriptions of reality and the factors related to their behaviours. It is also a method like a conversation and it supplies the deeper information about the people (May, 1996; Punch, 2005; Robson, 2001). In the research standardized open-ended interview (Patton, 1990) is used as the structure.

### Process

While writing the recorded data Mayring's (2000) descriptive record system is used. A content analysis approach is frequently used in the analysis of interview data and open-ended questions (such as, Bell, 1999; Robson, 2001). In our research categorical analysis of the content is used. First, the message is divided into units and then these units make a group which is previously identified (Tavşancıl & Aslan, 2001). In that way, codes create a full and meaningful group of independent parts (Miles & Huberman, 1994). Creating categories and their subcategories allows a researcher to re-examine the data (Ely, Anzul, Friedman, Garner & Steinmetz, 1998). The recordings of the interviews were transcribed and analyzed. Content analysis was employed in order to analyze the data obtained from the students. In addition to the literature, student opinions contributed to the process of obtaining codes and categories.

## Findings

### Definition of globalization

A common definition of globalization by the prospective history teachers participating in the study is "partnership and integration". For example, "Globalization is the dominance of one single language, nation, life-style and thought." [S1]. "It is a multi-faceted process that aims to produce a uniform individual model in cooperation with various disciplines in order to generate an international workforce market."[S2]. "It means a global village."[S4]. "It means that a Norwegian, a Turkish or an American will eat the same kind of food, listen to the same kind of music, catch up with the same kind of fashion, and will wear the same kind of clothes"[S2]. "It is the transformation of the world into a small village."[S6].

### Definition of globalization in education

The opinions of the prospective history teachers on educational globalization are as follows: "It is the state in which education is dominated by the dominant language and culture."[S1]. "It means that an Asian child will acquire the same information as a European child, and an attempt to generate a general education level."[S2]. "It means the opportunity for an English person to work in Japan, thanks to the training he/she has been provided with in his/her own country."[S3]. "It is the transfer of values commonly accepted by the world to students on the basis of international norms."[S4]. "It means developing a uniform student model."[S5].

### Positive effects of globalization

The opinions of the participants on the positive effects of globalization consist of general effects of globalization, educational effects and effects on history teaching in particular.

### The opportunity provided by globalization for familiarizing oneself with different cultures

The participants have focused on such positive effects of globalization as familiarizing oneself with different cultures, destroying prejudices and catching up with all the developments in the world thanks to information technologies: "It provides the opportunity to familiarize oneself with different cultures."[S6]. "For instance, today we can instantly be informed by an event in polar regions thanks to Internet technologies."[S8]. "Everyone can acquire anything any time he/she wants."[S1]. "I think it will contribute to our national development."[S7]. "Conditions force one to adapt himself/herself to globalization." [S2]. "It provides a universal perspective on things."[S6]. "It is crucial in establishing a bond with worldwide cultures; we can take the opportunity to familiarize ourselves with cultures against which we have held prejudices beforehand."[S6]. "It helps build a cultural bridge."[S7].

### Educational contributions

According to the participants, globalization contributes to the information explosion and sharing, academic studies and international educational activities: "I can say that educational benefits overweight the disadvantages." [S8]. "For illustration, academic studies can be conducted in a faster manner. In the past, the studies were limited; however, now we can follow worldwide studies closely and make comparisons." [S9]. The "Information explosion" increases in a very fast way in the world. We need to follow global opportunities closely so as to contribute to and benefit from the trend. [S5]. With globalization, the number of international symposia has increased." [S6]. "For instance, scientists with international knowledge share what they know through instructor exchange programs, which leads to educational richness and different perspectives." [S7]. "As long as you know how to search something on the Internet, you can conduct virtual research now that knowledge is published on the Internet, many institutions have enabled access to their archives, even newspapers dating from 1850s are available on the Internet and there are programs which translate sources in a language into Turkish." [S10]. "A research environment which used to be restricted to libraries has been replaced by the Internet by which we can reach anywhere in the world." [S11].

### Contributions to history teaching

The participants emphasize that globalization enriches history teaching: "The fact that we were trained in just Turkish history used to restrict us." [S1]. "Thanks to globalization, we have started to study European, Asian and even African history…" [S2]. "Soon courses on American history will be included, too."[S5]. "We take a course titled 'Introduction to the Middle East History' as it is one of the current issues in modern world. We used not to take such a lesson." [S1]. "New programs are superior to the former ones." [S5].

### Criticism of history curriculum

The participants criticized the history curriculum for being too strict, suffering from a lack of synthesis and evaluations of important issues, being restricted to stereotypical information, being deprived of critical thinking skills and providing a limited use of historical information: "I believe that the history curriculum for secondary education addresses just national feelings, that it is too strict and normative and that it has to be modified." [S6]. "…We are familiar with the Canakkale Victory just by its date - March 18; no synthesis, we won and it was over, that is all…"[S11]. "For instance, while we were studying the newspapers dating from the period of Menderes, we observed that there were no commemorative ceremonies regarding the Canakkale Victory; the curriculum should not be this way." [S4]. "No information contrary to national thought is presented."[S1]. "For example, the curriculum should not impose the feeling of hostility towards other nations on individuals." [S3]. "However, this should be mutual; other nations should not impose the feeling of hostility towards Turkey, too." [S10]. "We have learned detailed historical information about the Seljuk and Ottomans, but we have not gained a philosophical perspective on how to evaluate this information." [S2]. "We have not been provided with any training in where and how to access this information when we are appointed as teachers upon graduation." [S11]. "Global hunger should be fed with thought." [S1]. "We want to learn how to swim but always stand on beach. In this way, it becomes impossible for us to swim. History is the same." [S8].

### Expectations of history curriculum

The participants emphasize that a history curriculum should be developed in a way that will focus on a type of content based on research and questioning, universal issues, world history, detailed information about national issues, an association between historical issues and current events and the use of materials other than books: "I do not remember being asked during my educational life to conduct a research study based on a comparison between historical events. The programme should include a kind of education based on comparison." [S4]. "The new curriculum should cover such courses as Russian history." [S7]. "More focus can be provided on courses on world history." [S3]. "We have the Canakkale Victory which is envied by the whole world. Even so, it has not even been filmed in a proper manner. [S10]. "For instance, as history graduates, we need to have much more information about the Armenian issue." [S6]. "There is a need for a program that can make use of technology, not just books, and carry out general reviews worldwide." [S8].

"The curriculum should include such courses as Roma history, European history and world history that are universal and will be useful in an international sense." [S2]. "Current issues should be incorporated into curriculum. For instance, there should be a focus on establishing on association between the Ottoman's policy on tolerance and current universal issues." [S4]. The program should encourage students to research and a perspective should be developed in order to school the kind of individuals that can reason." [S7]. "They should be made to question what purpose history should serve." [S1]. Within the program, Turkish and world history should be organized with reference to the particular conditions and environmental circumstances of that time."[S9]. "The program should encourage one to research a historical phenomenon in domestic and foreign sources."[S4].

### The mission of a history educator

The participants point out that educators should carry out the kind of education that will make students question historical events and phenomena, that will not be detached from the past, that will develop national feelings, that will enable students to make historical self-criticism, that will destroy the inferiority complex and that will be suitable for functional history teaching: "The students should be made to fictionalize important historical events with special reference to causation."[S8]. "A universal historical awareness should be developed." [S3]. "The educational program should not be detached from historical heritage just to be Western or global."[S11]. "I believe that history teachers should act as dividers. The pointed piece of metal in dividers is history teaching. Once a student has been provided with a historical awareness, he/she will not undergo a cultural deformation whenever he/she goes in the world." [S7]. "Love for country and nation should be instilled into students."[S9]. "When we discuss something, we act through emotions and try to make the opposing party accept our own opinion. First of all, we should learn to accept what is known." [S1]. "When we talk about the places we have conquered, we define them as "conquests"; however, we describe it as an invasion when others take a piece of land." [S6]. "For example, prior to the invasion of Iraq, America based the invasion on an unreal purpose, namely to bring democracy there." [S11]. "The students should be taught how to look at things in a multidimensional manner."[S5]. "The young should not be overwhelmed by different languages, religions or cultures and should steer clear of the inferiority complex."[S4]. "Our students should be able to think in a multidimensional way. They should not interpret events or phenomena as the following: 'It is true if it has been carried out by my own country'."[S4]. "During secondary education, history teachers are constantly faced with a question: 'Sir, history is a thing of past, is not it? What purpose does it serve?'. A history teacher should be qualified enough to resolve this question."[S5].

### Expectations of higher education

The participants expect higher education academics and instructors to increase the number of student exchange programmes, to be objective and not to exclude different viewpoints. "Student exchange programmes in higher education can be adopted for historians, too. This should be not only at an undergraduate level but also for shorter periods. For instance, Greek and Turkish students should be provided with the opportunity to establish a dialogue between them." [S11]. "Teachers/instructors should be objective. For instance, it may be difficult for you to pass the exam in the event that you sometimes write something against the teacher's opinion." [S6]. "Most of the students are obliged to write things which are consistent with an instructor's viewpoint and can pass only by doing so."[S8]. "Student opinions should be respected; students with different cultural backgrounds can provide enrichment."[S10]. Once, while the Battle of Gallipoli and invasion of Izmir were being explained, a presentation was made from two opposing points of view. It was very lasting and informative. Instructors should carry out such activities."[S2].

### Concerns about globalization

Among the concerns of the participants about the adverse effects of globalization are cultural disintegration and degeneration, Turkish Language not being regarded as a scientific language, brain drain and increased infatuation with the West.

### Devaluation - cultural disintegration

A common concern among the participants is that globalization results in cultural disintegration, degeneration and devaluation. "Cultural disintegration occurs one after another." [S3]. "Turkish values and traditions are under threat." [S11]. "I have a concern that it will lead to a breakdown especially in moral values." [S1]. "In Western society, familial values are not strong, which might have an adverse impact." [S7]. "When a comparison is made between 1980s and 2000s for our own country, a kind of disintegration can clearly be observed. This means that globalization accelerates the rate of breakdown in familial values."[S2]. "I think it will have negative influences on national feelings and traditions." [S3]. "Our national feelings will be spoilt once we have been admitted into European Union."[S5]. "Different nations will be completely ignored the moment the world has been transformed into a small village." [S9]. "We are told to be Western; all the same, we have managed to be neither Western nor Eastern; we are stuck between a rock and a hard place." [S2]. "Today our traditions and historical heroes are attacked under the disguise of globalization. For example, there are people who call Turks barbarian." [S9].

### Turkish language not being regarded as a scientific language

Some of the participants emphasize that the Turkish language is not regarded as a scientific language and that the English language is a universal one. For example, "Today the English language is the dominant language. Recent advances in Turkish language might enable it to appear as a dominant language." [S1]. "It causes Turkish language not to be regarded as a scientific language."[S1].

"You have to speak English even when you are going to Africa."[S7]. "For instance, you will be faced with the obligation to learn English if you are intending to receive a postgraduate education. This means a weakening on the part of Turkish language." [S6].

### Brain drain

Some of the participants believe that globalization leads to brain drain. For example, "Globalization paves the way for brain drain." [S8]. "Global mindset wants the cleverest people in the world to work for it. Then, when these people taste the level of convenience there, they do not want to return to their home country." [S8]. "The dominant philosophy is that 'your home town is not where you were born but where you are fed', which causes some people to feel that 'I am an American'."

### Infatuation with the West

The participants who think that globalization increases the level of infatuation with the West have expressed their opinions as follows: "I believe that the most negative effect of globalization is that it results in infatuation with the West." [S1]. Through exaltation of the West for many years now, our society suffers from a feeling of pressure and inferiority."[S3]. "The young see themselves as inferior because of being trained to admire the West." [S7]. "There is an attempt to show Europe as free from problems. We, on the other hand, advertise ourselves in a bad way." [S11].

### Global benefits

Some of the participants hold that globalization serves the interests of powerful nations. For example, "Global brands present a fashion within a country; for instance, new generations eat at McDonalds. Globalization and capital serve for powerful nations."[S2]. "The greatest benefit of globalization is that it makes certain nations rich in an economic and cultural sense." [S3]. "It is advertisement that is in the foreground. You may not be able to spread over the world despite producing high-quality products as long as you cannot advertise yourselves in a good manner." [S11]. "For example, an acquaintance of mine has bought a very beautiful scarf abroad. Its label says Turkey." [S10]. "The brand... is a Turkish one but many of those who buy it think it is a European one." [S7]. "I believe that globalization is organized by giant companies that finance developed nations." [S11]. "Globalization is spread by companies that want to sell goods all around the world." [S7]. "When it comes to globalization, the first thing that comes to my mind is EU. EU is about to turn into one single nation." [S1].

It can be argued that globalization has positive effects in general, on education and especially history teaching. According to the participants, globalization especially enables recognition of different cultures, destroying certain prejudices which date from the past and catching up with worldwide advances as well as information sharing and academic studies; and enriches international educational activities and history teaching in particular. These findings are in parallel with those of Yaman (2005) and Senturk (2007).

The participants criticized the history curriculum for being too strict; being full of certain stereotypical information; being based on memorizing; being far away from syntheses and evaluation; not developing critical thinking skills; and providing a limited use of historical information. They also expect history teaching to be focused on content based on research, reasoning and comparisons; on universal issues; on world history; on detailed information about national issues; on an association with current events; and think that problems such as not using multiple materials should be overcome. As a matter of fact, the findings of the present study are supported by those of other studies (Amoore & Langley, 2001; Bates, 2002; Haige, 2002; Lee, 2002; McBurnie, 2002; Selinger, 2004; Tural, 2002; Yang, 2002) which state that, thanks to globalization, teaching programmes, methods and techniques are diversified; perception of a multi-cultural and multi-disciplinary program is developed; and that instructor-centered teaching is replaced by research-centered, active and project-based learning. Furthermore, the participants expect history educators to carry out an educational process which aims to school the type of individuals who will question historical events and phenomena in a multidimensional manner; who will criticize themselves; who will attach importance to national values; who will be far away from the inferiority complex; and who will have an awareness of functional history. Moreover, instructors are requested to be objective and not to exclude different perspectives whereas higher education institutions are expected to raise the number of student exchange programmes. Also, in the findings of Senturk's study (2007), the effects of globalization on the Faculties of Education in administrational level have been associated with improving academic standards and putting international standards into practice. On the other hand, among crucial concerns of the participants about globalization are disintegration/degeneration of cultural values, Turkish language not being regarded as a scientific language, brain drain, infatuation with the West and globalization serving for powerful nations. These findings support the statements made by Yaman (2005). In addition, Moore (2003) emphasizes that globalization poses a threat to local cultures, that popular culture is being Americanized, and that values, arts, literature and music have gone through the floor. Kizilcelik (2001) describes globalization as another version of capitalism while Durmus (2002) point out that globalization is a multi-faceted siege and any person related to education should make efforts to observe and overcome the problem. Consequently, one should keep in mind that allied or opposing approaches to globalization, which are inspired by the political approaches that regard the processes as good/bad or right/wrong, might be misleading and that an attempt should be made in order to think of ways to benefit from globalization in a world which is increasingly heading for globalization (Yaman, 2005).

With regard to the continuity of the investigation, the study pointed out some main possibilities:

- Undergraduate and postgraduate programs in universities should include courses on globalization.
- Undergraduate and postgraduate programs should accelerate the rate of student exchange programmes and increase the number of exchange students. This might provide an opportunity to familiarize oneself with different countries and cultures and to destroy prejudices.
- Within the framework of globalization, it has been observed that universal expectations of secondary, undergraduate and postgraduate education have risen, that especially the history curriculum, teachers/instructors and universities should be improved so as to satisfy such needs and expectations.
- Specific changes should be carried out in order to introduce critical history teaching in which comparative studies that will upgrade the curriculum are conducted and different viewpoints are questioned.

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# Policies on History Education: Constructing National Identity During Early Republican Period

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*Abstract - Throughout the 20th century, history has been studied for a variety of purposes. These include the study of history 'for its own sake' which consists of developing various academic, especially historical skills; as a means of social control, to introduce children to their heritage, to promote moral virtue, to inculcate civic pride and patriotism, to foster a love of peace and universal understanding. Extensive research reveals that prevailing paradigms of certain periods are reflected in the educational policies and thus, the mission attributed to history education is largely dominated by the conditions of the periods. More specifically, history education was seen as a tool of constructing national identity, therefore utilized for instilling nationalistic and patriotic values during late 19th and early 20th centuries.*

*The basic aim of this study is to show how the process of nation-building has affected nationalist historiography and the perceptions of academics and educators on history education during Single Party Period of Turkish Republic. This research aims to examine how new born Republican ideology was imposed on the new generation through history education during Ataturk Era. How the ideology of the state was reflected in educational field, what kind of a citizen was aimed to be formed by the state and how the history textbooks served to these aims were the main questions to be answered. In line with this main purpose, understanding of history among the ruling elite and how history was utilized as a tool in constructing national identity/citizenship were displayed. In this respect, First and Second Turkish History Congresses were examined as the main meetings where official history was produced and introduced in the name of Turkish History Thesis. Moreover, history textbooks of early Republican period were analyzed as the crucial instruments of transferring nationalistic ideology and constructing the new understanding of history in the new generation.*

*Keywords - Anatolia, Christianity, Ethnicity, Historiography, History Education, History textbooks, Ideology, Identity, Islam, Ataturk, Nation state, Nationalism, Republicanism, Textbooks, Turkey, Turkish history thesis.*

## History as the Formation of a Collective Identity

Before analyzing nationalist historiography and its reflections on history education, we first need to clarify the relationship between nationalism and history as a discipline. As is known, the idea of nationalism and emergence of nation-states are based on the modernity project of the Enlightenment in the 18th century. Sources on nationalism have focused on, and scholars have stressed the importance of the analysis of the process of "imagining" or constructing national identity within the nation-states (Anderson, 1991). The modern nation-state and society needs a collective memory, thus history will construct this memory and a national identity among its population. Nation-states attempt to legitimize themselves by basing their discourse on having deep roots within the past and historical continuity throughout the time. Although nation-states were emerged within a specific period of history, they also make a connection with the ancient communities which lived in the same territory (Tekeli, 1997).

Most of the scholars accept that history has an important role for the creation of collective memory and especially history writing[1] in universities was an effective way in the nation-building process. The beginning of the 20th century was the period when political history dominated the field. In historiography, the focus was rather on power-politics, diplomacy, decision-making and great men. There was an emphasis on nationalistic history and preservation of the status-quo before and during the First World War. Traditional historiography was closely connected with nationalism and process of nation-building across Europe starting from the late 18th century. Professional history writing in universities had close links with the task of nation-building in the 19th century. In other words, historians had great role in making of the nation within the state[2]. Hence, academic texts had a great influence on changes in society and culture, and constructing historical consciousness on the new generation. The origins of this understanding were formulated in German universities and were evolved in other Western European countries in the late 19th century. This era also witnessed the rise of 'professional historiography' which strictly differentiated itself from amateurs and literary discourse.

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1. Actually, writing of academic texts was, only one way that historical consciousness was constructed and expressed. Celebrating of national days of remembrance and festivals across Europe, or institutionalization of national holidays, monuments and symbols were also influential in constructing historical understanding in nationalist perspective with the help of increasing influence of the mass media.

2. For further information about politicisation of historiography and how Italian, French, German and British historians contributed to and influenced the nation-building processes in the 19th and 20th centuries, see *Writing National Histories*, eds. Stefan Berger; Mark Donovan; Kevin Passmore, (London: Routledge, 1999)

Also well-known as Rankean paradigm[3] and highly influenced by positivism, such history writing can be briefly described as being value free - 'scientific' as relying upon archival materials which aimed at objective knowledge. The historians following Ranke's approach perceived the past and believed to reconstruct it 'as it had actually occurred' and narrowed themselves only on political life of the nations.

Another characteristic of those mainstream historians in European countries was their clear stance and participating actively in political arena. In Germany, most of the historians were asserting that a historian should be partisan and also his/her political views would have no effect on his/her scholarliness and objectivity[4]. Therefore, it was nearly impossible to write history isolated from contemporary politics. Iggers (1999, p.19) explains this contradiction in terms of the theological presuppositions which guided mainstream historians' historical and historiographical thought. Divine will, in Ranke's words 'the finger of God', gave history direction and meaning. As Ranke explained, a historical approach to politics and history makes it possible to understand the objective forces which operate in the world. Thus the new scientific school was, from the start, politically oriented and propagandistic.

It can also easily be seen in dominant national discourse that all national histories aimed to demonstrate the uniqueness and superiority of their own nation-state which would have great reflections on school history. As in the case of Britain, Whig historians declared the unique tradition of liberal parliamentarism was the reason of Britain's being superior to the other nations. A famous British historian, George Macaulay was declaring that British were "the greatest and most highly civilized people that ever the world saw"[5]. There were also negative perceptions about other nations inside Britain; therefore the Scottish, Irish and Welsh were marginalized and the term 'England' was used as the synonym of 'Britain' for a long time[6].

This understanding of history among historians as seeing their own country unique and superior to other countries can be evaluated in terms of the period's political atmosphere. As in the case of Britain, it can be said that, in the late 19th and early 20th centuries, construction of the "Britishness" in the new generation was closely related with Britain as being an imperial and post imperial power (Marks, 1990). Thus, during late 19th century, in the "age of imperialism", patriotism became ideological apparatus of the Empire. It was *royalist* and *racialist* and was identified with conservatism and militarism[7]. One of the main aims was to disseminate English culture all over the empire which included customs, traditions and codes forming English identity having existed since early modern period and this provided the basis for the development of British nation during 18th and 19th centuries.

As from 1914, similarly, German intellectuals, including Ernst Troeltsch and Friedrich Meinecke attempted to define a specific German ideology, distinct from and superior to that of the West. In the literature a whole set of stereotypes were used to distinguish a superior German world from an inferior undifferentiated Western one. German *Kultur* was contrasted with Western *Zivilisation*, the depth of German *Bildung* with the superficiality of Western culture (Iggers, 1999).

In both France and the United States, from the late 19th until well into the 20th century, two different national identities coexisted. For one the nation was built upon common political institutions and attitudes essentially republican if not always democratic in nature with origins in a successful revolution against arbitrary authority. The other defined the nation in ethnic or even racial terms, as Gallic in France or Nordic and Protestant in the United States. But the republican and democratic traditions, particularly in France, also placed a high value on the military and glorified expansion. Side by side with the republican tradition there existed throughout the 19th century, and until 1945, a xenophobic, anti-Semitic orientation which, as Maurice Barres's novel *Les Deracines* demonstrates (Iggers, 1999).

After 1919, national tradition in historiography declined by degrees and gave place to internationalist perspective. Political historiography central to the formation of national and social identity in the 19th century started to lose its effect in public life (Iggers, 2005) and there emerged a consensus that history must not only narrate, but also analyze. During the inter-war period there was a rise in social and economic history, but would be more vigorous after 1945 (Berghahn & Schissler, 1987). Annales School, developed by French historians was an important approach against traditional historiography and focused on writing problem-oriented analytical history through an inter-disciplinary understanding. However this shift in historiography would be reflected in the educational field slowly over a long period and history education would serve rather imperialist, nationalist and patriotic aims until the end of Second World War.

The success of nationalist ideology is mostly related with the education system. Nationalist culture is shaped and constructed in schools and new generations will be inculcated there in line with nationalistic perspective. Thus, nationalism, from its emergence until today, has been the means of providing the development of state-controlled educational systems and schools functioned as formation of national system in many countries (Gutek, 2005).

In this context, history education had a special place in constructing national identity among peoples. Hence, governments have at various times become interested in and attempted to control history education in schools. Berghahn & Schissler (1987) show that school history has been used at various times in Europe as a tool of state socialization, geared to the teaching of the national past in order to generate identification with the nation and the state. Therefore, history subjects have been one of the most controversial issues of the school curricula. The opportunity to discuss and understand the formation of identity and possibly control it made history an essential and controversial part of any curriculum (Baldwin, 1996). Debate on history education both among politicians and educationists was rather upon the methods of teaching history - *how to teach it* - and more importantly, about the selection of and justification for history - *what history to teach and why* (Phillips, 1998).

## Identity of the New Nation/Republican Ideology and its Educational Policy

As previously stated, historiography of a nation-state and its policies on history education is closely related with the modernization period of that state. Hence, in order to understand how Turkish Republic utilized history as a tool in constructing a national identity, an overview of Republican ideology and its basic principles will be discussed.

The core values of the Turkish Republic can be described as Kemalist modernization project and the worldview the outline which is determined and held by the ruling cadre under the leadership of Mustafa Kemal Atatürk, and is attempted to be systematized in 1930s with the effect of internal and international factors. The modernization project of the Republic was to transform the state and society from empire to a nation-state and this process was held through the construction of modern social and political institutions. Therefore, modernization and nation-building in Turkey were complementary processes as different from its Western counterparts.

One of the basic questions of Republican ruling cadre was identity problem. The question of "who is a Turk?" could not be solved during foundation process and continued until 1930s. Therefore, Turkish identity is constructed as an eclectic combination of French territorial model and German ethnic-culturalist nationalism. In this respect, while the official discourse was based on citizenship and territorial belonging, stated in 1924 Constitution as "People of Turkey due to citizenship irrespective of religion and race is rendered as Turk"; the speeches of ruling cadre clearly express their ethnic, even sometimes racist understanding[8] of nationalism which was fed from historicist-culturist-ethnicist understanding of middle and eastern European romantic nationalist movement. Kemalist perception of nation can be best observed in the book named Civil Knowledge (*Vatandaş için Medeni Bilgiler*, 1998) which was written by A. Afet İnan with the instructions and personal dictations of Atatürk in 1930 with the awareness that the society was completely alien to the Republican values. The book was also titled as Civics (*Yurt Bilgisi*) and was taught as a textbook in secondary schools. In this book, the nation is described as "People of Turkey who established Turkish Republic is called as Turkish nation." (p.16). On the other hand, the list of the factors which gather Turkish nation include 'unity in race and origin' as well as unity in political existence, language, homeland and also historical and ethical affinity. (p.23 - 24).

Atatürk targeted to rise the Turkish Republic to the "level of contemporary civilizations". The plan was to change/transform not only the state, but the whole society in order to "progress". Modernization through westernization was the core of Kemalism and in this context positivism was the basic characteristic of this modernization project (Timur, 1993). Belief in the superiority of reason and positive science instead of religious-metaphysic thought and emphasis on temporality was very important in this approach. Therefore the reforms aimed to limit the sphere of religion within individual life.

As a matter of fact, positivist approach and the emphasis on mind was the product of Enlightenment. In this respect, Enlightenment set forth a homogenous world that each society would unite under the universal ideas of freedom and equality no matter had they different ideas, traditions and forms of life. Enlightened Republican cadre also aimed to reconstruct the society in a scientific and objectivist manner and transform different forms having diverse values into a united citizen.

While the main target of the ruling elite was to create a new nation-state and to reconstruct the society with a secular basis; temporal and religious powers in the Ottoman Empire, the Sultanate and Caliphate were abolished and the Republican regime was established. Moreover, all the reforms such as alphabet and language reform, adoption of new civil code, clothing reform can be regarded as a breakaway from old religious-traditional culture and this discourse provided legitimacy for these reforms.

3. Because it was Ranke who aimed to turn history into a science practiced by professionally educated historians and rejected history writing on the basis of other than primary sources. Georg. G. Iggers, *Historiography in the Twentieth Century: From Scientific Objectivity to the Postmodern Challenge*, (Middletown: Wesleyan University Press, 2005), 24 - 25

4. Historians such as Dahlmann, Gervinus, Droysen, Sybel, Baumgarten, Treitschke, Mommsen, Ranke in Germany and also Guizot, de Tocqueville and Thiers in France not only espoused political positions in their writings, but occupied powerful political posts. See Georg G. Iggers, (1999) "Nationalism and Historiography, 1789 - 1996: The German Example of Historical Perspective" (eds.) Stefan Berger, Mark Donovan, Kevin Passmore, *Writing National Histories*, London: Routledge, p.17 - 18

5. For nationalist discourse of European and US academic historians see Paul M. Kennedy, "The Decline of Nationalistic History in the West, 1900 - 1970", *Journal of Contemporary History*, 8 (1) (1973)

6. For further information about Englishness/Britishness question, see Rebecca Langlands, "Britishness or Englishness? The historical problem of national identity in Britain", *Nations and Nationalism*, 5 (1), (1999): 59 - 60

7. Hugh Cunningham, "The Language of Patriotism, 1750 - 1914", *History Workshop Journal*, 12 (1981): 23 - 4

8. This perspective can be best seen in radical wing of RPP such as Mahmut Esat Bozkurt and Recep Peker. For instance, in his speech in 1930, Minister of Justice, Mahmut Esat (Bozkurt) said that: "It is my opinion that, this country is Turkish. The ones who are not authentic Turk have only right to be a servant or a slave."

As is seen, early Republican period was not a process in which a clear, coherent revolutionary ideology was formulated from the beginning and imposed onto the new generation through various tools. Kemalism was a gradual process of flexible and pragmatic actions which changed throughout different circumstances in the 1920s and 1930s.

1930s were critical years in integration of the state and Republican People's Party (*Cumhuriyet Halk Partisi*). Relatively liberal character of the regime started to disappear as from 1930s and the state became more authoritarian disallowing any kind of opposing views. Internal and external developments were critical in changing of the character of the RPP policies. In international arena, inter-war period witnessed the rising of authoritarian regimes as the consequences of First World War. Except some places such as the Scandinavian countries, Switzerland and United Kingdom, parliamentary regimes were ended nearly all over the Europe. Besides, 1929 Depression encouraged the governments to carry on militant propaganda against liberalism and a liberal economy. The lack of confidence in liberalism, individualism and democracy resulted in increasing of anti-liberal, etatist and even fascist solutions.

Republican regime has crystalized in this period, thus social and political characteristics of the period was very distinctive in disourses and practices of ruling cadre. For instance, in the Republican History Lectures (*İnkılap Tarihi Ders Notları*, 1997) which was used as textbooks in universities, Recep Peker strongly attacts both socialism and comunism, also to capitalist ecomonic system and liberal democratic regimes. He asserts that multi party sistem would carry the country to depression, weaken the state structure and cause general instability.

In internal affairs, unsuccessful results of Free Party (*Serbest Fırka*) experience and especially Menemen Incident led the RPP cadre realize that the new regime was not fully established. In this period, in order to maintain coherence and unity within the society, RPP started to reject alternative value systems stressing differences. The ruling cadre frequently emphasized that the party was representing the benefits of the whole society, hence there was no need to perform benefits excluding RPP. Atatürk declared in *Vatandaş için Medeni Bilgiler* (1998, p.236) that; "Aim of making opposition, criticizing cannot be the essentials of establishing a party. We have understood and practiced the concept of opposition party wrongly. Establishing a party does not only mean to follow opposing ways to the existing party or parties. People who are acting like this are the ones who are negative and retaining progression. These are like people who use disparaging others by only means to sell themselves."

Under those conditions, in 1927 congress, RPP took the control over all of the accociations. Furthermore, after 1931, it closed down most of the associations such as Turkish Hearths (*Türk Ocakları*), mason lodges and Teacher Unions (*Muallim Birlikleri*). In this context, Kemalist regime established different institutions to spread the Republican ideology through the society. People's Houses (*Halkevleri*), Nation Schools (*Millet Mektepleri*), Turkish Historical Association (*Türk Tarih Kurumu*) and Turkish Linguistic Association (*Türk Dil Kurumu*) controlled by the state, served as ideological tools. Especially Turkish Historical and Linguistic Associations were two important institutions which used history and language as significant tools in creating a national identity and an official history during the 1930s. These developments led to the formulations of the Turkish History Thesis (*Türk Tarih Tezi*) as the official history of the Republic and Sun Language Theory (*Güneş Dil Teorisi*) which will be discussed in the following pages. Educational project of the new regime was not limited to formal schools; it was used as a widespread socialization instrument (İnal, 2004). However, since mass education is not in the scope of our study, we will focus on formal education system, and specifically history education.

## Formulation of Official History in the 1930s

One of the critical outcomes of Republican modernization process was the official historiography. The discourse of this project was founded on a discourse of radical distinction between past and present and was presented as a clear cut off from the Ottoman past - *Dark Age* (Şeker, 2007).

In this context, Kemalist modernization focused on to demolish the old system and to construct a new order with a radical rupture; hence it was implemented in a revolutionary understanding. Accordingly, 'the new Turkey has no relation with Ottoman past' and 'the Ottoman government has passed into history and now a new Turkey has been born' were the characteristics of Kemalist discourse. The album which Ministry of Education prepared on the occasion of the Republic's 10 Year Anniversary entitled From the Ottoman Empire to the Republic of Turkey. How Was It? How Has It Become? (*Osmanlı İmparatorluğu'ndan Türkiye Cumhuriyeti'ne. Nasıldı? Nasıl Oldu?*, 1933) is a good illustrator of the new regime's perception of the past. In the album, the past and present are shown on facing pages in complete opposition; with the heading on all the left pages "How it was" symbolized by spider webs, and on the right pages "How it has become" symbolized by the torch of knowledge.

On the first two pages of the album, sultanate and Republican regimes are compared. On the first page, there are some general statements about Ottoman sultans such as 'sultans were the prodigals of cruelty and debauchery who were corrupted inside the palaces'.

Besides, there are photos of two of the last sultans of the Ottoman Empire with the following descriptions; "Yıldız Owl who chokes awakened youth and corrupts them in prisons: Abdülhamit" and "Sevr broker who sold his country to save his throne: Vahidettin" (1933, p. 2). Conversely, on the next page, Atatürk is glorified as the top hero of the nation and described under his photos as; "Ghazi and his friends always knew to hold their heads high and look to the future during the Independence War" (1933, p. 3).

As stated previously, this period was the consolidation of the regime through determining and defining Republican ideology with the effect of internal and external socio-economic and political developments. One dimension of spreading republican ideology among masses was to establish a new history for the new Republic. Atatürk was aware of the fact that one of the basic components of nation-states was common history. Thus, he put high emphasis on searching of Turkish history. Consequently, he established Turkish History Survey Committee (*Türk Tarih Tetkik Cemiyeti*) in 1931 to make scientific researches about Turkish history. His basic aims concerning this issue were to provide history textbooks in line with Turkish History Thesis and then to organize a congress to strengthen and legitimize the thesis among scholars and teachers. Correspondingly, history textbooks were written for secondary and high schools in 1932 and afterwards two congresses were arranged in 1932 and 1937 which were so significant in showing how Turkish History Thesis was grounded and defended by some scholars and also the debates among participants.

The new state was aware of the importance of history as a discipline in adopting the principles of the revolution on masses, thus, from the early Republican period until today, primary and secondary grade textbooks, including history books have always been under the assessment and direction of the state. Swartz (1997) asserts that the content of the secondary grade Turkish history textbooks not only represents how the state portrayed national values at the time, but they are also powerful cultural and political artifacts illustrating changing interpretations of what it is to be a Turk.

Beginning from 1924, the issue of bringing history education to comply the state with the aims of the Republic and making it more efficient, has been discussed within the framework of national education studies. During the first years of the Republic, history textbooks of the previous period were taught with some minor changes. Although these books, which were mainly based on French course books were moderated to a certain extent by the Turkish historians, they were in contrast with the Turkish History Thesis to be put forth during the 1930s. In other words, when examined, these books were seen to be highlighting Turkic nomadic life patterns, irrespective of glorifying the Turks[9]. It is quite often to come across with many examples reflecting such situations in the book History of Turkey (*Türkiye Tarihi*) written by Ahmed Hamid and Mustafa Muhsin, and in General History (*Umumi Tarih*) written by Ali Reşad which were taught in secondary schools.

In 1928, Atatürk displayed close concern for Turkish history and history teaching especially at secondary grade. He directly gave the duty of researching and writing Turkish history to Afet İnan[10] after she has shown him that it was written in one of the French geography textbooks that Turks belonged to yellow race which was actually secondary type of human being (İnan, 1939, p.244); and as quoted below, has expressed the necessity that history should be researched and written again through an objective point of view, instead of the views of foreign authors, who for various reasons, are no friends of Turks:

> The view which introduced Turks as an underdeveloped nation to the world was also adopted by us. At the age of empire, Turks also accepted the perspective that the empire and the nation had emerged from a nomadic tribe of 400 tents. First of all, we should teach our people their own history; that they belong to a noble nation and are the children of a nation which is the mother of all civilizations... (Başar, 1945, p. 122)

Fuat Köprülü, in the First Turkish History Congress, stresses the necessity of writing a national history through gathering every items of the national past and considers 'recreation of our national history' as the spiritual liberty of the nation (1932, p. 47). Similarly, Akçura states the main problem which Turkish History Survey Committee (*Türk Tarihini Tetkik Cemiyeti*) faces as to give the place Turkish nation deserves among the world's nations, and to reveal the big role Turks have played within history of humanity but the enemies have tried to hide (1932, p. 597). Therefore, the main question is to search and find out the place of Turks in the world history and their contributions to civilizations.

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9.  For detailed knowledge about the mentioned textbooks, see Nevzat Köken, *Cumhuriyet Dönemi Tarih Anlayışları ve Tarih Eğitimi (1923 - 1960)*, Unpublished Doctoral Thesis, Isparta 2002

10. Afet İnan wrote a dissertation entitled "Anthropological Characteristics of Turkey's People and History of Turkey" under supervision of Eugene Pittard, Swiss anthropologist. She even conducted researches of "determining the skull of Turkish race" with the order of Atatürk during early 1930s. In line with those studies, graves were opened and skulls were measured in different parts of Turkey.

As a result of the studies made by the Turkish History Committee (*Türk Tarih Heyeti*) formed upon the directives of Atatürk during the 6th Assembly of the Turkish Hearths in 1930, a history book of four volumes named An Outline of Turkish History (*Türk Tarihinin Ana Hatları*) was written for schools. Afet İnan, Akçuraoğlu Yusuf, Ağaoğlu Ahmet, Reşit Galip, Hasan Cemil Çambel, Sadri Maksudi, Reşit Tankut, Şevket Aziz Kansu and Köprülüzade Fuat were some of the contributors of this book and accordingly Kemalist historiography. Focusing basically on the outspread of the Turkish race through historic and prehistoric periods, this book was the first attempt to convey the official history, that is to say the *Turkish History Thesis* for schools (Ersanlı, 1996).

## Turkish History Thesis

The Thesis was actually a reaction against European perceptions of the Turks as an inferior people. It first attacked the idea that Turks were incapable of creating a civilization by asserting that, on the contrary, the very first human civilization was the achievement of these people in Central Asia who were all Turkic and belong to the "white race", not the "yellow race". All civilizations of the world had been derived from this proto-civilization due to outward migrations from this area. Secondly, the thesis aimed to show that Turkish history was not limited to an Ottoman-Islamic past; it stressed pre-Ottoman/Islamic identity and emphasized the existence of the Turks since ancient times. Thirdly, the Thesis argued for a continuous Turkish presence in Anatolia since the Bronze Age and perceived this geography as the homeland of the Turks (Zorlu Durukan, 2006; Ersanlı, 2001).

Historical understanding of the revolutionist cadre was a reply to Islamic-Ottoman history (Avcıoğlu, 1984, p.19) in a sense, so it was understandable to break the ties with the Ottoman past both as socio- politically and historiographically. The new nation needed a new history and it was indispensable to reject the "unsuccessful Ottoman past". In connection with cutting the relations with the Ottoman past historiographically, Turkish History Thesis aimed to find out the connections with pre-Islamic era and especially ancient Anatolian and Near East civilizations. Whilst Atatürk gave the task of doing research about historical origins of Turks to Afet İnan (1939), he told her that Turks could not emerge an empire in Anatolia from a tribe, as claimed by Europeans. The mission of Turkish researchers should have been to investigate cultural richness of Turks. Atatürk wanted to find out the autochthonous peoples of Turkey. As the first civilization of Anatolia was Hittites, he sought their relations with Turks.

The focus was on Anatolia as a territory. Nonetheless, it was already known that there were many immigrations to Anatolia within different time periods, thus it was essential to complete the immigration chain and connect it with Turks. This led the historiography base upon Central Asia as the very beginning history of Turks as the founders of all civilizations. In other words, official historiography combined Central Asia as historical roots and Anatolia as geographical/territorial roots of Turkey. As Atatürk states:

*Turks cannot be the real owners of Turkey if they immigrated here recently. Turkish brachycephalic race is the first nation that established a state in Anatolia. The cultural fatherland of this race was Central Asia at ancient times where the climate was suitable. Throughout time, the climate has changed… This people were forced to immigrate. From Central Asia, they spread to east and south, north and south of the Caspian Sea. They settled to those places and founded their cultures there. In some areas, they became autochthonous and at some other, they were mixed with other autochthonous races.* **(İnan, 1939, p.245 - 6)**

Another reason of attempting to prove that Turks were the autochthonous of Anatolia was a reaction to the claims of imperial powers in that territory during the Independence War. After the First World War; some European states such as Greece, France and Italia demanded certain areas of Anatolia claiming that they have the right to occupy those lands. Turkish Independence War had occurred against those invaders and Atatürk started to organize historical studies to remove the effects of negative propaganda towards history (Akurgal, 1956; Karal, 1977). Hence, the Thesis was used as a tool to legitimize Turkish rule through building an ethnical contact with ancient people in Anatolia and a historical continuity throughout time with the understanding of "Turkish history is a continuous factual the source of which is buried into the darkness of the past and which constantly flows for a long long time" (Belleten, 1944, p. 6).

The first initiative of official historiography can be regarded as Pontus Question (*Pontus Meselesi*, 1995) which was published by *Matbuat Müdüriye-i Umumiye* in 1922. Tunçay (1981, p. 300) exemplifies this book as the precursor of Turkish History Thesis which will be formulated 10 years later. Actually the book was written to confute the thesis that Greeks and Armenians were the autochthonous of Anatolia and aims to "prove the legitimacy of the Turk thesis during Lozan negotiations" (1995, p. ix). However, many claims of Turkish History Thesis can be seen in that book. Introduction of the book starts with the claim of "First of all, world's public opinion should know that Anatolian land is Turkish from the beginning till the end. It is the real homeland of Turks since thousands of years… Turkish race exists in Anatolia since ancient and unknown times. The autochthonous people of Anatolia are Turanis in accordance with historical knowledge." (p. 3). Then the book attempts to prove with historical sources that the peoples living in Middle East; Frigs, Lydians, Sumerians and Hittites were in fact Mongol, Turk or Turani.

## History Textbooks

An Outline of Turkish History (*Türk Tarihinin Ana Hatları*) is the first initiative of writing a history textbook based on the Thesis. The aim of the book was to discontinue the underestimation of Turks, observed in multiple western sources, also used as late Ottoman and early Republican history textbooks[11]. It is stated in the introduction that the principal aim of the book was to correct the demeaning of the roles of Turkish people in world history and similar mistakes which have been harmful for the Turkish people who lived with this conscious. Additionally, it was indicated that rewriting the history of the Turkish nation whose personality and unity was awakened with all recent experiences would provide the upbringing of confident Turks, proud to be a big and powerful nation of deep racial roots (1930, p.1 - 3).

An Outline of Turkish History (*Türk Tarihinin Ana Hatları*,1930) is a significant illustrator to show the secular understanding in creation of the book. In the first volume of the book, genesis of the universe and formation of life patterns in the world is explained completely in Darwinist view (Karal, 1977) as a reflection of Ataturk's positivist-scientific approach. The composition period of the book is also an important indicative of the state-education, and especially history education relations and interpenetrations. The copies of the book were handed out to the authorities and experts in order to obtain their decisions and views. However, the book was not approved by Atatürk and some of the historians. Amending these copies, Atatürk personally tried to minimize the words which did not comply with his opinions. İsmail Hakkı Uzunçarşılı (1939) also expressed that the book was insufficient to be a textbook. The reason for this was, in spite of all the objections of the experts, the book was written in haste. Moreover, some authors of the book had written issues, which were not their field of expertise. Besides, there were many mistakes and insufficiencies in the book. Some important sources about the topics were not used in the book. Consequently, the book was made a companion course book with an introduction of 90 pages within the next year and this book would be the basis of the famous four volume history textbooks which were to be published in 1932.

In 1931, the History Survey Committee (*Tarih Tetkik Heyeti*), which was an extension of the Turkish Hearths, was superseded by the Turkish History Survey Committee (*Türk Tarih Tetkik Cemiyeti*)[12]. The first attempt of THSC was to provide new history textbooks to be written. The four volume History (*Tarih*) published in 1931 for high schools was written by the same team and with direct inspiration from An Outline of Turkish History (*Türk Tarihinin Ana Hatları*). The simplified editions of these books were published in 1933 in 3 volumes History for Secondary Schools (*Ortamektep İçin Tarih*). These books, based on the Turkish History Thesis, are important in terms of reflecting the understanding of history of the state, in other words, official history. Those books subjected to certain changes in the course of time were symbolic of Atatürk Era and they up to date have formed the basic dynamics of history teaching and education in the schools of the Turkish Republic.

In the introduction part of the first volume of History for Secondary Schools (*Ortamektep İçin Tarih 1*, 1933, p. 20 - 21), race and language characteristics in the survey of human history was defined as distinguishing features of communities. Concept of race defined as the people coming from the same blood with similar physical characteristics, was supported by the different classifications of Arthur Gobineau and Eugene Pittard. However, it is also stated in the book that racial differentiations is not so important in terms of history and added that "Although the basic distinction for classification of races is the skull shape, it has no sociological meaning." (1933, p.19). In linguistic categorization, Turkish was considered as the first and most important language among all. Moreover, it was claimed in the book that although the Turkish race mingled with the neighboring races, it conserved its personality. In spite of this mingling, the Turkish race could conserve its own characteristic by its superior nature and common language. Besides this, the book numerously emphasized that the Middle Eastern, Anatolian and Mediterranean peoples such as Hittites and Phoenicians were of Turkish origin.

Similarly, the aim of the book was written as foreword in each of the volumes of History as (1932, p. 5). Until recent years Turkish History has been one of the least studied subjects in our country. Under the influence of the animosity generated by the over 1,000 years old confrontation between Islam and Christianity, conservative historians strove hard to present the history of the Turks, who were the upholders of Islam for centuries, as merely consisting of adventures full of blood and blaze. On the other hand, Turkish and Muslim historians have fused Turkishness and Turkish civilization with Islam and Islamic civilization; they regarded it a necessity of *ummah* politics and duty of faith to make people forget the pre-Islamic epochs of thousands of years. In more recent times, the policy of Ottomanism dreamt of creating one nation out of the numerous elements in the Ottoman Empire. In addition to the above-mentioned two, it contributed as a third factor to cloak the name Turk and, not only to neglect, but also to erase National History from the pages it was already written on.

11. Utkan Kocatürk, in his interview with Afet İnan, asked her how she handled the issue of Turks being called as second (yellow) race. Mrs. İnan told him that she had read on secondary level history and geography textbooks that Turks were barbarians and of subordinate race when she was a student. Then she immediately showed one of them to Atatürk and after reading, he proclaimed that "No, it's not like that! We really need to make serious researches about Turkish, this can't be like that! Not convenient with the reality!". Utkan Kocatürk, "Prof. Dr. Afet İnan'la Bir Konuşma", *Atatürk Araştırma Merkezi Dergisi*, 3 (1), 1985

12. According to Copeaux, with those institutional changes, the state will be the direct producer of historical discourse by taking historical researches into control. Etienne Copeaux, *Tarih Ders Kitaplarında* (1931 - 1993) *Türk Tarih Tezinden Türk-İslam Sentezine*, (trans. A. Berktay), İstanbul, 1998, p.40

All these negative currents of course found their way into school programs and books. The practice to associate Turkishness as the synonym of concepts like a tent, tribe, horse, weapon and war crept into our schoolbooks.

Turkish History Survey Committee, which has been working to reveal the rebuffed and forgotten Turkish history in its sheer veracity, has appointed some of its members with the duty of preparing a book to fill this gap in history teaching.

## Turkish History Congresses

After the target of writing history textbooks for the new nation was completed, a congress was held mainly to open the textbooks to discussions among scholars and teachers, and to introduce the thesis officially to larger masses. First Turkish History Congress was organized with the initiative of Atatürk in 1932. During the Congress, the participants were split into two main groups. The first group was the well-known politicians, historians, intellectuals and ideologists like Akçuraoğlu Yusuf, Köprülüzade Fuat, Afet İnan, Samih Rifat, Reşit Galip, Yusuf Hikmet, Hasan Cemil and Şemseddin Günaltay most of whom were also the members of *Türk Tarihi Tetkik Heyeti* assigned to write *Türk Tarihinin Ana Hatları*. The outline and the content of the official history were determined by them who were "assigned as the historians of the party" (Aydın, 1996, p.107)

Fuat Köprülü and Zeki Velidi Togan were members of the second group who didn't approve the way the thesis was defended and founded. They criticized mainstream politician-historians methodologically, claiming as they didn't use the primary sources. However, their reactions couldn't be strong and clear; otherwise they would be judged as non-scientific and anti-nationalist[13].

The Second Turkish History Congress was held in 1937 and archeology, linguistics and anthropology were the main topics of the congress. One of the core subjects discussed in that congress was Sun Language Theory (*Güneş Dil Teorisi*). This theory was based on the assertion that Turkish language was the main source of all languages. The impetus in putting this theory forth was, as in Turkish History Thesis, to prove the ancientness and continuity of Turkish language. Additionally, in the word of Şemseddin Günaltay, "with Sun Language Theory, Turkish language is set free from Islamic dominance" (Günaltay & Tankut, 1938, p.27). That is to say, the chains with Islamic past were broken linguistically as language was one of the core elements of culture and thus a big step was taken in secularization.

The focus was rather on Anatolia in that congress and archeology was the most preferable discipline by the researches to demonstrate that Turks were the autochthonous peoples of this land. Common approach of the researchers was an attempt to prove with archeological findings that Turks had always been the natives of Anatolia since the emergence of first civilizations and that all civilizations in Anatolia were of Turkic origin. Thus, the ancient civilizations in Anatolia and Near East such as Hittites and Sumerians had emerged from Turkish race. Those archeologists supported their claims by asserting that all the findings from archeological diggings belonged to Turkish culture[14]. Actually, archeology became a tool of legitimizing Turks being "indigenous peoples and real owners of Anatolia" as a part of Turkish History Thesis.

The main aim of both the congresses was to impose and procure acceptance of Turkish History Thesis; thus, the defenders of that approach became considerably closed to different viewpoints. Saffet Arıkan, Minister of Education declared at the opening speech of the Congress that Turkish History Thesis is based on sciences especially archeology and anthropology, thus cannot be confuted (1937, p.2). Similarly, Günaltay stated that the Thesis was analyzed and clarified through scientific methods and the complainants were given the right to declare their arguments and objections at the congress and declares that "Yet it was so easy to confute all those objections and critics due to not having any scientific value. The criticisms ended with the signification of the thesis' scientific value once again. At the Second History Congress, Turkish History Thesis absolutely gained the victory" (1938, p. 338).

Actually, Turkish History Thesis wasn't just peculiar to Turkish history. Most of the researches presented in Turkish History Congresses were based upon German and Hungarian historical and archeological studies. Those studies were based upon the understanding of cultural evolutionism which became famous across Europe as a consequence of growing nationalism.

13. At the second day of the congress, Zeki Velidi Togan criticizes one of the presentations about Turkish race and culture. First, Yusuf Akçura and Reşit Galip react and cut his speech. Then Şemseddin Günaltay says that "(...) But Zeki Velidi Bey has strongly opposed the formation of Turkish union at Ufa Congress and separated Başkırts from Turkish community (*shame on you voices*). By opposing and preventing a progress towards a union of culture and dialect (language) among all Turks with the feeling of national solidarity and Turkish dialect, Zeki Velidi Bey has caused the separation of Russian Turks in many pieces such as Tatars, Başkırts, Özbeks, Azeris which have different cultures and languages. Wonder if Zeki Velidi Bey wanted to act the same role also in this congress? Yet, he has to be sure that those gathering around this congress are burning with the flame of nationhood. Any intent, any attempt against this flame is condemned to melt." (Continuous and furious applauses)." (First Turkish History Congress, p. 400)

14. İnan, in one of her interviews, strongly claims that the items taken out in this land are no doubt Turkish handworks and all belonged to Turkish civilization. She shows a gammadion and explains that "...this gammadion is just the same with the one that the national socialist party uses in today's Germany; however those golden gammadions which have been digged out of Anatolian soil prove that these have been symbols used by Turks and our Turkish ancestors all along." in "Türk Tarih Kurumu Asbaşkanı Bayan Prof. Afet ile Mülakat", *Belleten*, 2 (5 - 6), 1938 s. 253 - 256

The late 19th century witnessed the rise of *culture-historical archeology* which promotes a sense of ethnic identity and basically assumes that the peoples composing a nation is inherently homogeneous and has a historical continuity. Thus, to construct the past, this type of research aims to trace the origins (ethnogenesis) (Aydın, 1996). Many nations constructed their own genealogies to build a national consciousness of identity and to provide their political legitimacy. For instance in France, the impact of nationalism on archeology was reflected as emphasizing the solidarity of national groups. Napoleon III ordered large-scale excavations to prove Celtic origins of France and to enhance the power of his regime. Similarly, Polish historians searched their Slavic roots in their territory since prehistoric times (Aydın, 1996).

Definition of archeological culture and systematic application to the interpretation of archeological data was in fact, Gustav Kossinna's attempt with his publication *Die Herkunft Der Germanen* (The Origin of the Germans) in 1911 which was a glorification of German prehistory as a biologically pure master race. Kossinna evaluated archeology as a tool of determining the ancestry roots and historical developments of a people. His declaration of archeology as the most national of sciences and the ancient Germans as the noblest subjects for archeological research supported German nationalism and became much popular during Nazi regime. During this period, prehistory of Germans, as the largest "pure race" was glorified (Trigger, 1989, p.163 - 4). For Kossinna, Schleswig-Holstein was the cultural centre of Europe and Near East and cultural innovations were spread from this area to periphery through migrations.

Actually Kossinna was not acting differently from other archeologists. Archeology in each region reflected racist attitudes in different ways and became widespread in Western world during the 20th century. Aydın (1996, p.117) assesses this period of Germany as the initiative of cultural and racial legitimation of appearing with the hegemonic nations and having a share of world's wealthiness during nation-state building process. Hence, this understanding of nationalistic archeology and cultural history bestowed a legitimation tool to countries which aimed to build nation-states.

In fact, the debates on racism and nationalism had a wide sphere of influence through anthropology and philology. The studies mainly German and Austrian anthropologists have focused on were about physical appearance of human body from the beginning of the 19th century and different racial classifications were formulated in terms of skull types or color of skin. Among those studies, Swiss anthropologist Eugene Pittard's ideas about skull types gained importance within Turkish researchers. With the findings of the diggings, Pittard introduced that Turks were brachycephalic whose origins were Central Asia; came to Anatolia through migrations and laid the foundations of Anatolian civilizations. The topics discussed in the First and Second History Congresses were also largely related with Pittard's brachycephalic arguments. However, in his speech in the Second History Congress as honoured guest and complimentary chairman, Pittard (1943, p.77) claimed something different from the Turkish History Thesis and emphasized that Turks, as the oldest peoples of Anatolia were the products of a synthesis of peoples having different political and social norms, different names and languages[15].

Turkish History Thesis was also reflected on the program of primary schools written in 1936. In the part of this program related with history courses, statements "to emphasize the role of the Turkish nation in the world history through making the children comprehend how the Turkish people established culture in Central Asia and how this culture and language spread around the world, to make them feel their national individualism… The teacher should make clear the great role of the Turkish race especially in history; showing the young how the Turks established a civilization in Middle Asia... how the Turkish race, adopting various names all over the world, spread their culture... how the nations called *Sumerians* and *Hittites* are of the Turkish race... through animated samples that the student could grasp, and perpetuate the national conscious and national individualism inside them…" are expressed (1936, p. 78).

The traces of the thesis can also be seen at the RPP program which was accepted in 1935. The articles under the title of 'National Education' clearly show how the official historiography was integrated with the ruling cadre and reflected on educational system: Article 41. Our main principles for national education are as follows: ...(b) The training of strongly republican, nationalist, populist, etatist, secular and revolutionist citizens must be fostered in every degree of education. To respect and make others respect the Turkish nation, the Grand National Assembly of Turkey, and the Turkish state must be taught as a foremost duty. (c) The main goal is to give importance to physical as well as mental development and especially increase them to upper levels as our deep history with national character has inspired... (d) Education must be high, national, patriotic, and far from all sorts of superstitions and foreign ideas… (f) Our party lays an extraordinary importance upon citizens knowing our deep history. This knowledge is the sacred essence that nourishes the indestructible resistance of the Turk against all currents that may prejudice the national existence, his capacity and power, and his sentiments of self-confidence. (g) We shall continue our serious work in rendering the Turkish language a national, perfect language... (1935, p. 28).

15. This focus on Anatolia would later give way to Anatolianism as a view.

## Conclusion

After the First World War, collapsing of empires was one of the radical changes in political arena and with the effect of nationalist movements, Ottoman Empire gave way to Turkish Republic under the motive of Turkish nationalism. Within the first 10 years, the Republic made radical reforms in line with the ideology of the revolution. 1930s became a period of crystallization of the Republican ideology and integrating the whole society to the new system in a rather authoritarian way in Turkey. Throughout 1930s, Kemalist historiography aimed to construct citizens adaptable with the new nation through history courses. This period also witnessed rising of authoritarian single-party regimes. Hence, this character was reflected to the historiography of this period. The official historiography with the base of Turkish History Thesis was created in this atmosphere in Turkey.

The impetus in formulating the official historiography was to make the new nation gain a consciousness of being Turk. Although the discourse seemed to be racist whilst emphasizing "belonging to white race" or "having racial connections with ancient civilizations"; in fact, with Karal's (1977, p. 258) definition it was a "defensive historiography" putting forth the Turks as being on the same level with contemporary western world both as culturally and historically. This was the main reason of perceiving ancient peoples as Turks - to adopt Anatolia through its complete past with all its values and culture.

Fuat Köprülü, in the foreword of Barthold's famous book History of Islam Civilization (*İslam Medeniyeti Tarihi*, 1940, p. 22 - 23), explains the understanding of this new historiography as every national history has such a romantic perspective at the beginning and this emotion will help in the development of historical studies. He states that this romantic period of national history was also apparent in Turkish nationalism due to the unfounded and unfair approach of European historiography. However, the reaction of this romantic historiography became extreme and exaggerated. The evaluation of every race and language as Turkic, gave way to racist views from time to time.

Although it appeared as extreme in some points, official historiography and writing textbooks in line with this perspective could be quite understandable during nation-building process. This was a certain era of constructing national identity among the society and in this context; state had total control over institutions as well as education. This condition would have changed and science should have gained its autonomy from the state, as also predicted by Köprülü (1940, p. 23); 'this *romantic history* period will also end here and historical studies will be based on scientific and objective methods'. However, until 1980s Turkish historiography remained traditional in terms of the topics being engaged and the methodology used.

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# School History Students' "Big Pictures" of the Past

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*Abstract - This paper presents the initial, tentative findings from a government funded research project from 2006 - 2008 into the historical consciousness of 14 - 16 year olds. The question of the extent, form and nature of pupils' historical knowledge is of major concern to both politicians and others involved in framing national curriculum history. The research drew upon existing ideas concerning pupils' historical orientation - both frameworks and their 'big pictures' of the past. The research explored the nature of pupils'/ historical consciousness in relation to findings about the nature of historical understanding. In particular, it involved investigating whether they had assimilated of disciplinary [second order] concepts such as change and a sophisticated understanding of the evidential basis for historical explanations and accounts. The study involved 36 pupils with an average age of 14 in year one from 3 schools and 15 pupils of an average of 15 in year two. The research was qualitative, using grounded theory.*

*Analysis of findings reveal student historical consciousness fell into three broad categories: vestigial, i.e. virtually non existent [c. 15%], event- like [factual] and process like. The majority of students [c. 50%] knowledge of the past took the form of event-like fragmentary, disconnected lists of events, topics and individuals. There was little evidence that these students possessed a coherent 'big picture' of the past that provided a coherent framework for producing explanatory narratives. A minority of students, c. 35%, were able to produce process like historical explanations using disciplinary concepts, although they were limited in the extent and depth of their substantive knowledge.*

*Keywords - Disciplinary concepts (e.g. change), grounded theory, historical consciousness, historical frameworks, identity, narrative, qualitative research, Rüsen, substantive or factual knowledge.*

## Introduction

Routinely politicians, public figures, academics and the media lament that young people today 'don't know any history'. In making this criticism commentators typically focus on students' alleged lack of knowledge of specific content items (e.g. the dates of the Second World War, the names of Henry VIII's wives, the location of the first colonial settlement in Virginia).

Unfortunately this is a weak conceptualization of what may be an important problem. It is weak because, as Wineburg has pointed out, the same criticism has been made for at least a century despite the fact that schools, teaching and society have all changed radically (Wineburg 2000). As Wineburg also has argued perhaps a need exists to more fully understand what students *do* know rather than concentrate on their alleged failings. But the conceptualization is weak for a more important reason: adolescents' memory of discrete items of information may be a poor indicator of their ability to use knowledge of the past for orientation in time. In fact in England it can be persuasively argued that the promotion of a fragmented topic-driven curriculum has prevented students from acquiring a meaningful big picture of either British or human history (Howson, 2007). Certainly, we cannot tell from tests of 'key facts' whether or not students leave school with a coherent framework of knowledge linking past, present and future which they can use to make sense of their place in the world.

A fundamental focus of our current research, therefore, is to try and understand in more sophisticated ways what conceptions of the past young people have (e.g. what *do* they know? What understandings of history as discipline do they hold? What big picture of the past have they acquired?). A vital element of our research is also to understand how students situate their own history within the context of national and global history. Do students, for example see the passage of history as something that is dead and gone, dull and irrelevant, or do they have some appreciation that they are part of an unfolding narrative of change and development in which they have agency and one which is inherently relevant to their own lives?

An important dimension of our current research is also to try and explore a few key questions relating to so-called historical knowledge 'frameworks'[1]. The questions include:

- What kind of relationship should exist between students' understandings of key disciplinary concepts (e.g. change) and the acquisition of substantive or factual knowledge?
- What kinds of coherent and usable historical framework do students need to make sense of long swathes of history and to help orient them in time?
- How flexible can such a framework be? How should it relate to national and canonical knowledge?

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1. Over the past 30 years this has been discussed as 'frames of reference', a 'framework', a 'big picture', 'historical orientation'. More recently it has been described as 'chronology' and 'narrative'.

More specifically this paper offers a tentative first step in understanding the various and complex ways in which students access, refer to and use the past in order to orientate themselves in time. By focusing on students' conceptions of change it also examines the vital relationship between students' substantive historical knowledge and their second order understandings. In so doing the paper explores the ways in which the relationship between these conceptions influence how students construct a "big picture of the past".

## The Broader Context

This paper is drawn from a larger, ongoing research study (2006 - 2008) funded by the UK government's ESRC (Economic and Social Research Council) that examines students' usable historical pasts (UHP) (Foster, Ashby and Lee, 2006). The central focus of the study is to advance our understanding of the kinds of pasts available to students for orientation in time. Specifically, its aim is to explore:

- The organization, structure and ontology of the pasts students employ;
- The degree to which and the ways in which students use these pasts in thinking about the present and future;
- The extent to which students' available pasts develop over time, among both those who study history and those who do not.

Fundamental to the research investigation is the quest to explore and to understand how students construed the "story" of British history and to analyse the various ways this historical knowledge is structured and employed. Accordingly the central research questions that drive this larger study are:

*How far and in what ways (if at all) do students call upon the past in thinking about the present and the future?*
*In particular, what kind of past do students address?*

- How coherently organized is it? Is it a collection of discrete events, or does it recognize occurrences as more or less significant within themes that give meaning to its component parts? Does coherence increase over time (whether or not the students study history)?
- How far and in what ways does it recognize change? For example, is change seen as random and unpredictable, or as part of what makes the world intelligible?
- What ontology is employed in it (tacitly or explicitly)? For example, does it contain states of affairs and processes as well as events and actions? Does it include unintended changes as well as rational decisions?
- Is it an evidential and provisional past, or is it seen as something given?
- Is it socially and culturally inclusive, or does it privilege some part of humanity?

For all these, are there developments in ideas over time? Are there differences between those who study history and those who do not?

## The Significance of the Proposed Study: Two Research Traditions

Recent research in Europe has tended to ask questions about students' historical consciousness: how children and adolescents relate past, present and future in order to orient themselves in time. In contrast, UK researchers have been more concerned with students' understanding of the discipline of history: how they think knowledge of the past is possible, and the development of their understanding of second-order concepts like *evidence, change* and *historical accounts*[2]. In recent decades researchers in North America have increasingly turned to these questions, and more recently have made important contributions to advancements in understandings of historical consciousness, but here too the traditions have not been related to one another[3].

Rüsen's account of historical consciousness, which provides the theoretical basis for much of the European research, has not hitherto led to any rapprochement between traditions. This is paradoxical, since Rüsen's analysis of the discipline of history is at the root of many of his ideas about historical consciousness. Considerable work has been undertaken in Germany and other European countries on students' substantive views of the past in relation to the present and future. However, any adequate theory of historical consciousness and any empirical research into its development in students need to pay attention both to students' understanding of the discipline of history and to their temporal orientation.

This study represents an initial attempt to bring these two research traditions into contact with one another. In the UK not enough is known about the ways in which students explicitly and implicitly refer to the past, and what *kind of past* it is that they use (the substantive frameworks to which they have access).

But understanding the kind of past they use also demands that we try to understand the ways in which students' second-order (disciplinary) ideas - for example, of *change* - relate to their substantive pictures of the past, and to their ideas about how things happen.

Overall, therefore, the study is significant because in exploring students' acquisition of developmental narratives of change, flexible knowledge frameworks, and "big pictures" of the past, it draws on the different research traditions and is directly related to theoretical and empirical work associated with historical consciousness (Lee, 2004b; Rüsen, 1993; Seixas, 2004), historical narratives (Shemilt, 2000), and usable "big pictures" of the past (Lee, 2004a; Wilschut, 2001; Shemilt, 2006; Howson 2007).

## Research Framework and Methods

Although the broader study involved a longitudinal design and incorporated a range of tasks and interview questions, the element of the study reported here explored how students (36 in year one and 48 in year two) responded to selected aspects of the study[4]. Following an extensive piloting process in which the research instruments were tested and refined, all the students completed written tasks which required them to outline the history they had studied and to produce an overarching account of 2,000 years of British history. In addition, students were asked questions related to their notions of historical change[5]. Furthermore, in order to explore students' understandings and conceptions of the past in more detail, the written task was supplemented by a series of semi-structured interviews with all of the students.

The written responses were collected from a purposive sample of students in each of three London schools. Twelve students from each school participated in year one (when their average age was 14) and 16 in year two (when their average age was 15)[6]. The three schools selected for the study were broadly representative of institutions with high, average, and low national examination results in history. The schools also reflected the broad range of socio-economic, ethnic, and cultural diversity typical of the London area. The interviews were conducted with all students participating in groups of four people.

The theoretical framework that underpinned the research was drawn (a) from a qualitative research paradigm based on grounded theory (e.g., Strauss, 1987; Strauss and Corbin, 1990) and (b) the theoretical propositions and constructs advanced in the philosophy of history (e.g., Borries, 1998; Oakeshott, 1933, 1962, 1983; Rüsen, 1993, 2005; Wertsch, 2002). The overall aim of the study was to map the various and complex ways that students refer to and access the past. "Mapping" students' perspectives on, and reference to, the past necessitated the construction of exploratory inductive categories. Coding categories informed by the work of Barton (2001), Rüsen (1993, 2005), Shemilt (1983, 2000) and Wineburg (2001) were ultimately developed from ongoing and systematic analysis of the students' written responses to tasks and the transcripts of semi-structured interviews.

## Frameworks and Big Pictures

Although no universally agreed usage or definition of terms is yet apparent, it is perhaps useful to clarify how some of the central concepts may be construed. Drawing on the work of Shemilt and Lee a "big picture" is treated here as an overview of long passages of the past developed into a narrative structure. A framework, however, is different in that it offers a structure for conceptualising the past which does not take a narrative form. Frameworks, or frames of reference, can take on many complexions. In England, for example, a popular framework is to structure history around the names and dates of the kings and queens of England. Unfortunately, however, if the purpose of a framework is to allow students to develop a flexible variety of meaningful narratives, using a list of monarchs as a framework has huge limitations.

Lee & Howson helpfully articulate the importance of distinguishing between a "big picture" narrative and a framework of the past:

*One reason for separating the idea of a framework from that of a narrative is that people have had, and continue to have, frameworks of the past which are not narratives. A framework is just that. It provides a frame or scaffold within (or around) which narratives can be built. A narrative (whether canonical or not) is very different from a framework, because narratives organize the past in ways that impart to it specific meanings. A framework may be more or less useful for answering certain kinds of questions, and may be constructed in order to make some stories easier or more difficult to tell, but it does not of itself provide any particular story* **(Lee & Howson 2006).**

2.  There is no agreed international terminology for such concepts. Arguably the most common usage, derived from British work in the 1970s, is 'second-order concepts'. Other descriptions employed for these concepts are 'disciplinary' and 'metahistorical'.
3.  This may now be changing with, for example, work by Seixas and his colleagues on both wider issues of historical consciousness and second-order understanding (people's ideas about how we can know the past).

4.  The larger sample in the second year is explained by the addition of 12 students who had dropped history at age 14.
5.  For selected examples of student written tasks and the semi-structured interview questions see Appendix 1.
6.  In Year 1, 36 students participated. In Year 2 the same 36 students participated again. In Year 2 the extra 12 students who had no formal history education post-aged 14 also participated in the study.

Ultimately, therefore, as Lee advocates, "at the point at which the framework itself begins to turn into a narrative it becomes the big picture.[7]"

Attempting to provide students with a "big picture" of the past, however, takes us into complex and difficult terrain. Indeed, it is reasonable to suggest that we do not know yet how to teach a big picture that is "open" enough to avoid claiming to be the sole story, but coherent enough to be usable. Nevertheless what is certain is that a meaningful history education must help students orientate themselves in time and it must also allow them to recognize the limitations and opportunities that the past allows. But, it must be emphasised that a given and fixed story imposed on students does not constitute a history education. By definition the big picture must at all times be flexible, open to interpretation, and informed by historical understanding and historical process.

## Study Focus: Big Pictures and Change

As discussed above, a significant aspect of this study focused on both students' second order understandings of change and their ability to construct big picture accounts of the past. It is important to emphasise that this research constitutes work in process and that the analysis only offers some tentative and preliminary findings. Nevertheless in the context of the theoretical argument for orientation outlined above, the study principally focused on the ontology that these students employed when asked to account for 2,000 years of British history. We examined the kinds of disciplinary understandings that students drew on in constructing these accounts and we also investigated the extent to which students explicitly or implicitly incorporated ideas about change and significance in constructing their accounts of the past[8].

Needless to say we found considerable variety in the accounts produced during the study as it involved students from different socio-economic, cultural, ethnic and school communities. It also included students who had elected history as an option at GCSE[9] and those who had not[10]. Despite the fact that a National Curriculum for History exists in England and a broad consensus of teachers supports the need for a disciplinary approach to the subject, it would be inappropriate to suggest that history is taught in uniform ways[11]. Therefore, to capture more generalized understandings we limited our analysis of student accounts to two broad ontological categories that we defined as 'event like' and 'process like'[12].

The first coded category[13], 'event like', was defined as those accounts that gave priority to events, topics, and 'and then' narratives. The category also incorporated accounts where processes or states of affairs either did not feature or were clearly secondary. The second category, 'process like', was defined as those accounts that gave priority to processes, strands, themes and states of affairs; where events featured but did not dominate the account. If evidence of a coherent process like pattern was detected, also included were ordered chronological accounts (narratives or timelines) and general periodizations. Beyond these two broad categories was an outlying category that included accounts in which students did not answer the question, could not understand it, claimed that it was impossible to answer for various reasons, or indeed wrote an account that was not historical, but addressed only current events.

Before we examine exemplar accounts it seems sensible to make it clear that, at this stage, our main aim is to show a range of ideas that might help us frame more pointed questions related to big pictures in the future. For the present, we can do no more than note some of the common aspects of students' constructed accounts that may be the result of various influences on young people evident both inside and outside of school.

Overall, as will be outlined below, the range of ideas about change and significance appeared to be quite narrow for this age group and big picture accounts that had process-like aspects supported by reasonable substantive history proved few and far between. Further, even the most sophisticated student accounts were limited in their conceptions of change and significance.

7. Although Lee's specific remark remains unpublished it is referenced in, Howson, J. (2007). '"Is it the Tuarts and then the Studors or the other way around?" The importance of developing a usable big picture of the past,' *Teaching History*, 127, 40 - 47. It should also be noted that we are not advocating a single framework. In fact it is important that students are engaged in developing multiple frameworks as they address different questions at different scales over different time periods. Essential to the process, therefore, is the underlying assumption that different frameworks will shape the construction of historical narratives that are flexible and by their very nature continuously open to revision.

8. An additional aspect of our study was to explore how understandings of the nature of change over time influence the kind of big pictures students produce. However, as some of the data is still under analysis, we are not in a position to report findings on this yet.

9. The GCSE (General Certificate in Secondary Education) is a national qualification typically awarded to students on completion of a two-year course in individual subjects in the final year of compulsory education (i.e., for students aged 16).

10. Although we can't define this as a finding at this stage, it would appear that students were consistent in the kind of account that they generated each year. For example, if a student wrote an event like account the first year it is very unlikely that he/she would write a process like account the next year.

11. For example, "disciplinary approach" may mean different things to different teachers who will also hold their own views on the importance of some historical content. Furthermore, some teachers may sometimes be directed to deliver a syllabus constructed around specific aims promoted by departmental or faculty leadership.

12. There are numerous other aspects and features of these accounts that fit within and across both categories, the substance of which will be discussed below but we would argue that they do not alter the basic nature of the account.

13. We used NVivo 7 for all coding on this project.

Few students, for example, reached the upper range of the theoretically and empirically informed progression models developed as a result of the CHATA research project during the 1990s (see, for example, Lee & Ashby, 2000; Ashby, Lee & Shemilt, 2005) and more specifically the six-level model for "change" as advanced by Shemilt & Lee[14]. Of course, the limitations of students' responses are perfectly understandable given the age of the students, the constraints of the school curriculum, the vagaries of history teaching, and the alien nature of the task (i.e. it is not typical for students to be asked to consider broad perspectives on 2,000 years of history!). Nevertheless the research progression models were helpful both in benchmarking the quality of student responses and in providing some sense of the possible range of student ideas about the second order concept of change[15].

The first written task question: *'What History have you studied at school since the beginning of secondary school?'* provided us with data[16] on the participants' history studies since the age of 11 or 12 and offered some insight into how they conceptualized that experience[17]. The following were representative of the 80 student responses received across the two years of the research investigation[18].

Many students, for example, offered extensive topic lists indicating the history they had studied. Typifying the approach adopted by many others Julie and Ben[19] offered the following:

*The Great Plague, the Great Fire of London - how they started, impacts and solutions. WWI and WWII - what led to the events, who was in power etc. Treaties that were set, what happened after the war, Hitler became Chancellor, Nazism, Great Depression, Jews, Concentration Camps, Aryan race. Black civil rights in America - slavery etc. Ireland's history - rebellions + laws 1600s+. Oliver Cromwell - Catholics and Protestants.*

*We have studied Tudors - Henry VIII. Germany - Weimar, Hitler, Nazis, WWI, WWII. USA - depression, Wall Street Crash etc. Nazi Germany - Hitler. WWI. WWII. The lives of Black Americans. Women in America. Royalty - Queen Elizabeth I etc.*

Other students offered more limited and parsimonious outlines of their history education and expressed different levels of satisfaction with their studies. Thus, Jack and Alisha respectively claimed:

*I have studied history for 3 years on the World War and King Henry VIII and I found it very useful and a bit interesting.*

*Since I've been in school I've learned about nearly all the same things mainly WW2. We have never learned about Black History especially in Black History* **Month.**

A smaller proportion of students chose to detail the history they had studied at different points in their education. Typically they began with history at year 7 (when aged 11 - 12) and concluded with an account of history at year 9 or year 10 (when aged 15 - 16):

**Warren:** *Years 7 - Romans, Industrial Revolution, Year 8 - Slave trade and Civil rights, Year 9 - Britain and WWI, issues of WW2, not WW2 itself, Year 10 - WW1, Britain, build up to WW2, e.g. Weimar, Hitler etc., Northern Ireland.*

**Alex:** *If I remember correctly, during year 7 we studied the Normans and stuff or something. Year 8 is a total blank, can't remember. Year 9 we studied the industrial revolution and Nazi Germany. Currently in Year 10, we are doing Crime and Punishment and Nazi Germany once a week. I think History is being taught well at x school. We are due to start Jack the Ripper for coursework.*

Despite the different level of detail offered by these students their overall approach was similar. Above all, what was interesting about these students' lists was simply that; they were lists. In the main these lists consisted of topics, events, colligations, individuals and periods, sometimes broken down by year group and sometimes not. Mostly, student lists were not arranged in any particular order and no distinctions were made between categories. It is reasonable to speculate that these lists were constructed as they were remembered during the exercise.

14. See APPENDIX 2, p. 142 for the Progression Model for "Change".

15. It is important to emphasize that the progression models only informed our work. They indicated a possible range of ideas about the nature of change. Thus, they acted as a guide rather than as a prescriptive model.

16. There is also considerable interview data on this question still to be coded.

17. Since the Educational Reform Act of 1988 schools have a responsibility to deliver a government-mandated National Curriculum. The students in this study were taught in schools governed by "Curriculum 2000", which incorporated a revised version of earlier National Curriculum mandates. Appendix 3 details the broad framework of history study content intended for students aged 7 - 14. It should be noted that, in September 2008, "Curriculum 2000" will be replaced by a new history curriculum (see www.nc.uk.net).

18. 80 responses were received out of a possible 84.

19. All names used are pseudonyms. The pseudonyms were selected from the 100 most popular names registered at birth in England and Wales (see, ww.statistics.gov.uk/specials/babiesnames)

Analysis of students' responses also revealed the prominence of a narrow range of topics while great substantive swathes of British history received no attention at all. In addition some evidence of how present-day concerns appeared to some extent to determine the nature of the English history curriculum and students' perceptions of the past was also evident in students' responses. Of greater significance, on the basis of this question (i.e. *'What History have you studied at school since the beginning of secondary school?'*) only 2 student responses suggested that they viewed the past as more than a series of unconnected topics. In stark contrast to the majority of other students, these two students offered some indication (albeit rudimentary) that history study involved an appreciation of the process of change and significance. But, as indicated such responses were rare. In fact 97.5% of student responses principally were based on lists of historical phenomena.

## Accounting for 2,000 Years of British History

To further explore their conceptions of the past students also were required to complete the following written task:

*Tell the story of British History in the last 2,000 years or so up to now. Try and give a big picture of what was **going on**. By the way when we say 'going on' we mean that we don't want just facts and dates but are interested in a big picture of what was happening.*

The 83 recorded student responses[20] to the written task revealed a variety of approaches. In overview, 49% of responses were categorised as "event like" with 35% broadly construed as "process like". In addition, 16% were categorised as outliers. These outliers included the responses of students who viewed the past as irrelevant, disconnected, and, for some, limited by the scope of recent memory. They also included the responses of students who were consumed with the contemporary world and who provided accounts that were in no way past referenced. Examples of "outlier" responses included:

**Kate:**  *I don't know about British History 2,000 years ago. I don't even care about it.*

**Dylan:**  *I wasn't born yet so I don't remember.*

**Adam:**  *I can't do this. My knowledge does not stretch out as far as 2,000 years.*

### Evidence of 'Event Like' Accounts

More typically 49% of student responses were categorised as "event like"[21]. Often these students constructed accounts made up of random topic lists or partial narratives. For many students the task proved very difficult and revealed a lack of substantive and disciplinary understanding. One student, representative of others in this category, candidly remarked:

**Gabriel:**  *I am struggling with this question because it is a long period of time to condense. If the question gave a shorter period of time, then it would be easier, but as it stands, I feel that after Jesus was crucified, that I miss out a great deal of time because I can only seem to remember the Titanic sinking in 1912, the Russian Revolution, England winning the World Cup, 9/11, 7/7.*

Other students offered more substantive detail, but in so doing exposed a lack of deeper historical understanding. For example, the following students, Joseph and Samuel, offered a catalogue of historical topics, events, individuals, and miscellaneous material:

*Medieval times, Battle of Hastings 1066, William of Normandy, Shakespeare, King Eward, Henry VIII and his 8 wives, Tudors, Stuarts, Queen Elizabeth, Victoria, Elizabeth II, World War 1&2, Jack the Ripper, Magret Thatcher, Gulf War, Cold War, Vietcong, Vietnam, nuclear bombs, Hollywood, cinema, cars, planes, the moon, space travel, Tony Blair, George Bush, Iraq war, terrorism, £ vs. euro, all other currency in europe except £.*

*In British history in the last 2,000 years ago up until now many things have happened. Kings and Queens ruled England. Also, England invaded many different countries and made them part of the coloney. Things such as the Black Plague happened where many people died because of the plague. The Battle of Hastings happened. Different types of kings ruled who were different religions, to the future rulers, such as King Henry who was a Catholic and Queen Mary who was a Protestant. The Tudors ruled. Anglo-Saxons invaded Britain. The Great Fire of London happened. The Victorians ruled. Also what people were wearing changed as times passed. The Titanic sunk where many people survived and only a few lived to tell the tale. The First World War happened and the Second World War happened which was because of The Treaty of Versailles. The currency changed. Parliament has taken over and monarchy has less power than they did before, however they still have some power up till this day.*

20. 83 responses were received out of a possible 84.
21. Note: students in this category fixed on topic lists even though the question prompted them not to do so.

Representative of the majority of students in this study these two examples illustrated how typically events and topics were viewed by students as unconnected and arbitrary. They also exposed a general lack of any sophisticated chronological or conceptual understanding.

In contrast the following section illustrates how some students were able to conceptualise 2,000 years of British history in more sophisticated ways. As will be shown, a number of student responses (35%) appeared to move beyond producing random topic lists or partial or truncated narratives and provided some indication that they construed history as an unfolding process of change and development.

### Evidence of 'Process Like' Accounts

It is important to note, however, that some significant differences were evident in the 35% of responses categorized as process like. For example, within this broad category although a number of students produced accounts that illustrated a subtle shift away from seeing history as a catalogue of unconnected topics, very few were able to include much in the way of substantive history. Consider, for example, the following account:

**Sophia:**  *In the last 2,000 years, Britain has experienced many things. We have gone from being ruled by the Tudors to Elizabethans etc. We have conquered nations and been into huge wars. We were involved in revolutions that have changed our society dramatically. We have had countless ammounts of problems revolving around colonisation of LEDC's such as India and also even in earlier years there were small wars with people that are family, such as Mary and Elizabeth both daughters of Henry the Eighth but yet had so much conflict over who would rule based on religion. Another large chunk of history has been also because of racism.*

On the one hand Sophia's account represented an attempt to see history in broad overview. To her credit also embedded in the account is an understanding that enduring themes (e.g. about empire, religion, the authority to rule) and particular historical strands (e.g. social, political) have shaped the British past. On the other hand, however, relevant historical detail is lacking and the relationship between substantive and disciplinary knowledge is not easily discerned.

In the next example, Dominic similarly made some attempt to describe history as an unfolding process shaped by slow, processional, and evolutionary change:

*Loads has gone on since then, the first difference I spotted was that people mind's changed throughout the generations. Technology has changed with the advance. The world was slowly shedding it's skin from an old crumply one to a fresh new one. By this I mean that the world has changed into a better place, although there are still wars going on poverty will still remain a large problem in the world as well as combating aids. Talking about wars, America and Britain joined forces to fight against Iraq and the terrorist, during 1910 - 1920 the first world war was set in motion, as America, Britain and Russia joined forces to retaliate on Hitler's bloody feudal war. It was the survival of the fittest, once the war was won, America went back and started to build weapons, Britain done same, Russia also done the same, I think this was to give out a warning to other countries that you wouldn't wanna start a war with us. So in this war there still wars raging, there... taking lives away and yet technology still supporting both weapons built by technology and pharmisutical medicines also designed and made by the technology.*

In addition, Dominic clearly recognized that change and progress are not synonymous. He demonstrated, for example, that despite improvements in modern society problems such as widespread poverty and the debilitating impact of AIDS remain serious contemporary issues. Furthermore, Dominic appreciated that advancing technology has the potential to be a positive or negative force (e.g., in the development of pharmaceutical medicines or in the development of military weapons). From another perspective, however, the account is problematic for not only is it chiefly focused on twentieth century events (sometimes confused), but also the relationship between substantive history and notions of change and significance is underdeveloped.

In fact only 10 student responses (or 12% of the total) offered an account that effectively suggests the importance of second order understandings of change and development. Consider, for example, Jacob's account below in which the past is outlined in the form of a time-line. But notice how the timeline moves beyond recounting discreet and unconnected events. Rather, implicit in the time-line is the recognition (albeit limited) that some themes, trends or processes are more important in the passage of British history:

**Jacob:**  *Timeline: Roman Invasion - Dark Ages - Medieval Ages - 1066 Norman invasion - Tudor era - Stuart era - Industrial Revolution - WWI - WWII - now (2007) War in Iraq. Britain was shaped, both socially and economically through numerous different countries. The multicultural Britain of today is the result of the Roman invasion, the Norman invasion, French influences, American influence, African influence. Socially, Britain is not British, it is a blend of numerous different cultures. Britain has been shaped by hundreds of wars, from the Roman invasion in the 1st century through to the civil war and relatively recently, both world wars.*

Jacob's account not only featured a substantive chronology of British history topics, it also demonstrated an appreciation that British society was and is shaped by enduring processes and themes related, for example, to cultural interaction, identity, and warfare[22].

Overall, however, despite the important differences in these last three examples, in contrast to those students who offered an event like account, they shared some commonalities. For example, although they may have projected present values and conceptions into the past and in some cases appeared to be working with limited or skewed substantive knowledge (a common feature across all accounts regardless of ontology), these contributions represented different and arguably more powerful ways of constructing big pictures of a national past. Some of these accounts were expressed in terms of single or multiple themes (e.g. empire) and strands (e.g. political, social, economic) and they tended to see change as more than single events or unrelated happenings. There is also a sense in which some students understood that not all differences with the past count as changes and that significance could be attached to a number of events that might indicate developmental patterns.

Some students even recognised that there were different kinds of change although, among this age group, most appeared to see all significant changes as turning points and ones usually for the better. We did not find any accounts that acknowledged different kinds of significance. Similarly, with very few exceptions, did we see accounts that recognised that multiple strands during the same period can have varying rates of change and move in contrary directions[23]. Certainly students did not seem to be working with the idea that change is not a natural feature of the world and that the changes asserted by historians may vary according to the scale of the period at issue, the questions asked and markers of change that they identify. Nevertheless, despite these obvious and understandable limitations, it is important to recognize that 35% of students found it possible to move beyond event-like accounts and see history as an unfolding process of change and development[24].

## Producing the "Big Picture" Beyond the Secondary School

It is important to stress that the issues raised in this paper are not simply issues for school history. In pilot studies dating back to 2002, and current research investigations, evidence exists that these limitations also apply to graduates. Since 2002 Lee and fellow researchers at the Institute of Education have gathered together over 200 accounts from graduate students as they prepare for a career in history teaching at secondary schools in England[25]. In these studies graduate students were asked a similar question to that posed for this study[26]. Although in most instances more substantive history was brought to bear on these accounts, there were very few graduates who examined the British (read: English) past in terms of broad patterns of change. For example, few construed the past as effectively as the graduate student below. In this example the student provided a rare thematic account that ranges across a broad expanse of time. He also employed language that explored patterns of change and the significance of events through a number of strands and themes:

*Politically, Britain has moved from a basis of feudal monarchy through the beginnings of baronial power, the creation of the first parliaments and familial power struggles that culminated in the establishment of the Tudor monarch and the concept of nationhood.*

***[The student then gives a thematic and periodized expansion of this…]***

*Religiously, the period covers the change from total religious control of the medieval church, the role of monasteries, the perpetual conflict between church and state. How this was completely transformed by the onset of the reformation, Henry VIII and the split with Rome. How the resultant binding of the Anglican Church to the Monarchy, shaped Britain from the period, the rise of religious questioning from Quakers and Puritans to Baptists and Evangelists. The influence of this religious mix on ideas of empire and British superiority, through to the present day and secular society we live in now.*

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22. To some extent Jacob demonstrated a similar approach when presented with the same task a year earlier. His account, also produced as a timeline, included: "0AD - Celts, Roman Invasion, more "culture" in Britain.?AD Saxon Invasion, Ancestors of "the British"(Feudal Age). 1066 AD Norman Invasion - Magna Carta, development of castles/warfare. Medieval age - British Music, entertainment. 1450AD - Wars of the Roses. 1478 - Tudor era? Shakespeare, ENGISH LITERATURE, expansion of "British" world, Sir Walter Raleigh - America (potatoes), wars with France and Spain. 1603 - Jacobean era - Gunpowder plot, parliament, civil war/revolutions (Ireland). 1800- Victorian era - Industrial revolution. 1900 - WW1 (1916?), Treaty of Versailles. 1939 - WWII - Battle of Britain. 1930/40 - tension in Ireland - Irish parliament. 1950 - partition in Ireland. 196? - start of "The Troubles" in Ireland. 1972 - Bloody Sunday. 2000 - Twin Towers - war with Afghanistan, war with Iraq."

23. Dominic's account detailed earlier in the paper proved a rare exception in this regard.

24. An intriguing aspect of this research was that - when asked to describe the history they had studied at school - 97.5% of students responded in a series of unstructured topic lists, but when asked to "Tell the story of British History in the last 2,000 years," 35% were able to begin to produce process like accounts. An issue for further investigation, therefore, is why and how some pupils in England appear able to write process like accounts when no evidence exists to suggest they are taught history in terms of open frameworks that allow for the construction of usable big pictures based on broad patterns of change.

25. It is significant to note that the graduates involved were accepted on to one of the most competitive teacher training programmes in England; a programme that typically requires a 2:1 in their degree subject as a minimum standard to be considered for interview.

26. The students were asked: "Please write an account of British history from roughly 1000 to 2000 CE to show and organize *significant changes in key themes* (as opposed to simply recounting events). It may help to think of the account as showing what was 'going on' rather than 'what happened'".

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As discussed above, we have no examples of this among the 14 to 16 years olds who participated in the UHP study - although a number were able to attempt what we considered to be process like accounts. The greater proportion of graduates either listed collections of topics, colligations, periods, individuals or events, sometimes in chronological order and sometimes not. Others attempted event-based narratives. Consider the following example that illustrates at least three typical features of this kind of narrative:

*In the 1060s King Edward the Confessor was King. However, he died on the 5th January 1066. Who would the throne go to now considering he had no children? In fact the crown went to a Norman King - William.*

*England was now ruled by Normans.*

*In the 16th century and the beginning of the 17th Century Britain was ruled by the Tudors. Henry VII all the way through to Elizabeth I. The 16th Century was a very significant period. It was the time of the Reformation where Catholic England became Protestant. Religion was central to everything i.e. foreign affairs, including crucial alliances. Also, in politics. However, after the death of Henry VIII's son Edward the?, the throne was succeeded to Mary Tudor. In her brief reign she reverted the country back to Catholicism.*

The first feature of such accounts is that they nearly all began with the Norman Conquest in the 11th Century and the events that directly preceded the Battle of Hastings. This is arguably an obvious place to start as the Key Stage 3 National Curriculum for History begins with the Norman Invasion. The benchmark date framed by the question also may have influenced student responses[27]. The second feature is that huge chunks of time were condensed, summarised in a sentence, or large periods of time were missed or passed over. Further, many of these accounts simply stopped at a point where it had become clear that the task was too unwieldy and could not be completed in the time allotted (no coherent notion of scale was apparent in such responses)[28].

As stated earlier, there is a great deal of work still to be done with this data and we have only scratched the surface by focusing on big pictures. We have yet to explore and code the participants' second order understandings of change, which take up a considerable part of the data. In addition we have not extensively examined views on the utility of history[29] as well as reflections on and conceptions of identity. We anticipate that examination of these relationships will provide us with understandings that will allow us to ask more directed questions about how 14 - 16 year olds construe the past for purposes of orientation, to the extent that they do at all.

This may all be very important, and not just for history as an academic subject in schools but, because, as noted by Lee:

*'History is an important part of an open society. It is arguably a necessary condition for the functioning of democracies, and may in turn depend for its long-term survival on the freedoms provided by democratic societies'* **(Lee, 2006).**

On the current basis the acknowledged fragmentary, topic driven nature of the English History Curriculum renders the subject pointless and irrelevant to many students and educators seeking to make hard decisions in an already crowded curriculum. This view is also supported by statements in the annual report for history produced by the Qualifications and Curriculum Authority. It noted that 'there is evidence that history is playing (and will play) an increasingly marginal role in the wider curriculum of schools' (QCA, 2005). However, committing a chronological narrative to memory is not the answer as a fixed story is likely to leave children helpless when faced with different questions about how the world in which they live has changed and developed. The development of a more relevant and useful conception of school history - one that considers the nature and status of historical knowledge and seeks to develop a more flexible framework for the purposes of orientation - could yield a much more powerful understanding of the past and possibly lead to a more engaged citizenry. This would require teaching history students how to articulate the past in terms of developmental narratives of change that do not ossify into fixed stories. The question remains whether or not educators, policy makers, and curriculum developers have the knowledge and commitment to embark on such an important enterprise.

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27. It is interesting to note that, although the UHP study asked for an accounting of 2,000 years of British History, a large number of students still began with the Norman Conquest or the birth of Jesus Christ.

28. 45 minutes in the case of the graduates. Note also that these failures to complete are not inferred by the researchers. Rather, they come from comments made by the participants themselves.

29. Although some work to establish categories from the data has.

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## APPENDIX 1: Research Instruments

### Written Task Questions (selected examples)

1. **What major changes confront the world today?**
   List five in order with number one being the most important.

2. **What about the future? What do you think will be the most serious changes in the next 50 - 60 years?**
   Again list five in order with number one being the most serious.

3. **Things change as time goes on. Does this mean that:**
   a. History is really useful?
   b. History is really useless?
   c. Explain why you think so.

4. **Does what you say apply to all history equally or some bits more than others?**

5. **What History have you studied at school since the beginning of secondary school?**

6. **Tell the story of British History in the last 2,000 years or so up to now. Try and give a big picture of what was going on.**
   (By the way when we say 'going on' we mean that we don't want just facts and dates but are interested in a big picture of what was happening).

### Interview Questions (selected examples)

1. **Think of any really important change that is likely to happen in the next 100 years.**
   Why will it happen?

2. **Think of any really important change that happened in the last 100 years.**
   Why did it happen?

3. **If you had to sum up the story of British history so far, from what you've done at school or from home (including TV, movies, books, or anything else) what kind of story would you say it was?**

APPENDIX 2: Change Progression Model: Shemilt & Lee © 2005

CHANGE: What is change in history and why does it matter?

1.  *Changes as events*
    What changed is the same as what happened. Changes are viewed as events or happenings in the past. Most of the time 'nothing happens' and then, for no particular reason, something does. Changes are independent of each other and there is no pattern or direction in the succession of changes - events - happenings. Changes are understood as happening quickly (the past is temporally and spatially shrunk).

2.  *Changes as differences between then and now*
    Changes are viewed as differences between then and now, or between two points of time in the past. Any and every difference, however trivial, is noted as 'a change'. These are usually encountered as differences observed between items of daily life that 'we' have and 'they' - in the past - did not. Other examples include differences between be earlier and later pictures of, say, a landscape; or between text descriptions of, say, typical days in the lives of two 10 year olds in different periods. There is usually an expectation that all such 'changes' will be for the better.

3.  *Change as significant difference*
    Not all differences count as changes. Change is linked with judgements about significance and, in particular, with judgements about significant differences between two or more points in time. The key development is that no more than a select few identifiable differences are deemed to be significant and hence to be markers of change. This linkage is as important for the understanding of significance as it is for that of change since it is only when linked to the concept of change that students make sense of historical significance and are able to distinguish it from intrinsic significance (e.g. the number of people immediately and directly affected and the severity of the effect) and perceived significance for people at the time. As before, there is usually an expectation that change is likely to be for the better. (This may be coupled with the idea that changes are the rational decisions of individuals.)

4.  *Changes differ in kind as well as significance*
    There are different types of change. Some changes may best be described as trends, or as continuous changes in one direction (e.g. arithmetical increases in population or in rates of industrialization). These are usually thought to be less historically significant than turning points, or changes that involve discontinuities in the rate or direction of change (e.g. when populations increase moves from the arithmetical to the geometric, or when manufacturing industry shifts from an increasing to a declining share of GDP).

5.  *Change in history has many strands*
    Our picture of change in history is complex and has different strands. Changes may take place in many aspects of history - political and economic, cultural and technological - over the same period, do so at varying rates and in contrary directions. Students may begin to note that positively and negatively valued changes, instances of progress and regress, may be linked. For example, developments that give work to the unskilled poor can destroy the livelihood of the skilled artisan.

6.  *Change as a tool to make sense of the past*
    The concept of 'change' is a tool that historians use to make sense of the past, to distinguish between more and less significant events and to link otherwise unrelated phenomena as instances of a change process. Students become clear that 'changes' are not a natural feature of the past itself which historians somehow discover much as geologists discover the boundaries between layers of sedimentary rock. The historical changes that historians assert and argue to have taken place over a given time period may vary according to the scale of the period at issue, the questions that they seek to answer and the markers of change that they identify. This does not mean that accounts of change are no more than a matter of opinion. It does follow, however, that such accounts will always attract scholarly debate about the methodological appropriateness of certain markers, or indices, of change and about the value positions underlying the questions that historians choose to ask.

APPENDIX 3: National Curriculum History

Known as "Curriculum 2000" (although published in 1999) the national curriculum provided students with a range of study topics (or units) that all children "should be taught". The summary chart below illustrates the units of history content for children aged 7 - 11 and 11 - 14.

FIGURE 1: History Study Units for Key Stage 2 and 3. National Curriculum History (1999), www.nc.uk.net

|  | Pupils Aged 7 - 11 | Pupils Aged 11 - 14 |
|---|---|---|
| Breadth of Study (6 units) | 1 local history unit; 1 unit of world history; 1 unit of European history; 3 units of British history. | 1 unit of European history; 2 units of world history; 3 units of British history. |
| Units | A local history study. | Britain 1066 - 1500. |
|  | Romans, Anglos-Saxons, and Vikings in Britain. | Britain 1500 - 1750. |
|  | Britain and the wider world in Tudor times. | Britain 1750 - 1900. |
|  | Victorian Britain OR Britain since 1930. | A European study before 1914. |
|  | A European history study. | A world study before 1900. |
|  | A world history study. | A world study after 1900. |