

BERNSTEIN'S THEORY OF THE PEDAGOGIC DEVICE AS A FRAME TO STUDY HISTORY CURRICULUM REFORM IN SOUTH AFRICA

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Abstract

This article reflects on the usefulness of Bernstein's theory of the pedagogic device to frame a (previously reported) study of history curriculum reform in South Africa: to what extent, and in what ways does the concept of Bernstein's pedagogic device assist in describing the recontextualising of the history curriculum? The article sets out the reasons for using the pedagogic device in that study as both a theoretical and methodological frame and a structuring frame which ordered the study and held the various parts together. This perspective locates the study in a field that engages with knowledge from a sociological lens. The article discusses the ways in which Bernstein's theoretical language supported and strengthened the research, and also shows how it was not specialised enough to engage specifically with the subject of history. Thus it was necessary to weave the field of history education and sociology of knowledge perspective together.

Keywords: Pedagogic device; History curriculum; Sociology of knowledge; Curriculum reform; South Africa.

Introduction

The subject of this article is the utility of Bernstein's pedagogic device as a frame for a study in history curriculum reform (Bertram, 2008a). The article is concerned with the methodological question: To what extent does Bernstein's pedagogic device assist in describing the recontextualisation of the history curriculum? The task in studying such a recontextualising is to follow the curriculum message as it moves from the curriculum writers, to the written curriculum document, to teacher training, to text book writers and finally to teachers in history classrooms. In the sociological dimension which is implicit

in such a process, the case study recognised that the ‘roll-out’ of a curriculum message is not smooth and that teachers will not easily and seamlessly adopt all the requirements of official policy (Ball, 2006), and that in fact ‘policy fractures’ (Davies and Hughes, 2009:596) occur as there are disjunctures between the espoused, the enacted and the experienced curriculum. The purpose was to describe how the official policy message is re-interpreted and recontextualised at various points in the implementation process.

The particular case of curriculum reform under scrutiny here is the National Curriculum Statement (NCS) (Department of Education, 2003) for Further Education and Training (FET) school history curriculum in post-apartheid South Africa, which was implemented in Grade 10 classrooms in 2006. The findings of the case study have been reported elsewhere (Bertram, 2008b, Bertram, 2006) and thus will not be repeated in great depth. The aim here is to describe the methodological issues of tracking the recontextualisation of the curriculum. The article begins with a brief overview of the literature on policy research in order to locate the present discussion within the broader field of sociology policy studies and then describes the design of the 2005–2006 case study and how it was informed and framed by Bernstein’s pedagogic device. Finally the article discusses how the theory and the methodology both supported and constrained the research in describing how the curriculum message was interpreted at different levels of the education system.

Ways of thinking about policy

De Clercq (1997) suggests that policies can be conceived of either as rational activities aimed at allocating resources and values or as exercises of power and control. Ball (2006:17) describes this binary as a contrast between a conception of policy which treats policies as ‘clear, abstract and fixed’ and one in which policies are ‘awkward, incomplete, incoherent and unstable’. The latter perspective assumes that policies do not emerge in a vacuum but reflect compromises between competing interests (Taylor et al., 1997) and in fact the expectation is that policy fractures will occur (Davies and Hughes, 2009). This perspective is often understood as critical policy analysis, or sociology policy analysis, and is the perspective in which this study is located.

These broad perspectives give rise to differing understandings of the relationship between policy-making and implementation. On one hand, there is the rational bureaucratic process model or state control model,

which assumes an unproblematic translation of policy into action, and on the other hand, the conflict and bargaining model, which understands the policy process as loosely coupled and impossible to tightly control (de Clercq, 1997). Generally policy makers and government officials would understand policy as a set of rational activities and be concerned that policies are correctly implemented, while academic researchers may be more concerned with issues of complexity, power and control. The study here is located within an understanding of policy as a complex and contested terrain.

Curriculum reform in South Africa and history

Although there were some curriculum changes from 1994 – 1997 (van Eeden, 1997), the major post-apartheid curriculum reform movement was Curriculum 2005, which collapsed the boundaries of knowledge and placed an emphasis on group work, relevance, local curriculum construction and local choice of content (Hoadley, 2011).

These were radical demands and different teachers interpreted them in very different ways (Jansen, 1999). History educators were particularly concerned that the subject was collapsed into the learning area called Human and Social Sciences (Seleti, 1997, South African Historical Society, 1998). Prof Kader Asmal, the new Minister of Education in 1999 instituted a review of *Curriculum 2005*. The Committee that reviewed *Curriculum 2005* recommended that the curriculum be streamlined and that the revised version (which came to be called the National Curriculum Statements) should detail the curriculum requirements in clear and simple language (Department of Education, 2000). These new curriculum statements introduced a stronger knowledge dimension to the school curriculum and reduced the number of learning outcomes per learning area (Chisholm, 2005, Chisholm, 2004). As a result of the curriculum review, a revised set of curriculum statements were developed in 2002 for the General Education and Training (GET) band, which comprises grades R–9. History was more firmly represented as a subject with its own learning outcomes, although still coupled with Geography in a learning area called Social Science. A set of National Curriculum Statements was developed for the Further Education and Training (FET) band (grades

10–12). It is the FET history curriculum that is described here.¹

The field of curriculum reform has provided a fertile ground for researchers over the past 15 years (cf. Harley and Wedekind, 2004, Morrow, 2000, Jansen, 1999, Reeves, 1999, Green and Naidoo, 2008). In terms of the history curriculum in particular, there are studies on the curriculum changes from 1994-1997 and the making of C2005 (Siebörger, 1997, Chisholm, 2004, van Eeden, 1997), on textbooks (Bertram and Bharath, 2011, Chisholm, 2008, Schoeman, 2009) and on assessment practices (Wilmott, 2005). Many studies have focused on the extent to which teachers have succeeded or failed in implementing the new curriculum. In this sense these take a ‘fidelity’ perspective (Christie et al., 2004), which carries the expectation that policy implementation (the enacted curriculum) should be true to the policy vision (the official curriculum).

Fidelity studies are underpinned by an implicit assumption that the curriculum policy text is infallible and that it represents the best of education practice and education research. This can be problematic in terms of research, as Ensor and Hoadley (2004) show in a review of a number of classroom observation instruments used in South Africa for a particular range of research projects in 1999 (the President’s Education Initiative). They found that most classroom observation schedules were informed by the requirements of the curriculum (for example, using group work as evidence of learner-centeredness) rather than by theoretically-informed teaching and learning strategies that actually created engaging learning environments. They argue that there is a need to find ways to describe what is happening in classrooms that are informed by research and theory rather than only in relation to what is required by the official curriculum documents. Bernstein (see next section) provides one such way of doing this through his theory of the pedagogic device and pedagogic discourse.

Explaining the pedagogic device

Basil Bernstein was a British social theorist who developed his sociological theory of pedagogy over a period of more than three. In a concise overview, Maton and Muller (2007) show how Bernstein’s theoretical thinking developed

¹ The school curriculum was reviewed again in 2009, and the revised versions of the National Curriculum Statements are now called the Curriculum and Assessment Policy Statements (CAPS). These are being implemented in classrooms in the Foundation Phase and in Grade 10 in 2012. This article does not deal with the NCS CAPS 2011.

from pedagogic code to pedagogic discourse and then to knowledge, in the latter part of his life and career. Bernstein's major focus was on understanding how education could be understood in its own terms, and not merely as a relay for social class and other inequalities. He believed that cultural reproduction studies examined what is carried or relayed by education, such as class, gender and race inequalities, rather than 'the constitution of the relay itself' (Bernstein, 1996:19). He argued that these studies failed to focus on any internal analysis of the structure of the discourse itself. He wanted to explicate the inner logic of pedagogic discourse and its practices.

Bernstein made a distinction between what is relayed (the message) and an underlying pedagogic device that structures and organises the content and distribution of what is relayed. The key process is recontextualisation, whereby knowledge produced at one site, the site of knowledge production (mainly, but not exclusively, the university), is selectively transferred to sites of reproduction (mainly, but not exclusively, the school). This process is not straightforward and cannot be taken for granted (Moore, 2004).

The pedagogic device is an attempt to describe the general principles which underlie the transformation of knowledge into pedagogic communication (Bernstein, 1996).

Bernstein uses the term to refer to systemic and institutionalized ways in which knowledge is recontextualised from the field of knowledge production into the school system and its distribution and evaluation within the schooling system (Jacklin, 2004). Singh (2002) describes it as an ensemble of rules or procedures described by Bernstein which provide a model for analysing the processes by which expert knowledge is converted into classroom talk and curricula. It allows a researcher to go beyond the normative question of how faithfully the official curriculum message is interpreted and implemented, to describing in nuanced ways the substance and nature of the message carried by the new curriculum and the ways in which the policy message is re-fashioned, recontextualised and re-interpreted as it moves through various levels of the education system.

According to Bernstein, the process of recontextualising entails the principle of de-location (that is selecting a discourse or part of a discourse from the field of production where new knowledge is constructed) and a principle of re-location of that discourse as a discourse within the recontextualising field (2000). In this process of de- and re-location, the original discourse undergoes an ideological transformation. This process 'presupposes intermediations and

produces dilemmas' (Lamnias, 2002:35). In this article, I want to evaluate the extent to which the pedagogic device is useful in describing this transformation and these dilemmas as they pertain to history curriculum reform in South Africa.

The distributive rules of the pedagogic device produce three main fields, the field of production, the field of recontextualisation, and the field of reproduction, which are involved in the production of pedagogic discourse (Singh, 2002). The field of production is the process by which new knowledge, discourses and ideas are created and modified, usually by university academics. The field of recontextualisation is the place where there is a selection of knowledge from the field of production, and this process results in the production of pedagogic discourse (Ensor, 2004). In the Official Recontextualising Field, the curriculum designers make selections about the knowledge, pedagogy and assessment that will become part of the official curriculum. Textbook writers and teacher trainers then interpret the curriculum document in the Pedagogic Recontextualising Field. The field of reproduction is the arena where teachers engage in pedagogic and assessment practice and where the evaluative rules regulate what counts as a legitimate production. Thus the pedagogic device points to the possible empirical fields within the education system for investigation.

A brief overview of the case study

The case study was designed to incorporate a wide range of data that would serve to track the 'official message' from the history curriculum documents through the various levels of the system to the pedagogic and assessment practices of teachers in classrooms. The new FET curriculum (Department of Education, 2003) was implemented in Grade 10 classrooms in 2006, and the study collected classroom and teacher interview data in the year before and during the first year of implementation. Data included analysis of the history curriculum documents, participant observation of a provincial teacher training workshop in 2005, interviews with writers and publishers from three major textbook publishing houses, classroom observation of three Grade 10 history teachers in three different co-educational high schools in 2005 and 2006, interviews with these teachers and analysis of the assessment tasks set by these teachers in 2005 and 2006.

The case study could be called a policy trajectory study (Ball, 1993), which analyses policy formulation, struggle and response from within the state itself through to the various actors who receive and interpret the policy. ‘The trajectory perspective attends to the ways in which policies evolve, change and decay through time and space and their incoherence’ (Ball, 2006:51). While Ball’s trajectory perspective delineates the contexts of research and enquiry, it does not provide a clear conceptual language with which to interrogate the contexts, nor a model of how the contexts relate to one another. The pedagogic device on the other hand, both identifies the fields of empirical research in the field of curriculum recontextualisation and provides a theory of pedagogic discourse that generates an external language of description, which is powerful tool of analysis within at least two of these empirical fields.

Bernstein’s method distinguishes between two qualitatively different languages in theory and research. On the one hand, there is the language of a theory itself – a language internal to it – and on the other, the language that describes those things outside the theory within the field it investigates, known as an external language of description (Moore, 2004). It is an external language because it enables the research to engage with the empirical data. Bernstein sees a close connection between the theoretical model and the methodology for data analysis (Jablonka and Bergsten, 2010). He provides the researcher not only with the contexts or fields to investigate curriculum reform, but also with an external language of description which enables one to describe and analyse the phenomena in each field. The analytic tools that Bernstein’s theory provides to engage with the data, will be described further on in the discussion.

The field of production and the case of history

According to Bernstein, the function of the distributive rules is to regulate the relationships between power, social groups, forms of consciousness and practice. Distributive rules specialise forms of knowledge, forms of consciousness and forms of practice to social groups. They establish who gets access to what knowledge – that is, to which privileged and specialised ways of classifying, ordering, thinking, speaking and behaving (Ensor, 2004). The distributive rules translate sociologically into the field of the production of discourse. It is in this field that the production of new historical knowledge may legitimately take place.

The field of production is primarily concerned with how knowledge is structured, and here Bernstein provides us with the distinction between vertical and horizontal knowledge structures (Maton and Muller, 2007, Bernstein, 1999). He states that vertical knowledge structures depend on a previous knowledge base while horizontal knowledge structures consist on incommensurable parallel languages (Muller, 2006). Martin (2007) suggests that history would be characterized as a horizontal knowledge structure because it is not hierarchically organized and learning new knowledge does not rely on previous knowledge. Its speciality comes from its mode of interrogation and the criteria for the construction of historical texts, rather than a search for a universal explanatory theory that encompasses all others.

A sociology of knowledge perspective brings different lens to the history curriculum, as writers within history curriculum and education tend to be more engaged with the content of the history knowledge in the curriculum (van Eeden, 1997) than with knowledge structures. The terms vertical and horizontal knowledge structures do not provide an understanding of the logic and structure of history as a specialised discipline. For this, it was necessary to look to historians and history educationists, such as Leinhardt (1994), Wineburg (2001), Lévesque (2008) and Seixas (1999; 2006) who have interrogated the ways in which historians understand the nature of their work. It appears that history is specialised in that historians must construct a compelling narrative with internal coherence that has considered all the evidence exhaustively. Thus, analytically, Bernstein's theory of vertical and horizontal knowledge structures were a starting point for the analysis of this field, but were not sufficient to interrogate history as a specialised discipline. In order to do this it was necessary to go to the field of history education and of curriculum studies more generally.

A useful distinction and analysis of history knowledge for school purposes emerges from Lee (2004) and Dean (2004), who drew on Schwab's (1978) two complementary strands: (a) syntactic or procedural knowledge, which is knowledge about conducting historical enquiry, and (b) substantive or propositional knowledge which represents the statements of fact and the propositions and concepts which are constructed as a result of the procedural investigations carried out by historians. This distinction between procedural and substantive knowledge became a useful analytic tool in the case study. This did not emerge specifically from Bernstein's language, but from the discourse of history education.

The official recontextualising field (ORF) and the history curriculum

The ORF is the field in which selected ministries and agents of the state make selections from the knowledge produced in the field of production and use these selections to design an official curriculum. What is considered legitimate knowledge produced by the discipline of history is recontextualised into the school curriculum. It is not only the nature of the knowledge structure that informs how this knowledge is recontextualised, but also pedagogical and political processes operating in this field. The empirical fields here are the process of writing the curriculum, and the actual curriculum document.

The members of the NCS history curriculum writing team were interviewed, with the aim of gaining an understanding about the process of writing the curriculum document. The team that designed the NCS curriculum said that there was strong external regulation by the State in the form of strongly framed guidelines regarding the organising of the curriculum around outcomes and assessment standards, as well as incorporating the constitutional values of democracy and inclusion.

The writing of any curriculum document is a product of a range of recontextualisations which have come before. School history education in South Africa has been, and continues to be (Siebörger, 2007) influenced by the curriculum changes which took place in Britain under the auspices of the British Schools' Council in the 1960s and 1970s (Schools Council History 13 -16 Project, 1976, Mathews, 1992). These changes brought about a new perspective on history teaching in which students were introduced to the nature of historical evidence, the nature of reasoning from evidence and the problem of reconstruction from partial and mixed evidence (Wineburg, 2001). There was a particular group of history educationists in South Africa who had embraced this epistemology and pedagogy in the 1980s (Kros, 1988), although during apartheid much history teaching was mostly located within the fact-learning objective tradition (Sishi, 1995). Generally all of the people writing the new history curriculum were located within the tradition of a constructed, interpreted approach to history teaching with a pedagogy which supports history as a mode of enquiry rather than the learning of objective facts. This approach dovetailed with the official curriculum focus where the curriculum had to be designed-up from learning outcomes, and thus the outcomes were articulated around the procedures of learning history at school, and not around particular propositional knowledge.

The FET curriculum history was strongly focused on procedural knowledge, and was thus quite closely linked to the work of historians in the field of production. As historians ask questions about the past and engage with sources, this is what the curriculum required of teachers and learners also. Thus it seems that there was a strong link between the Field of Production (academic historians' work) and the purpose of the NCS history curriculum document (in the ORF). Bernstein (1996) would argue that when a school subject is recontextualised, it is no longer derived from the intrinsic logic of the specialised discourse, but in the case of the FET history curriculum, there was an idea that learners would learn to do the work of historians.

The NCS history curriculum documents (2003) were analysed in a systematic and deductive way using the key concepts of classification and framing (Bernstein, 1971). Classification is about the strength of the boundaries between objects, and gives researchers a way of describing the extent of integration of knowledge seen in a curriculum document. Integration can be described as interdisciplinary if there is integration between history and other disciplines, as intra-disciplinary if there is integration between various themes or topics within history, and as inter-discursive if there is integration between history and what is generally understood to be 'everyday' or local knowledge. The analysis shows that greatest integration requirement in the curriculum document is within history (intra-disciplinary), as the knowledge is framed by key questions which bring together various key concepts, for example: "What was the link between the Atlantic slave trade and racism?". Thus we can say that at the level of intra-disciplinary integration, the curriculum is weakly classified (Bertram, 2006).

The theory of instruction informing the curriculum was analysed using the concept of framing, which concerns the extent to which the learner or the teacher has control of the selection, sequencing and pacing of the content (Bernstein, 1971). The curriculum shows that the envisaged theory of instruction is focused on the learner, who is described as developing a range of skills which are articulated by the learning outcomes. The concepts of classification and framing provide a useful language of description for curriculum document analysis, but do not capture all the key issues, and thus a broader qualitative analysis was also necessary. The concepts of procedural and substantive knowledge again became useful in the document analysis, which showed that the assessment standards give greater weight to the procedural (the 'how-to' of doing history) than to substantive knowledge (the

‘what’ of history knowledge). This was not evident using only the concepts of classification and framing, thus Bernstein’s external language of description was not sufficient to analyse the curriculum documents.

The ways in which teacher educators, textbook writers, and teachers interpret and engage with the official curriculum message becomes apparent in the next parts of the discussion.

The pedagogic recontextualising field (PRF) and professional development of teachers

This official curriculum message is interpreted and recontextualised by teacher educators and textbook writers in the pedagogic recontextualising field (PRF) as they train teachers, write textbooks or conduct research. One empirical field was a four-day provincial Department of Education (DoE) workshop held in October 2005 which I attended as a researcher and participant observer. The purpose of the workshop was to introduce teachers to the requirements of the new FET history curriculum, which was to be implemented in Gr 10 in 2006.

One of the issues that emerged from this data was the fact that most of the teachers present struggled enormously to work within the history ‘enquiry’ mode that underpins the new NCS FET curriculum. In one task, teachers needed to design questions for learners using a number of history sources that were given to them. However, very few of the 28 teachers present were able to design questions that required learners to actually engage with the sources as historical documents, and instead designed basic comprehension questions. This points to an epistemological gap in that the curriculum designers, and the teacher educators assume that teachers have knowledge of both the substantive and procedural aspects of the discipline of history, while most did not appear to have this knowledge. In Bernstein’s (2000) language, the teachers did not have the realisation rules necessary for them to produce the ‘history as enquiry’ practice legitimated by the curriculum. This will obviously impact on the way in which the curriculum message is recontextualised in classrooms.