Exemplar Book on Effective Questioning

History

Compiled by the Statistical Information and Research (SIR) Unit

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PREFACE

The National Senior Certificate (NSC) examinations are set and moderated in part using tools which specify the types of cognitive demand and the content deemed appropriate for History at Grade 12 level. Until recently, the level of cognitive demand made by a question was considered to be the main determinant of the overall level of cognitive challenge of an examination question.

However, during various examination evaluation projects conducted by Umalusi from 2008-2012, evaluators found the need to develop more complex tools to distinguish between questions which were categorised at the same cognitive demand level, but which were not of comparable degrees of difficulty. For many subjects, for each type of cognitive demand a three-level degree of difficulty designation, *easy, moderate and difficult* was developed. Evaluators first decided on the type of cognitive process required to answer a particular examination question, and then decided on the degree of difficulty, *as an attribute of the type of cognitive demand*, of that examination question.

Whilst this practice offered wider options in terms of *easy, moderate* and *difficult* levels of difficulty for each type of cognitive demand overcame some limitations of a one-dimensional cognitive demand taxonomy, other constraints emerged. Bloom's Taxonomy of Educational Objectives (BTEO) (Bloom, Engelhart, Furst, Hill, & Krathwohl, 1956) and the Revised Bloom's Taxonomy are based on the assumption that a cumulative hierarchy exists between the different categories of cognitive demand (Bloom et al., 1956; Bloom, Hastings & Madaus, 1971). The practice of 'levels of difficulty' did not necessarily correspond to a hierarchical model of increasing complexity of cognitive demand. A key problem with using the level of difficulty as an attribute of the type of cognitive demand of examination questions is that, questions recognised at a higher level of cognitive demand are not necessarily categorised as more difficult than other questions categorised at lower levels of cognitive demand. For example, during analyses a basic recognition or

recall question could be considered more difficult than an easy evaluation question.

Research further revealed that evaluators often struggled to agree on the classification of questions at so many different levels. The finer categorization for each level of cognitive demand and the process of trying to match questions to pre-set definitions of levels of difficulty made the process of making judgments about cognitive challenge overly procedural. The complex two-dimensional multi-level model also made findings about the cognitive challenge of an examination very difficult for Umalusi Assessment Standards Committee (ASC) to interpret.

In an Umalusi Report, *Developing a Framework for Assessing and Comparing the Cognitive Challenge of Home Language Examinations* (Umalusi, 2012), it was recommended that the type and level of cognitive demand of a question and the level of a question's difficulty should be analysed separately. Further, it was argued that the ability to assess cognitive challenge lay in experts' abilities to recognise subtle interactions and make complicated connections that involved the use of multiple criteria simultaneously. However, the tacit nature of such judgments can make it difficult to generate a common understanding of what constitutes criteria for evaluating the cognitive challenge of examination questions, despite descriptions given in the policy documents of each subject.

The report also suggested that the Umalusi external moderators and evaluators be provided with a framework for thinking about question difficulty which would help them identify where the main sources of difficulty or ease in questions might reside. Such a framework should provide a common language for evaluators and moderators to discuss and justify decisions about question difficulty. It should also be used for building the capacity of novice or less experienced moderators and evaluators to exercise the necessary expert judgments by making them more aware of key aspects to consider in making such judgments.

The revised Umalusi examination moderation and evaluation instruments for each subject draw on research and literature reviews, together with the knowledge gained through the subject workshops. At these workshops, the proposed revisions were discussed with different subject specialists to attain a common understanding of the concepts, tools and framework used; and to test whether the framework developed for thinking about question difficulty 'works' for different content subjects. Using the same framework to think about question difficulty across subjects will allow for greater comparability of standards across subjects and projects.

An important change that has been made to the revised examination evaluation instrument is that the analysis of *the type of cognitive demand* of a question and analysis of *the level of difficulty* of each question are now treated as two separate judgments involving two different processes. Accordingly, the revised examination evaluation instrument now includes assessment of difficulty *as well as* cognitive demand.

LIST OF ABBREVIATIONS

Abbreviation	Full name
ASC	Assessment Standards Committee
BTEO	Bloom's Taxonomy of Educational Objectives
CAPS	Curriculum Assessment Policy Statement
DBE	Department of Basic Education
FET	Further Education and Training
IEB	Independent Examinations Board
NSC	National Senior Certificate
NQF	National Qualifications Framework
QAA	Quality Assurance of Assessment
QCC	Qualifications, Curriculum and Certification
SIR	Statistical Information and Research

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1. INTRODUCTION

The rules of assessment are essentially the same for all types of learning because, to learn is to acquire knowledge or skills, while to assess is to identify the level of knowledge or skill that has been acquired (Fiddler, Marienau & Whitaker, 2006). Nevertheless, the field of assessment in South Africa and elsewhere in the world is fraught with contestation. A review of the research literature on assessment indicates difficulties, misunderstanding and confusion in how terms describing educational measurement concepts, and the relationships between them, are used (Frisbie, 2005).

Umalusi believes that if all role players involved in examination processes can achieve a common understanding of key terms, concepts and processes involved in setting, moderating and evaluating examination papers, much unhappiness can be avoided. This exemplar book presents a particular set of guidelines for both novice and experienced History national examiners, internal and external moderators, and evaluators to use in the setting, moderation and evaluation of examinations at the National Senior Certificate (NSC) level.

The remainder of the exemplar book is organised as follows: First, the context in which the exemplar book was developed is described (Part 2), followed by a statement of its purpose (Part 3). Brief summaries of the roles of moderation and evaluation (Part 4) and cognitive demand (Part 5) an assessment. Examination questions selected from the NSC History examinations of assessment bodies, the Department of Basic Education (DBE), and/or the Independent Examinations Board (IEB) are used to illustrate how to identify different levels of cognitive demand as required by the Curriculum and Assessment Policy Statement (CAPS) History document (Part 6). Part 7 explains the protocols for identifying different levels of difficulty within a question paper. Application of the Umalusi framework for determining difficulty described in

Part 7 is illustrated, with reasons, by another set of questions from a range of History examinations (Part 8). Concluding remarks complete the exemplar book (Part 9).

2.   CONTEXT

Umalusi has the responsibility to quality assure qualifications, curricula and assessments of National Qualification Framework (NQF) Levels 1 - 5. This is a legal mandate assigned by the *General and Further Education and Training Act (Act 58 of 2001)* and the *National Qualification Framework Act (Act 67 of 2008)*. To operationalize its mandate, Umalusi, amongst other things, conducts research and uses the findings of this research to enhance the quality and standards of curricula and assessments.

Since 2003, Umalusi has conducted several research studies that have investigated examination standards. For example, Umalusi conducted research on the NSC examinations, commonly known as 'Matriculation' or Grade 12, in order to gain an understanding of the standards of the new examinations (first introduced in 2008) relative to those of the previous NATED 550 Senior Certificate examinations (Umalusi, 2009a, 2009b). Research undertaken by Umalusi has assisted the organisation to arrive at a more informed understanding of what is meant by assessing the cognitive challenge of the examinations and of the processes necessary for determining whether the degree of cognitive challenge of examinations is comparable within a subject, across subjects and between years.

Research undertaken by Umalusi has revealed that different groups of examiners, moderators and evaluators do not always interpret cognitive demand in the same way, posing difficulties when comparisons of cognitive challenge were required. The research across all subjects also showed that

using the type and level of cognitive demand of a question *only* as measure for judging the cognitive challenge of a question is problematic because cognitive demand levels on their own do not necessarily distinguish between degrees of difficulty of questions.

The new Umalusi framework for thinking about question difficulty described in this exemplar book is intended to support all key role players in making complex decisions about what makes a particular question challenging for Grade 12 examination candidates.

3.   THE PURPOSE OF THE EXEMPLAR BOOK

The overall goal of this exemplar book is to ensure the consistency of standards of examinations across the years in the Further Education and Training (FET) sub-sector and Grade 12, in particular. The specific purpose is to build a shared understanding among teachers, examiners, moderators, evaluators, and other stakeholders, of methods used for determining the type and level of cognitive demand as well as the level of difficulty of examination questions.

Ultimately, the common understanding that this exemplar book seeks to foster is based on the premise that the process of determining the type and level of cognitive demand of questions and that of determining the level of difficulty of examination questions are two separate judgements involving two different processes, both necessary for evaluating the cognitive challenge of examinations. This distinction between cognitive demand and difficulty posed by questions needs to be made in the setting, moderation, evaluation and comparison of History examination papers.

The exemplar book includes an explanation of the new Umalusi framework which is intended to provide all role-players in the setting of History examinations with a common language for thinking and talking about

question difficulty. The reader of the exemplar book is taken through the process of evaluating examination questions; first in relation to determining the type and level of cognitive demand made by a question, and then in terms of assessing the level of difficulty of a question. This is done by providing examples of a range of questions which make different types of cognitive demands on candidates, and examples of questions at different levels of difficulty.

Each question is accompanied by an explanation of the reasoning behind why it was judged as being of a particular level of cognitive demand or difficulty, and the reasoning behind the judgements made is explained. The examples of examination questions provided were sourced by History evaluators from previous DBE and the IEB History question papers, pre- and post- the implementation of CAPS during various Umalusi workshops.

This exemplar book is an official document. The process of revising the Umalusi examination evaluation instrument and of developing a framework for thinking about question difficulty for both moderation and evaluation purposes has been a consultative one, with the DBE and the IEB assessment bodies. The new framework for thinking about question difficulty is to be used by Umalusi in the moderation and evaluation of Grade 12 History examinations, and by all the assessment bodies in the setting of the question papers, in conjunction with the CAPS documents.

4. MODERATION AND EVALUATION OF ASSESSMENT

A fundamental requirement, ethically and legally, is that assessments are fair, reliable and valid (American Educational Research Association [AERA], American Psychological Association [APA] and National Council on Measurement in Education [NCME], 1999). Moderation is one of several quality assurance assessment processes aimed at ensuring that an assessment is fair,

reliable and valid (Downing & Haladyna, 2006). Ideally, moderation should be done at all levels of an education system, including the school, district, provincial and national level in all subjects.

The task of Umalusi examination **moderators** is to ensure that the quality and standards of a particular examination are maintained each year. Part of this task is for moderators to alert examiners to details of questions, material and/or any technical aspects in examination question papers that are deemed to be inadequate or problematic and that therefore, challenge the validity of that examination. In order to do this, moderators need to pay attention to a number of issues as they moderate a question paper – these are briefly described below.

Moderation of the technical aspects of examination papers includes checking correct question and/or section numbering, and ensuring that visual texts and/or resource material included in the papers are clear and legible. The clarity of instructions given to candidates, the wording of questions, the appropriateness of the level of language used, and the correct use of terminology need to be interrogated. Moderators are expected to detect question predictability, for example, when the same questions regularly appear in different examinations, and bias in examination papers. The adequacy and accuracy of the marking memorandum (marking guidelines) need to be checked to ensure that they reflect and correspond with the requirements of each question asked in the examination paper being moderated.

In addition, the task of moderators is to check that papers adhere to the overall examination requirements as set out by the relevant assessment body with regard to the format and structure (including the length, type of texts or reading selections prescribed) of the examination. This includes assessing compliance with assessment requirements with regard to ensuring that the content is examined at an appropriate level and in the relative proportions (weightings) of content and/or skills areas required by the assessment body.

The role of Umalusi examination **evaluators** is to perform analysis of examination papers after they have been set and moderated and approved by the Umalusi moderators. This type of analysis entails applying additional expert judgments to evaluate the quality and standard of finalised examination papers before they are written by candidates in a specific year. However, the overall aim of this evaluation is to judge the comparability of an examination against the previous years' examination papers to ensure that consistent standards are being maintained over the years.

The results of the evaluators' analyses, and moderators' experiences provide the Umalusi Assessment Standards Committee (ASC) with valuable information which is used in the process of statistical moderation of each year's examination results. Therefore, this information forms an important component of essential qualitative data informing the ASC's final decisions in the standardisation of the examinations.

In order for the standardisation process to work effectively, efficiently and fairly, it is important that examiners, moderators and evaluators have a shared understanding of how the standard of an examination paper is assessed, and of the frameworks and main instruments that are used in this process.

5. COGNITIVE DEMANDS IN ASSESSMENT

The *Standards for educational and psychological testing* (AERA, APA, & NCME, 1999) require evidence to support interpretations of test scores with respect to cognitive processes. Therefore, valid, fair and reliable examinations require that the levels of cognitive demand required by examination questions are appropriate and varied (Downing & Haladyna, 2006). Examination papers should not be dominated by questions that require reproduction of basic

information, or replication of basic procedures, and under-represent questions invoking higher level cognitive demands.

Accordingly, the Grade 12 CAPS NSC subject examination specifications state that examination papers should be set in such a way that they reflect proportions of marks for questions at various level of cognitive demand. NSC examination papers are expected to comply with the specified cognitive demand levels and weightings. NSC examiners have to set and NSC internal moderators have to moderate examination papers as reflecting the proportions of marks for questions at different levels of cognitive demand as specified in the documents. Umalusi's external moderators and evaluators are similarly tasked with confirming compliance of the examinations with the CAPS cognitive demand levels and weightings, and Umalusi's revised examination evaluation instruments continue to reflect this requirement.

Despite that, subject experts, examiners, moderators and evaluators are familiar with the levels and explanations of the types of cognitive demand shown in the CAPS documents, Umalusi researchers have noted that individuals do not always interpret and classify the categories of cognitive demand provided in the CAPS the same way. In order to facilitate a common interpretation and classification of the cognitive demands made by questions, the next section of this exemplar book provides a clarification of each cognitive demand level for History followed by illustrative examples of examination questions that have been classified at that level of cognitive demand.

6. EXPLANATIONS AND EXAMPLES OF QUESTIONS ASSESSED AT THE DIFFERENT COGNITIVE DEMAND LEVELS IN THE HISTORY TAXONOMY ACCORDING TO CAPS

The taxonomies of cognitive demand for each school subject in the CAPS documents are mostly based on the Revised Bloom's Taxonomy (Anderson and Krathwohl, 2001) but resemble the original Bloom's taxonomy in that categories of cognitive demand are arranged along a single continuum. Bloom's Taxonomy of Educational Objectives (BTEO) (Bloom, Engelhart, Furst, Hill, & Krathwohl, 1956) and the Revised Bloom's Taxonomy imply that each more advanced or successive category of cognitive demand subsumes all categories below it. The CAPS Taxonomies of Cognitive Demand make a similar assumption (Crowe, 2012).

> **Note:**
> In classifying the type and level of cognitive demand, each question is classified at the highest level of cognitive process involved. Thus, although a particular question involves recall of knowledge, as well as comprehension and application, the question is classified as an 'analysis' question if that is the highest level of cognitive process involved. If evaluating' is the highest level of cognitive process involved, the question as a whole should be classified as an 'evaluation' question. On the other hand, if one of more sub-sections of the question and the marks allocated for each sub-section can stand independently, then the level of cognitive demand for each sub-section of the question should be analysed separately.

The CAPS documents for many subjects also give examples of descriptive verbs that can be associated with each of the levels of cognitive demand. However, it is important to note that such 'action verbs' can be associated with more than one cognitive level depending on the context of a question.

The History CAPS document states that Grade 12 NSC History examination papers should examine three levels of cognitive demand (Table 1).

Table 1: **Levels and types of Cognitive Demand for History according to the History Examination Guidelines for Grade 12, 2014**

Cognitive levels	Historical skills
Level 1 (L1)	• Extract evidence from sources • Selection and organisation of relevant information from sources • Define historical concepts/terms
Level 2 (L2)	• Interpretation of evidence from the sources • Explain information gathered from sources • Analyse evidence from sources
Level 3 (L3)	• Interpret and evaluate evidence from sources • Engage with sources to determine their usefulness, bias, reliability and limitations • Compare and contrast interpretations and perspectives presented in sources; draw independent conclusions.

To facilitate reading of this section, each of the above cognitive demand levels in the History Taxonomy is explained, and the explanation is followed by at least **three** examples of questions from previous History NSC examinations classified at each of the levels of cognitive demand shown in Table 1. These examples were selected to represent the **best and clearest** examples of each level of cognitive demand that the History experts could find. In the discussion below, each example question explains the reasoning processes behind the classification of the question at that particular type of cognitive demand (Table 2 to Table 4).

Note:

Be mindful that analyses of *the level of cognitive process* of a question and *the level of difficulty* of each question are to be treated as two separate judgments involving two different processes. Therefore, whether the question is easy or difficult should not influence the categorisation of the question in terms of the type and level of cognitive demand. Questions should NOT be categorised as higher order evaluation/synthesis questions because they are difficult questions. Some questions involving the cognitive process of recall or recognition may be more difficult than other recall or recognition questions. Not all comprehension questions are easier than questions involving analysis or synthesis. Some comprehension questions may be very difficult, for example, explanation of complex scientific processes. For these reasons, you need to categorise the level of difficulty of questions separately from identifying the type of cognitive process involved.

Table 2:   **Examples of questions at Level 1**

- Extract evidence from sources
- Selection and organisation of relevant information from sources
- Define historical concepts/terms

Example 1:
Question: DBE History P1, 2011 1.1.1   According to the source (below) which country was a threat to Cuba? (1x1) (1) 1.1.2   Why did Khrushchev choose to assist Cuba? Give TWO reasons. (2x1) (2) *Source 1A* **The following source is the viewpoint of N. Khrushchev, President of the USSR, of the Cuban Missile crisis. *(Taken from Khrushchev Remembers by S. Talbot)*** *We welcomed Castro's victory of course, but at the same time we were quite certain that the invasion was only the beginning and that the Americans would not let Cuba alone … one thought kept hammering away at my brain. What would happen if we lost Cuba? I knew it would be a terrible blow to Marxist-Leninism. It would gravely reduce our stature throughout the world, but especially in Latin America. If Cuba was to fall, other Latin American countries would reject us, claiming that for all our might, the Soviet Union hadn't been able to do anything for Cuba, but make empty protest to the United Nations …*

Discussion:

1.1.1 This question requires candidates to recognise that it was America that was a threat to Cuba. The sentence in the source that holds the answer is '*the Americans would not let Cuba alone*'. Candidates need to recognise that this phrase means that America was a threat to Cuba. They are not required to interpret the text, but to locate, identify and extract the information that America was a threat to Cuba.

1.1.2   The answer to this question is found in Source A in the 3rd, 4th and 5th sentences. Khrushchev chose to assist Cuba because the consequences of losing Cuba would be:

a) 'a terrible blow to Marxist-Leninism';
b) it would 'reduce the stature of the USSR';
c) 'Latin American countries would reject the USSR' because it had not been able to defend Cuba.

Candidates are not required to interpret the text, but to locate, identify and extract two of the reasons that Khrushchev chose to support and assist Cuba.

Memorandum/Marking guidelines

1.1.1   America (1x1) (1)

1.1.2

- Wanted to protect Marxist-Leninism in Central America
- Wanted to ensure the spread of communism in Latin America
- Prevented the demise of Russian stature throughout the world
- Latin America would reject Russia (communism)
- Protect Cuba from American aggression
- Wanted to create a communist sphere of interest in Latin America
- Any other relevant response (any 2x1) (2)

Example 2:

Question:

DBE History P1, November 2012

Question 4: How did the philosophy of Black Consciousness influence the Soweto Uprising of 1976?

4.1.1 According to the source, what was the fastest growing philosophy among the black South African youth? (1x1)

Source 4A

This extract focuses on the influence that the philosophy of Black Consciousness had on the Soweto Uprising of 1976. It was written by John Kane- Berman who was a member of the SRC at the University of the Witwatersrand.

One of the principle factors explaining the new mood of assertiveness (self-confidence) so evident among black youth in many parts of the country – is the growth of the Black Consciousness philosophy. This is one of the most important developments in South Africa in recent years …

Discussion:

4.1.1 The answer to this question is evident in the first sentence of the source. Candidates need to be able to identify and extract the answer from this sentence. There is no interpretation of the text necessary. The similarity between the question

phrased ('growing philosophy among the black South African youth') and the text which holds the answer ('*growth of the Black Consciousness philosophy*') also support the categorization of this question as a Level 1 question with regard to cognitive demand.
Memorandum/Marking guidelines 4.1.1 Black consciousness (1x1)
Example 3:
Question: <u>DBE History P2, November 2012</u> 3.1.1 Why according to the source (3A) is 2 February 1990 regarded as a significant date in South Africa's history? (2x1) *Source 3A* **The extract below focuses on FW de Klerk's reform measures after 1990.** *On 2 February 1990, de Klerk announced major reforms. He announced the unbanning of the ANC, CPSA and the PAC, the scrapping of the Separate Amenities Act, the lifting of the emergency media regulation and a moratorium (suspension) on the death penalty. Most sensational of all, he announced that Nelson Mandela and other political prisoners would be released soon with no preconditions. (…)*
Discussion: Question 3.1.1 relies on candidates recognising the appropriate information and extracting the information from the source material. The source clearly states that de Klerk announced a range of major reforms on 2 February, and candidates would need to see that it is these reforms that make the date significant in South African history.
Memorandum/Marking guidelines 3.1.1 • Led to the unbanning of the ANC, CPSA and PAC • Announced major reforms • Scrapping of the Separate Amenities Act • Lifting of the emergency media regulations • Suspension of the death penalty • Release of Nelson Mandela and other political prisoners • Ending of apartheid • Any other relevant response (Any 2x1) (2)

Table3:   Examples of questions at Level 2

- Interpretation of evidence from the sources
- Explain information gathered from sources
- Analyse evidence from sources

Example 1:
Question:

DBE History P1, 2011

Question 1: How did the Cuban Missile Crisis contribute to Cold War tensions between the USSR and the USA in the 1960s?
Consult Source 1 C.

1.3.1 What message does the cartoonist wish to convey by portraying the American leaders as ravens? (1x2) (2)

SOURCE 1C

Below is a Soviet cartoon which shows HS Truman, D Eisenhower and R Nixon as ravens (birds of prey) of war urging JF Kennedy to continue his battle against Cuba. The magnifying glass is used over a map of Cuba. Date unknown.
Taken from *Essential Modern World History* by S Waugh.
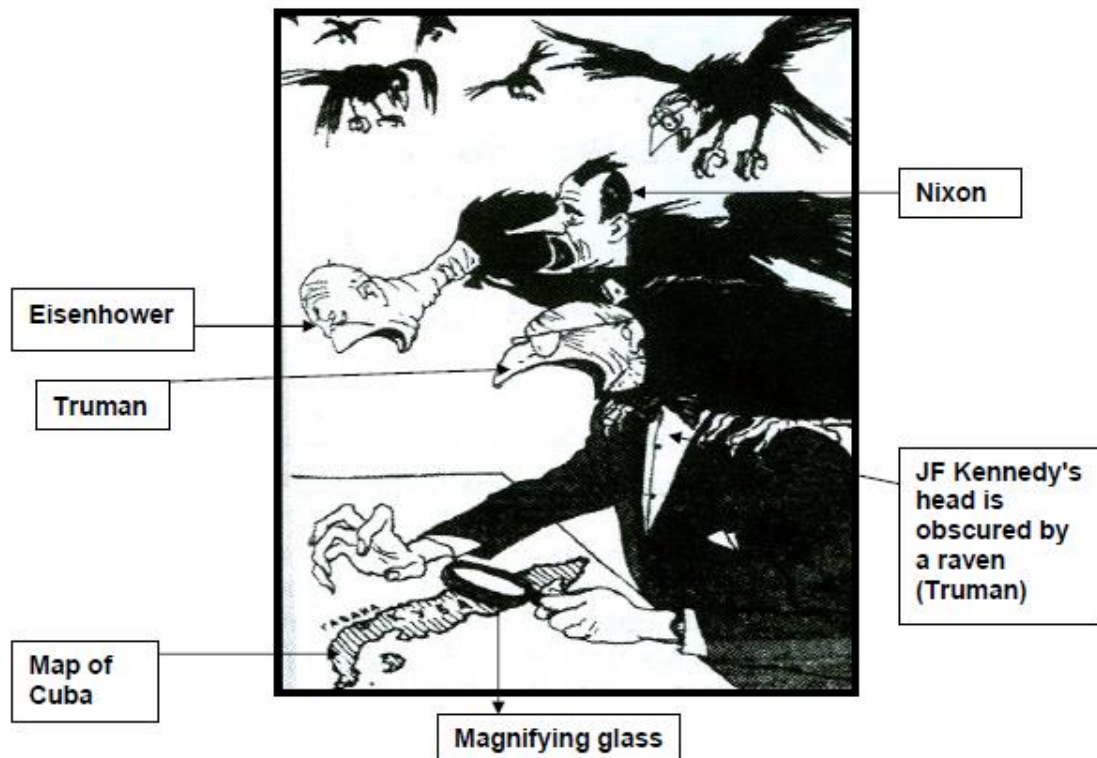
Discussion: The answer to question 1.3.1 cannot simply be extracted from the source. Candidates need to interpret the cartoon, and make inferences as to what it means to portray someone as a raven. Ravens are generally seen as predatory birds that are quite aggressive. The cartoonist is drawing an analogy between ravens and the America leaders. He is suggesting that the leaders are aggressive and bullying towards Cuba. The response requires an explanation and an interpretation of the meaning of the cartoon.

Memorandum/Marking guidelines
 	
1.3.1
   • America depicted as aggressive/ wanted war/ bully/ preying on smaller innocent countries;
   • Taking advantage of Cuba because of its proximity;
   • Cuba is defenceless;
   • Cuba cannot stand up to the might of America; and
   • Any other relevant response (any 1x2) (2)

Example 2:
Question: DBE History P1, 2012 Question1: How did the USA and USSR contribute to the Cold War tensions in Cuba? 1.2.2 How did *The New York Times* portray President Kennedy? (2x2) (4) *Source 1B* **Headline from the New York Times, October 23rd 1962** U.S. IMPOSES ARMS BLOCKADE ON CUBA ON FINDING OFFENSIVE-MISSILE SITES; KENNEDY READY FOR SOVIET SHOWDOWN.
Discussion: To answer Question 1.2.2 candidates, need to interpret the meaning of the headline. It is not enough to simply repeat the information. Candidates need to understand the headline, and make inferences from it: that Kennedy is portrayed as a man of action, a man who is not afraid to face up to the USSR.

Memorandum/Marking guidelines
 	
1.2.2
   • Kennedy was ready for a war with the Soviet Union
   • Kennedy was a forceful leader
   • Kennedy was prepared to defend the USA against the Soviet Union
   • Any other relevant response (any 2 x 2) (4)

Example 3:
Question: IEB History P1 2014 Question 2

This photograph, taken on 24 May 1975, shows an American diplomat punching a South Vietnamese man who is trying to board a helicopter that is attempting to fly out of Saigon with workers from the American embassy. The photographer is unknown.

[<http://www.nytimes.com/learning/general/specials/saigon/110599saigon-pix.7.html, accessed 16 January 2014>]

An American reporter in Saigon at the time reported that 'there were desperate scenes of mass panic as the South Vietnamese tried to flee the advancing North Vietnamese' (The Castle Main Independent, 24 May 1975).

2.1.2 Refer to ONE visual clue in this photograph that supports this reporter's version of the event on the day. (2)

Discussion:

This question requires learners to analyse the photograph (source) to find one visual clue (evidence) which supports the reporter's claim that the scenes were of 'mass panic'. The memo states that they could use the following clues:
South Vietnamese clutching at the door; large masses running at the helicopter (FLEE); facial features; hanging onto helicopter door (DESPERATE); no one is boarding in an orderly way, a mad rush to get on board (CHAOS); facial features, of the South Vietnamese, the soldier and the diplomat's face (PANIC).

Memorandum/Marking guidelines

2.1.2

Flee – South Vietnamese are clutching at door; large masses running at the helicopter
Chaos – no one is boarding the helicopter in an orderly way. Is seems like a mad rush to get on board.

Panic – facial features of the South Vietnamese but also the soldier stationed at the helicopter to push back the masses. The American diplomat's face is also one of panic and fear.

Table 4: Examples of questions at Level 3

- Interpret and evaluate evidence from sources
- Engage with sources to determine their usefulness, bias, reliability and limitations
- Compare and contrast interpretations and perspectives presented in sources; draw independent conclusions.

Example 1:
DBE History P1, 2011: Question 2: How did Julius Nyerere's policy of Ujamaa transform Tanzania into a Socialist state during the 1960s and the 1970s? 2.4 Compare Sources A and C. Explain the usefulness of both these sources to a historian researching the policy of *Ujamaa*. (3x2) (6) *Source 2A* **Taken from History of Africa by K. Shillington.** *Nyerere's vision of a future Tanzania was of a prosperous, self-reliant and classless society. He called it 'African socialism'. … Tanzanian socialism was to be based on local resources rather than imported, high-technology industrialisation. The country's main banks and foreign-owned capitalist companies were to be 'nationalised', that is, taken over by the state on behalf of the people. A 'Leadership Code' banned political leaders from accumulating private wealth. The main emphasis of government was o rural development, leading to self-reliance.* *Source 2C* **The poster below explains the policy of Ujamaa. It was done by Tanzanian artist D. Mwanbele.** *WHAT IS UJAMAA?* ***U****JAMAA MEANS FAMILY TREE OR TREE OF LIFE AND SHOWS HOW* ***J****OINTLY DIFFERENT MEMBERS OF THE MAKONDE TRIBE SURVIVE AND SHOW DIFFERENT* ***A****SPECTS OF WAYS OF LIFE AMONSGST THE TRIKE* ***M****AKONDE TRIEBE THE WORLD FAMOUS CARVES UJAMAA FROM ONE PIECE OF EBONY WOOD* ***A****RT THIS FORM OF ART IS PASSED FROM ONE GENERATION TO ANOTHERE AND* ***A****PPRECIATED BOTH LOCALLY AND INTERNATIONALLY.*
Discussion: To answer Question 2.4, candidates are required to compare not only the content of two sources, but to evaluate the ways in which the sources would be useful for a historian researching the policy of *Ujamaa*. This means they need to understand that

the first source is a secondary source, written by an academic, and the second is a primary source, produced by a Tanzanian artist, which affects the reliability and bias of the sources. (However, this is, in fact, not mentioned in the official memorandum). Candidates need to recognise that the two sources provide different kinds of information, and explain why this is the case.

Memorandum/Marking guidelines

2.4 Candidates must use Sources 2A and 2C and explain its usefulness
- Both sources explain the concept of Ujamaa;
- Both sources focus on how Ujamaa was implemented;
- Both sources focus on how and why Ujamaa was good for Tanzania;
- Both sources add to a historian's understanding of Ujamaa;
- Any other relevant response (any 3 x 2) (6).

Example 2:

Question:

DBE History P1, 2014

Question 1: How did the Berlin Blockade contribute to Cold War tensions between the Western powers and the Soviet Union?

1.5 Refer to Sources 1B and 1D. Explain how the information in Source 1D gives a different perspective to Source 1B regarding the assistance that Berlin received in 1948. (2x2)

Source 1 B
The extract below focuses on the assistance (supplies) that the Western powers provided to West Berliners in 1948.

Between 24 June 1948 and 30 September 1949 British and American soldiers made about 400 000 flights into West Berlin, hauling (carrying) almost two million tons of food, coal, clothes and other necessities. During the busiest days, a plane landed every 45 seconds at one of the three airports in West Berlin. Pilots even used the rivers as runways to bring in their essential cargo. Berlin's Havel River was the landing site for amphibious aircraft (airplanes which can land on water) participating in the airlift.

However, even with the supplies donated by Western nations, blockaded Berliners did not have an easy year. Fuel was in such short supply that power plants could supply electricity for only a few hours each day. Food rations consisted mainly of dehydrated (dried) potatoes and fresh foods were not available at all. In the winter, the sun set before four o'clock. The people of West Berlin huddled (gathered together) in their cold, dark homes without heat, light or a warm meal to cheer them.

Nevertheless, West Berliners were determined not to give in to Soviet pressure. They refused to accept food from the communist government of East Berlin.

[From: *A History of the United States, Volume II: 1865 to the Present – American Voices* by S Foresman].

Source 1 D
This is an extract from a speech by Otto Grotewohl, Chairman of the United Socialist Party in East Germany, which was delivered on 1 November 1948.

It is well-known that the Soviet Union has provided 100 000 tons of grain, over 10 000 tons of fats, heating materials and other commodities for Berlin. Fresh meat, fish, eggs, potatoes and other products are being imported from countries of the people's democracies (Soviet-controlled Eastern Europe). This means that supplies are secured for the entire population of Berlin.

The fact that this opportunity is not being exploited is primarily a consequence of the malicious (nasty) political campaign being pursued by the reactionary (strongly opposed) British and American groups. The Western occupation authorities are preventing the residents of their sectors from taking advantage of the opportunities to acquire supplies offered by the Soviet sector. What is more, the behaviour of the Berlin City Administration is downright criminal in that it is doing its very best to further aggravate the situation. The resistance of the Berlin city council, which is a slave to the Western occupation authorities, has resulted in the people living in the Western sectors being robbed of the opportunity to obtain supplies of food and other commodities provided directly in the shops in the Western sectors by the Soviet Union. The 'Airlift' invented by the Western occupation powers is an absolutely superfluous (unnecessary) and purely demagogic (inciting) measure which can in no way supply Berlin and what is more, is burdening the German people with considerable costs …

Today, the imperialist forces of the Western powers are in alliance with the rising reactionary (backward looking) forces in Germany. They are stirring up the Germans against the Soviet Union, unleashing (releasing) the desire for war and the thirst for revenge …

[From: http://www.cvce.eu Accessed on 27 August 2013].

Discussion:

The question requires candidates to compare and contrast interpretations and perspectives of the two sources. Candidates will need to show that the two sources provide very different perspectives about Berlin in 1984. The first source emphasises that US and British soldiers made 400 000 flights to Berlin carrying two million tons of supplies. This is from a secondary source about American history, so the focus would be on the good done by US troops. The second source is from a speech which focuses on the supplies provided by the Soviets. This speech is by a party official of the United Socialist party in East Berlin, thus it would be biased toward the Soviets.

Memorandum/Marking guidelines

1.5
- Source 1D is a Soviet perspective which indicates the provision of supplies (e.g. grain, meat) that the Soviet Union made to Berlin in 1948.
- Source 1B is a Western perspective which refers to the supplies (e.g. fuel, food) that the Western nations made to Berlin in 1948.
- Any other relevant response (any 2 x 2) (4)

Example 3:
Question: <u>DBE History P1, 2012</u> Question 1: How did the USA and the USSR contribute to the Cold War tensions in Cuba? 1.3.4 After reading both Viewpoint 1 and 2, explain which one of the two leaders you think was responsible for the crisis in Cuba. (2x2). ***Source 1 C*** **The source consists of letters written by President Khrushchev and President Kennedy on their involvement in the Cuban Missile Crisis.** ***Viewpoint 1: Part of a letter that was written by President Khrushchev to President Kennedy on 24 October 1962.*** *You Mr. President, are not declaring quarantine, but rather are setting forth an ultimatum and threatening that if we do not give in to your demands you will use force …. No, Mr. President, I cannot agree to this, and I think that in your own heart, you recognise that I am correct. I am convinced that in my place, you would act the same way.* *Therefore, the Soviet Government cannot instruct the captains of Soviet vessels bound for Cuba to observe the orders of American naval forces blockading that island. Naturally we will not simply be bystanders with regard to piratical (robbing) acts by American ships on the high seas. We will then be forced on our part to take the measures we consider necessary and adequate in order to protect our rights. We have everything necessary to do so.* ***Viewpoint 2. Part of a letter in which President Kennedy responds to President Khrushchev, written on 25 October 1962. In this letter, Kennedy states that the crisis was due to Soviet interference in Cuba.*** *In early September, I indicated plainly that the United States would regard any shipment of offensive weapons as presenting the gravest issues. After that time, this Government received the most explicit (clear) assurances (guarantees) from your Government and its representatives … that no offensive weapons were being sent to Cuba.* *I ask you to recognise clearly, Mr. Chairman, that it was not I who issued the first challenge in this case, and that in the light of these records these activities in Cuba required the responses I have announced.*
Discussion: Question 1.3.4 requires candidates to evaluate the perspectives in the two sources, and to make a judgement and draw a conclusion as to whom they believe was responsible for the crisis in Cuba. They are required to do more than extract information (L1) and more than interpret (L2) what the source means.
Memorandum/Marking guidelines 1.3.4

> **Candidates can select either KHRUSHCHEV or KENNEDY and support their answer with relevant evidence.**
>
> KENNEDY
> - President Kennedy's actions were tantamount to war
> - President Kennedy declared a quarantine
> - Was only responding to the threat of Russian influence in Cuba
> - Impose a quarantine of Soviet ships
> - Used unconventional methods to extend the Cold War
> - Any other relevant response
>
> KHRUSHCHEV
> - President Khrushchev was responsible for building of missile bases
> - Assurance given by the Russian government proved fruitless
> - Tried to use Cuba to spread communist influence in Cuba and the Caribbean
> - Tried to increase Russian influence in Cuba
> - Any other relevant response
> (Any 2 x 2) (4)

To accomplish the goal of discriminating between high achievers, those performing very poorly, and all candidates in between; examiners need to vary the challenge of examination questions. Until recently, the assumption has been that 'alignment' with the allocated percentage of marks for questions at the required cognitive demand levels meant that sufficient examination questions were relatively easy; moderately challenging; and difficult for candidates to answer.

However, research and candidate performance both indicate that a range of factors, other than type of cognitive demand contribute to the cognitive challenge of question. Such factors include the level of content knowledge required, the language used in the question, and the complexity or number of concepts tested. In other words, cognitive demand levels on their own do not necessarily distinguish between degrees of difficulty of questions.

This research helps, to some extent, explain why, despite that some NSC examination papers have complied with the specified cognitive demand weightings stipulated in the policy, they have not adequately distinguished

between candidates with a range of academic abilities in particular between higher ability candidates. As a result, examiners, moderators and evaluators are now required to assess the difficulty of level of each examination question in addition to judging its cognitive demand.

Section 7 explains the new protocol introduced by Umalusi for analysing examination question difficulty.

7   ANALYSING THE LEVEL OF DIFFICULTY OF EXAMINATION QUESTIONS

When analysing the level of difficulty of each examination question, there are six important protocols to note. These are:

1. Question difficulty is **assessed independently** of the type and level **of cognitive demand**.
2. Question difficulty is assessed against **four levels of difficulty**.
3. Question difficulty is determined against the assumed capabilities of the **envisaged** Grade 12 History NSC examination **candidate**.
4. Question difficulty is determined using **a common framework** for thinking about question difficulty.
5. Question difficulty entails **distinguishing unintended sources of difficulty** or ease **from intended sources of difficulty** or ease.
6. Question difficulty entails identifying **differences** in levels of difficulty **within a single question**.

Each of the above protocols is individually explained and discussed below.

7.1   Question difficulty is assessed independently of the type and level of cognitive demand

As emphasised earlier in this exemplar book, the revised Umalusi NSC examination evaluation instruments separate the analysis of the type of cognitive demand of a question from the analysis of the level of difficulty of each examination question. Cognitive demand describes the *type of cognitive process* that is required to answer a question, and this does not necessarily equate or align with the *level of difficulty* of other aspects of a question, such

as the difficulty of the content knowledge that is being assessed. For example, a recall question can ask a candidate to recall very complex and abstract scientific content. The question would be categorised as Level 1 in terms of the cognitive demand taxonomy but may be rated as 'difficult' (Level 3 Table 5 below).

7.2 Question difficulty is assessed at four levels of difficulty

> *Note:*
>
> Cognitive demand is just one of the features of a question that can influence your comparative judgments of question difficulty. The type and level of cognitive process involved in answering a question does not necessarily determine how difficult the question would be for candidates. Not all evaluation/synthesis /analysis questions are more difficult than questions involving lower-order processes such as comprehension or application.

The revised Umalusi NSC examination evaluation instruments require evaluators to exercise expert judgments about whether each examination question is 'Easy', 'Moderately challenging', 'Difficult' or 'Very difficult' for the envisaged Grade 12 learner to answer. Descriptions of these categories of difficulty are shown in Table 9.

TABLE 5:   LEVELS OF DIFFICULTY OF EXAMINATION QUESTIONS

1	2	3	4
Easy for the envisaged Grade 12 student to answer.	**Moderately challenging** for the envisaged Grade 12 student to answer.	**Difficult** for the envisaged Grade 12 student to answer.	**Very difficult** for the envisaged Grade 12 student to answer. The skills and knowledge required to answer the question allow for the top students (*extremely* high-achieving/ability students) to be discriminated from other high achieving/ability students).

> **Note:**
> The fourth level, 'very difficult' has been included in the levels of difficulty of examination questions to ensure that there are sufficient questions that discriminate well amongst higher ability candidates.

7.3 Question difficulty is determined against the assumed capabilities of the envisaged Grade 12 History NSC examination candidate

The revised Umalusi NSC examination evaluation instruments require evaluators to exercise expert judgments about whether each examination question is 'Easy', 'Moderately challenging', 'Difficult' or 'Very difficult' for the '**envisaged**' Grade 12 learner to answer (Table 9). In other words, assessment of question difficulty is linked to a particular target student within the population of NSC candidates, that is, the Grade 12 candidate of average intelligence or ability.

The Grade 12 learners that you may have taught over the course of your career cannot be used as a benchmark of the 'envisaged' candidate as we cannot know whether their abilities fall too high, or too low on the entire spectrum of all Grade 12 History candidates in South Africa. The revised Umalusi NSC examination evaluation instruments thus emphasise that, when rating the level of the difficulty of a particular question, your conception of the '**envisaged**' candidate needs to be representative of the entire population of candidates for all schools in the country, in other words, of the overall Grade 12 population.

Most importantly, the conception of this 'envisaged' candidate is a learner who has been taught the whole curriculum adequately by a teacher who is qualified to teach the subject, in a functioning school. There are many disparities in the South African education system that can lead to very large differences in the implementation of the curriculum. Thus this 'envisaged' learner is not a typical South African Grade 12 learner – it is an intellectual construct (an imagined person) whom you need to imagine when judging the level of difficulty of a question. This envisaged Grade 12 learner is an

aspirational ideal of where we would like all History learners in South Africa to be.

> **Note:**
>
> The concept of the **envisaged Grade 12 candidate is** that of an imaginary learner who has the following features:
>   a. Is of average intelligence or ability
>   b. Has been taught by a competent teacher
>   c. Has been exposed to the entire examinable curriculum
> This envisaged learner represents an imaginary person who occupies the middle ground of ability and approaches questions *having had all the necessary schooling.*

7.4 Question difficulty is determined using a common framework for thinking about question difficulty

Examiners, moderators and evaluators **in all subjects** are now provided with a common framework for thinking about question difficulty to use when identifying sources of difficulty or ease in each question, and to provide their reasons for the level of difficulty they select for each examination question.

The framework described in detail below provides the main sources of difficulty or 'ease' inherent in questions. The four sources of difficulty which must be considered when thinking about the level of difficulty of examination questions in this framework are as follows.

1. '**Content difficulty**' refers to the difficulty inherent in the subject matter and/or concept/s assessed.
2. '**Stimulus difficulty**' refers to the difficulty that candidates confront when they attempt to read and understand the question and its source material. The demands of the reading required to answer a question thus form an important element of 'stimulus difficulty'.
3. '**Task difficulty**' refers to the difficulty that candidates confront when they try to formulate or produce an answer. The level of cognitive demand of a question forms an element of 'Task difficulty', as does the demand of the written text or representations that learners are required to produce for their response.
4. **'Expected response difficulty'** refers to difficulty imposed by examiners in a marking guideline, scoring rubric or memorandum. For example, mark

allocations affect the amount and level of answers students are expected to write.

This framework derived from Leong (2006) was chosen because it allows the person making judgments about question difficulty to grapple with nuances and with making connections. The underlying assumption is that judgment of question difficulty is influenced by the interaction and overlap of different aspects of the four main sources of difficulty. Whilst one of the above four sources of difficulty may be more pronounced in a specific question, the other three sources may also be evident. Furthermore, not all four sources of difficulty need to be present for a question to be rated as difficult.

The four-category conceptual framework is part of the required Umalusi examination evaluation instruments. Each category or source of difficulty in this framework is described and explained in detail below (Table 6). Please read the entire table very carefully.

TABLE 6:   FRAMEWORK FOR THINKING ABOUT QUESTION DIFFICULTY

CONTENT/CONCEPT DIFFICULTY
Content/concept difficulty indexes the difficulty in the **subject matter, topic or conceptual knowledge** assessed or required. In this judgment of the item/question, difficulty exists in the **academic and conceptual demands** that questions make and/or the **grade level** boundaries of the various 'elements' of domain/subject knowledge (topics, facts, concepts, principles and procedures associated with the subject).
For example:
Questions that assess '**advanced content'**, that is, subject knowledge that is considered to be in advance of the grade level curriculum, are *likely* to be difficult or very difficult for most candidates. Questions that assess subject knowledge which forms part of the core curriculum for the grade are *likely* to be moderately difficult for most candidates. Questions that assess **'basic content'** or subject knowledge candidates would have learnt at lower grade levels, and which would be familiar to them are *unlikely* to pose too much of a challenge to most candidates. Questions that require general everyday knowledge or knowledge of 'real life' experiences are *often* easier than those that test more **specialized** school **knowledge**. Questions involving only concrete objects, phenomena, or processes

are *usually* easier than those that involve more **abstract constructs, ideas, processes or modes.**

Questions which test learners' understanding of theoretical or **de-contextualised issues or topics**, rather than their knowledge of specific examples or contextualised topics or issues *tend* to be more difficult. Questions involving familiar, contemporary/current contexts or events are *usually* easier than those that are more **abstract or** involve **'imagined' events** (e.g. past/future events) or **contexts** that are **distant from learners' experiences.**

Content difficulty may also be varied by changing **the number of knowledge elements or operations assessed**. *Generally,* the difficulty of a question increases with the number of knowledge elements or operations assessed. Questions that assess learners on two or more knowledge elements or operations are *usually* (but not always) more difficult than those that assess a single knowledge element or operation.

Assessing learners on **a combination of knowledge elements or operations that are seldom combined** *usually* increases the level of difficulty.

EXAMPLES OF INVALID OR UNINTENDED SOURCE OF CONTENT DIFFICULTY

- Testing obscure or unimportant concepts or facts that are not mentioned in the curriculum, or which are unimportant to the curriculum learning objectives.
- Testing very advanced concepts or operation that candidates are extremely unlikely to have had opportunities to learn.

STIMULUS DIFFICULTY
Stimulus difficulty refers to the difficulty of the linguistic **features of the question** (**linguistic** complexity) and the challenge that candidates face when they attempt to read, interpret and understand the words and phrases in the question AND when they attempt to read and understand the **information or 'text' or source material (diagrams, tables and graphs, pictures, cartoons, passages, etc.) that accompanies the question.**

For example:

Questions that contain words and phrases that require only simple and straightforward comprehension are *usually* easier than those that require the candidate to understand **subject specific phraseology and terminology** (e.g. idiomatic or grammatical language not usually encountered in everyday language), or that require more technical comprehension and specialised command of words and language (e.g. everyday words involving different meanings within the context of the subject).

Questions that contain information that is 'tailored' to an expected response, that is, questions that contain no irrelevant or distracting information, are *generally* easier than those than require candidates to select relevant and appropriate information or **unpack a large amount of information** for their response. A question **set in a very**

rich context *can* increase question difficulty. For example, learners *may* find it difficult to select the correct operation when, for example, a mathematics or accountancy question is set in a context-rich context.

Although the level of difficulty in examinations is *usually* revealed most clearly through the questions, text complexity or the degree of **challenge or complexity in written or graphic texts** (such as a graph, table, picture, cartoon, etc.) that learners are required to read and interpret in order to respond *can* increase the level of difficulty. Questions that depend on reading and selecting content from a text *can* be more challenging than questions that do not **depend on actually reading the accompanying text** because they test reading comprehension skills as well as subject knowledge. Questions that require candidates to **read a lot** *can* be more challenging than those that require limited reading. Questions that tell learners where in the text to look for relevant information are *usually* easier that those where **learners are not told where to look**.

The level of difficulty *may* increase if texts set, and reading passages or other **source material** used are challenging for the grade level, and make **high reading demands** on learners at the grade level. Predictors of textual difficulty include

- **semantic content** - for example, if vocabulary and words used are typically outside the reading vocabulary of Grade 12 learners, 'texts' (passage, cartoon, diagram, table, etc.) are *usually* more difficult. 'Texts' are *generally* easier if words or images are made accessible by using semantic/context, syntactic/structural or graphophonic/visual cues.
- **syntactic or organisational structure** - for example, sentence structure and length. For example, if learners are likely to be *familiar with the structure* of the 'text' or resource, for example, from reading newspapers or magazines, etc. 'texts' are *usually* easier than when the structure is unfamiliar.
- **literary techniques** - for example, abstractness of ideas and imagery - and **background knowledge required**, for example, to make sense of allusions.
- if the **context** is **unfamiliar** or remote, or if candidates do not have or are **not provided with access to the context** which informs a text (source material, passage, diagram, table, etc.) they are expected to read, and which informs the question they are supposed to answer and the answer they are expected to write, then constructing a response is *likely* to be more difficult than when the context is provided or familiar.

Questions which require learners to **cross-reference different sources** are *usually* more difficult than those which deal with one source at a time.

Another factor in stimulus difficulty is presentation and visual appearance. For example, type face and size, use of headings, and other types of textual organisers etc. can aid **'readability'** and make it easier for learners to interpret the meaning of a question.

EXAMPLES OF INVALID OR UNINTENDED SOURCES OF STIMULUS DIFFICULTY

- Meaning of words unclear or unknown.
- Difficult or impossible to work out what the question is asking.
- Questions which are ambiguous.
- Grammatical errors in the question that could cause misunderstanding.
- Inaccuracy or inconsistency of information or data given.
- Insufficient information provided.
- Unclear resource (badly drawn or printed diagram, inappropriate graph, unconventional table).
- Dense presentation (too many important points packed in a certain part of the stimulus).

TASK DIFFICULTY

Task difficulty refers to the **difficulty that candidates confront when they try to formulate or produce an answer**.

For example:

In most questions, to generate a response, candidates have to work through the steps of a solution. *Generally*, questions that **require more steps in a solution** are more difficult than those that require fewer steps. Questions involving only one or two steps in the solution are *generally* easier than those where several operations required for a solution**.**

Task difficulty may also be mediated by the **amount of guidance present in the question**. Although question format is not necessarily a factor and difficult questions can have a short or simple format, questions that provide guided steps or cues (e.g. a clear and detailed framework for answering) are *generally* easier than those that are more open ended and require candidates to form or tailor their **own response strategy** or argument, work out the steps **and maintain the strategy for answering** the question by themselves. A high degree of prompting (a high degree of prompted recall, for example) *tends* to reduce difficulty level.

Questions that test specific knowledge are *usually* less difficult that **multi-step, multiple-concept or operation questions**.

A question that requires the candidate to **use** a **high level of** appropriate **subject specific, scientific or specialised terminology** in their **response** *tends* to be more difficult than one which does not.

A question requiring candidates to **create a complex abstract (symbolic or graphic) representation** is *usually* more challenging than a question requiring candidates to create a concrete representation.

A question requiring writing a one-word answer, a phrase, or a simple sentence is *often* easier to write than **responses that require more complex sentences, a paragraph or a full essay or composition**.

Narrative or descriptive writing, for example where the focus is on recounting or ordering a sequence of events chronologically, is *usually* easier than **writing discursively** (**argumentatively or analytically**) where ideas need to be developed

and ordered logically. Some questions reflect task difficulty simply by **'creating the space' for A-grade candidates** to demonstrate genuine insight, original thought or good argumentation, and to write succinctly and coherently about their knowledge.

Another element is the **complexity in structure of the required response**. When simple connections between ideas or operations are expected in a response, the question is *generally* easier to answer than a question in which the significance of the relations between the parts and the whole is expected to be discussed in a response. In other words, a question in which an unstructured response is expected is *generally* easier than a question in which **a relational response** is required. A response which involves **combining or linking a number of complex ideas or operations** is *usually* more difficult than a response where there is no need to combine or link ideas or operations.

On the other hand, questions which require continuous prose or extended writing *may* also be easier to answer correctly or to get marks for than questions that require no writing at all or single letter answer (such as multiple choice), or a brief response of one or two words or short phrase/s because they **test very specific knowledge**.

The **cognitive demand** or **thinking processes** required form an aspect of task difficulty. Some questions test thinking ability, and learners' capacity to deal with ideas, etc. Questions that assess inferential comprehension or application of knowledge, or that require learners to take ideas from one context and use it in another, for example, *tend* to be more difficult than questions that assess recognition or retrieval of basic information. On the other hand, questions requiring recall of knowledge are *usually* more difficult than questions that require simple recognition processes.

When the **resources for answering** the question are included in the examination paper, then the task is *usually* easier than when candidates have to **use and select their own internal resources** (for example, their own knowledge of the subject) or transform information to answer the question.

Questions that require learners to take or **transfer** ideas, **skills or knowledge from one context/subject area and use them in another** *tend* to be more difficult.

EXAMPLES OF INVALID OR UNINTENDED SOURCES OF TASK DIFFICULTY

- Level of detail required in an answer is unclear.
- Context is unrelated to or uncharacteristic of the task than candidates have to do.
- Details of a context distract candidates from recalling or using the right bits of their knowledge.
- Question is unanswerable.
- Illogical order or sequence of parts of the questions.
- Interference from a previous question.
- Insufficient space (or time) allocated for responding.
- Question predictability or task familiarity. If the same question regularly appears in examination papers or has been provided to schools as exemplars, learners are likely to have had prior exposure, and practised and rehearsed answers in class (for example, when the same language set works are prescribed each year).

• Questions which involve potential follow-on errors from answers to previous questions.

EXPECTED RESPONSE DIFFICULTY
Expected response difficulty refers to difficulty imposed by examiners in a **mark scheme and memorandum**. This location of difficulty is more applicable to 'constructed' response questions, as opposed to 'selected' response questions (such as multiple choice, matching/true-false).

For example:
When examiners expect few or no details in a response, the question is *generally* easier than one where the mark scheme implies that **a lot of details are expected**.

A further aspect of expected response difficulty is the clarity of the **allocation of marks**. Questions are *generally* easier when the allocation of marks is explicit, straight-forward or logical (i.e. 3 marks for listing 3 points) than when the **mark allocation is indeterminate or implicit** (e.g. when candidates need all 3 points for one full mark or 20 marks for a discussion of a concept, without any indication of how much and what to write in a response). This aspect affects difficulty because candidates who are unclear about the mark expectations in a response may not produce sufficient amount of answers in their response that will earn the marks that befit their ability.

Some questions are more difficult/easy to mark accurately than others. Questions that are **harder to mark and score objectively** are *generally* more difficult for candidates than questions that require simple marking or scoring strategies on the part of markers. For example, recognition and recall questions are *usually* easier to test and mark objectively because they usually require the use of matching and/or simple scanning strategies on the part of markers. More complex questions requiring analysis (breaking down a passage or material into its component parts), evaluation (making judgments, for example, about the worth of material or text, or about solutions to a problem), synthesis (bringing together parts or elements to form a whole), and creativity (presenting own ideas or original thoughts) are *generally* harder to mark/score objectively. The best way to test for analysis, evaluation, synthesis and creativity is usually through extended writing. Such extended writing *generally* requires the use of more cognitively demanding *marking* strategies such as interpreting and evaluating the logic of what the candidate has written.

Questions where **a wide range of alternative answers or response/s** is possible or where the correct answer may be arrived at through different strategies *tend* to be more difficult. On the other hand, questions may be so open-ended that learners will get marks even if they engage with the task very superficially. |

EXAMPLES OF INVALID OR UNINTENDED SOURCES OF EXPECTED RESPONSE DIFFICULTY
• Mark allocation is unclear or illogical. The weighting of marks is important in questions that comprise more than one component when components vary in levels of difficulty. Learners may be able to get the same marks for

> - answering easy component/s of the item as other learners are awarded for answering the more difficult components.
> - Mark scheme and questions are incongruent. For example, there is no clear correlation between the mark indicated on the question paper and the mark allocation of the memorandum.
> - Question asked is not the one that examiners want candidates to answer. Memorandum spells out expectation to a slightly different question, not the actual question.
> - Impossible for candidate to work out from the question what the answer to the question is (answer is indeterminable).
> - Wrong answer provided in memorandum.
> - Alternative correct answers from those provided or spelt out in the memorandum are also plausible.
> - The question is 'open' but the memo has a closed response. Memo allows no leeway for markers to interpret answers and give credit where due.

The framework described above does not provide you with explicit links between the different sources of difficulty, or show relationships and overlaps between the different categories and concepts in the framework. This is because it is impossible to set prescribed rules or pre-determined combinations of categories and concepts used for making judgments about the source of difficulty in a particular examination question.

The intention behind the framework is to allow you to exercise your sense of judgment as an expert. The complexity of your judgment lies in your ability as an expert to recognise subtle interactions and identify links between different categories of a question's difficulty or ease. For example, a question that tests specific knowledge of your subject can actually be more difficult that a multi-step question because it requires candidates to explain a highly abstract concept, or very complex content. In other words, although questions that test specific knowledge are *usually* less difficult than multiple-concept or operation questions, the level of difficulty of the content knowledge required to answer a question can make the question more difficult than a multi-step or multi-operation question.

Not all one-word response questions can automatically be assumed to be easy. For example, multiple-choice questions are not automatically easy

because a choice of responses is provided – some can be difficult. As an expert in your subject, you need to make these types of judgments about each question.

> ***Note:***
> It is very important that you become extremely familiar with the framework explained in Table 6, and with each category or source of difficulty provided (i.e. content difficulty, task difficulty, stimulus difficulty, and expected response difficulty). You need to understand the examples of questions which illustrate each of the four levels (Table 7 to Table 10). This framework is intended to assist you in discussing and justifying your decisions regarding the difficulty level ratings of questions. You are expected to **refer to all four categories or sources of difficulty** in justifying your decisions.
>
> When considering question difficulty ask:
> - How difficult is the **knowledge** (content, concepts or procedures) that is being assessed for the envisaged Grade 12 candidate? (*Content difficulty*)
> - How difficult is it for the envisaged I Grade 12 candidate to formulate the answer to the question? In considering this source of difficulty, you should **take into account the type of cognitive demand** made by the task. (*Task difficulty*)
> - How difficult is it for the envisaged Grade 12 candidate to **understand the question and the source material** that need to be read to answer the particular question? (*Stimulus difficulty*)
> - What does the **marking memorandum and mark scheme** show about the difficulty of the question? (*Expected response difficulty*)

7.5 Question difficulty entails distinguishing unintended sources of difficulty or ease from intended sources of difficulty or ease

Close inspection of the framework for thinking about question difficulty (Section 7.4, Table 9) above, shows that, for each general category or source of difficulty, the framework makes a distinction between 'valid' or intended, and 'invalid' or unintended sources of question difficulty or ease. Therefore, defining question difficulty entails identifying whether sources of difficulty or ease in a question were intended or unintended by examiners. Included in Table 9 are examples of unintended sources of difficulty or ease for each of the four categories.

Valid difficulty or 'easiness' in a question has its source in the requirements of the question, and is ***intended*** by the examiner (Ahmed and Pollit, 1999). Invalid

sources of difficulty or 'easiness' refer to those features of question difficulty or 'easiness' that were ***not intended*** by the examiner. Such unintended 'mistakes' or omissions in questions can prevent the question from assessing what the examiner intended, and are likely to prevent candidates from demonstrating their true ability or competence, and can result in a question being easier or more difficult than the examiner intended.

For example, grammatical errors in a question that could cause misunderstanding for candidates are unintended sources of question difficulty because the difficulty in answering the question could lie in the faulty formulation of the question, rather than in the intrinsic difficulty of the question itself (for example, because of stimulus difficulty). Candidates "may misunderstand the question and therefore not be able to demonstrate what they know" (Ahmed and Pollit, 1999, p.2). Another example is question predictability (when the same questions regularly appear in examination papers or textbooks) because familiarity can make a question which was intended to be difficult, less challenging for examination candidates.

Detecting unintended sources of difficulty or ease in examinations is largely the task of moderators. Nevertheless, evaluators also need to be vigilant about detecting sources which could influence or alter the intended level of question difficulty that moderators may have overlooked.

> ***Note:***
>
> When judging question difficulty, you should distinguish **unintended sources of question difficulty or ease** from those sources that are intended, thus ensuring that examinations have a valid range of levels of difficulty. The framework for thinking about question difficulty allows you to systematically identify technical and other problems in each question. Examples of problems might be: unclear instructions, poor phrasing of questions, the provision of inaccurate and insufficient information, unclear or confusing visual sources or illustrations, incorrect use of terminology, inaccurate or inadequate answers in the marking memorandum, and question predictability. You should **not** rate a question as difficult/easy if the source of difficulty/ease lies in the 'faultiness' of the question or memorandum. Instead, as moderators and evaluators, you need to alert examiners to unintended sources of difficulty/ease so that they can improve questions and remedy errors or sources of confusion before candidates write the examination.

7.6 Question difficulty entails identifying differences in levels of difficulty within a single question

An examination question can incorporate more than one level of difficulty if it has subsections. It is important that the components of such questions are 'broken down' into to their individual levels of difficulty.

> **Note:**
> Each subsection of a question should be analysed separately so that the percentage of marks allocated at each level of difficulty and the weighting for each level of difficulty can be ascertained as accurately as possible for that question.

8. EXAMPLES OF QUESTIONS AT DIFFERENT LEVELS OF DIFFICULTY

This section provides at least **three** examples of questions from previous History NSC examinations (Table 7 to Table 10) categorised at each of the four levels of difficulty described in Section 7 (Table 6) above. These examples were selected to represent the **best and clearest** examples of each level of difficulty that the History experts could find. The discussion below each example question tries to explain the reasoning behind the judgments made about the categorisation of the question at that particular level of difficulty.

Table 7: EXAMPLES OF QUESTIONS AT DIFFICULTY LEVEL 1 – EASY

Example 1:
Question:
Question DBE History P1, November 2012
Question 4: How did the philosophy of Black Consciousness influence the Soweto Uprising of 1976?
4.1.1 According to the source, what was the fastest growing philosophy among the back South African youth? (1x1)
Source 4A

This extract focuses on the influence that the philosophy of Black Consciousness had on the Soweto Uprising of 1976. It was written by John Kane-Berman who was a member of the SRC at the University of the Witwatersrand.

One of the principle factors explaining the new mood of assertiveness (self-confidence) so evident among black youth in many part of the country is the growth of the Black Consciousness philosophy. This is one of the most important developments in South Africa in recent years …

Discussion:

This question is classified as easy for the envisaged Grade 12 candidate because:

- The answer provided in the marking memo is "Black Consciousness". The answer to the question 4.1.1 is evident in the first sentence of the source. No other historical knowledge is required from candidates (content).
- Candidates simply need to identify and extract the answer directly from this sentence. There is no interpretation of the source necessary (task).
- The phrase in the text 'growth of the Black Consciousness philosophy' is very similar to the wording of the question (stimulus).
- All candidates have to do is write/transcribe the two words. The mark allocation and memo show that one mark is awarded for the correct answer so these aspects are straightforward (expected response).

The question is easy in relation to all four possible sources of difficulty.

Memorandum/Marking guidelines

   i.   Black consciousness (1 x 1) (1)

Example 2:

Question DBE History P1, 2011:

Question 1: How did the Cuban Missile Crisis contribute to Cold War tensions between the USSR and the USA in the 1960s?

1.1.2. Why did Khrushchev choose to assist Cuba? Give TWO reasons. (2x1) (2)

Source 1A

The following source is the viewpoint of N. Khrushchev, President of the USSR, of the Cuban Missile Crisis. (Taken from Khrushchev remembers by S. Talbot.)

We welcomed Castro's victory of course, but at the same time we were quite certain that the invasion was only the beginning and that the Americans would not let Cuba alone … one thought kept hammering away at my brain. What would happen if we lost Cuba? I knew it would be a terrible blow to Marxist-Leninism. It would gravely reduce our stature throughout the world, but especially in Latin America. If Cuba was to fall, other Latin American countries would reject us, claiming that for all our might, the Soviet Union hadn't been able to do anything for Cuba, but make empty protest to the United Nations …

Discussion:

This question is classified as easy for the envisaged Grade 12 candidate because:

- The stimulus material is fairly short and the language is not very difficult. (stimulus)

- The answer is found in Source A (lines 3 – 6) thus minimal background knowledge of the historical context is required to answer the question. (content)
- The relevant information simply has to be extracted from the source material. To answer the question, candidates have to recognise (from the source material) that Khrushchev chose to assist Cuba because the consequences of losing Cuba would be:
  a) 'a terrible blow to Marxist-Leninism'.
  b) it would 'reduce the stature of the USSR'.
  c) 'Latin American countries would reject the USSR' because it had not been able to defend Cuba. Candidates do not have to use their own words to formulate their responses or write a coherent paragraph, they can write two short sentences. (task)
- The memo states that any two of the following responses are acceptable:
  ➢ Wanted to protect Marxist-Leninism in Central America.
  ➢ Wanted to ensure the spread of Communism in Latin America.
  ➢ Prevented the demise of Russian stature throughout the world.
  ➢ Latin America would reject Russia. (communism)
  ➢ Wanted to create a communist sphere of interest in Latin America.
  ➢ Any other relevant response.

One mark is awarded for each reason so the mark allocation and marking is straightforward (expected response).

The question is easy in relation to all four possible sources of difficulty.

Memorandum/Marking guidelines

1.1.2
- Wanted to protect Marxist-Leninism in Central America.
- Wanted to ensure the spread of communism in Latin America.
- Prevented the demise of Russian stature throughout the world.
- Latin America would reject Russia (communism).
- Protect Cuba from American aggression.
- Wanted to create a communist sphere of interest in Latin America.
- Any other relevant response (any 2x1) (2).

Example 3:

Question:

IEB Paper 1, November 2014

Section B

6. Use Source C to answer the following questions.
   6.1 How many political deaths were there in KwaZulu-Natal in 1993? (2)
   6.2 How many political deaths were there in South Africa in 1992? (2)
   6.3 In which year was the total number of political deaths in South Africa at its lowest? (2)
   6.4 In which year was the total number of political deaths in KwaZulu-Natal at its highest? (2)

SOURCE C   A table showing the figures for deaths in political violence in KwaZulu-Natal province alone (Column 1) and the total number of deaths in political violence involving mainly supporters of Inkatha and the ANC for the whole country (Column 2)

YEAR	COLUMN 1: Political Deaths in KwaZulu-Natal province	COLUMN 2: Political Deaths in South Africa
1991	1684	2706
1992	1427	3347
1993	1489	3794
1994	1464	2434

[Welsh, David, *The Rise and Fall of Apartheid*, 2009, page 401]

Discussion:

All four questions are classified as easy for the envisaged Grade 12 candidate because:
- Candidates simply need to read, find and write a figure from the table given (task).
- The table is clearly headed, simple and easy to read with no complex vocabulary or interpretation required (stimulus).
- The mark allocation per answer is straightforward. They are awarded 2 marks for each correct figure extracted from the table. As there is only one correct answer for each question, marking is easy (expected response).
- No background knowledge of the historical context is required to answer the question, the correct answer is easily extracted from the table (content)

The question is easy in relation to all four possible sources of difficulty.

Memorandum/Marking guidelines

6.1 1489 (2)
6.2 3347 (2)
6.3 1994 (2)
6.4 1991 (2)

Table 8: EXAMPLES OF QUESTIONS AT DIFFICULTY LEVEL 2 – MODERATE

Example 1:

Question IEB History P1, 2016 Section A – INDIVIDUAL SOURCE ANALYSIS

This photograph, taken in 1965, shows an American soldier grabbing a Vietcong suspect during the Vietnam War.

[Max Hastings. 2016. *Mail Online*. [ONLINE] Available at: <http://www.dailymail.co.uk> (Accessed 11 January 2016)]

1.5 The Vietnam War is often taught as a great struggle against colonialism in Vietnam. Explain how this photograph could be used to show this Vietnamese view. Your answer should consist of TWO points. (4)

Discussion:

This question is classified as moderately difficult because the envisaged Grade 12 candidate is expected to do three things:

- To gain an understanding and knowledge of the concept of colonialism. However, this concept is taught as part of the background to the Vietnam War.
- Analyse the photograph in the context of both colonialism and the Vietnam War.
- Show how the photograph can be used to justify the Vietnamese view.

This question is moderately difficult in relation to the four possible sources of difficulty.

Memorandum/Marking guidelines

- The Vietcong suspect is shown as being grabbed by the American soldier and this could be interpreted as the struggle against a foreign power/fighting for independence
- The American soldier is shown as the oppressor or foreign power abusing the Vietnamese suspect who is shown as helpless and afraid.
- The image as a whole could symbolise the fight by the Vietnamese people against a much larger, well-armed foreign power shown as the American soldier.
- Vietnam like a puppet/America enslaving Vietnam.
- Racism: Asian Vietnamese caught by white American who oppresses him.

(Any ONE of the above explained points).

[**4 marks awarded to an explanation showing a relationship between the two sides: Vietnamese as oppressed and American as oppressor**]

Example 2:

Question:

DBE History P1, 2011

Question 1: How did the Cuban Missile Crisis contribute to Cold War tensions between the USSR and the USA in the 1960s?

1.3.1 What message does the cartoonist wish to convey by portraying the American leaders as ravens? (1x2) (2)

SOURCE 1C

Below is a Soviet cartoon which shows HS Truman, D Eisenhower and R Nixon as ravens (birds of prey) of war urging JF Kennedy to continue his battle against Cuba. The magnifying glass is used over a map of Cuba. Date unknown.
Taken from *Essential Modern World History* by S Waugh.

Eisenhower

Truman

Nixon

JF Kennedy's head is obscured by a raven (Truman)

Map of Cuba

Magnifying glass
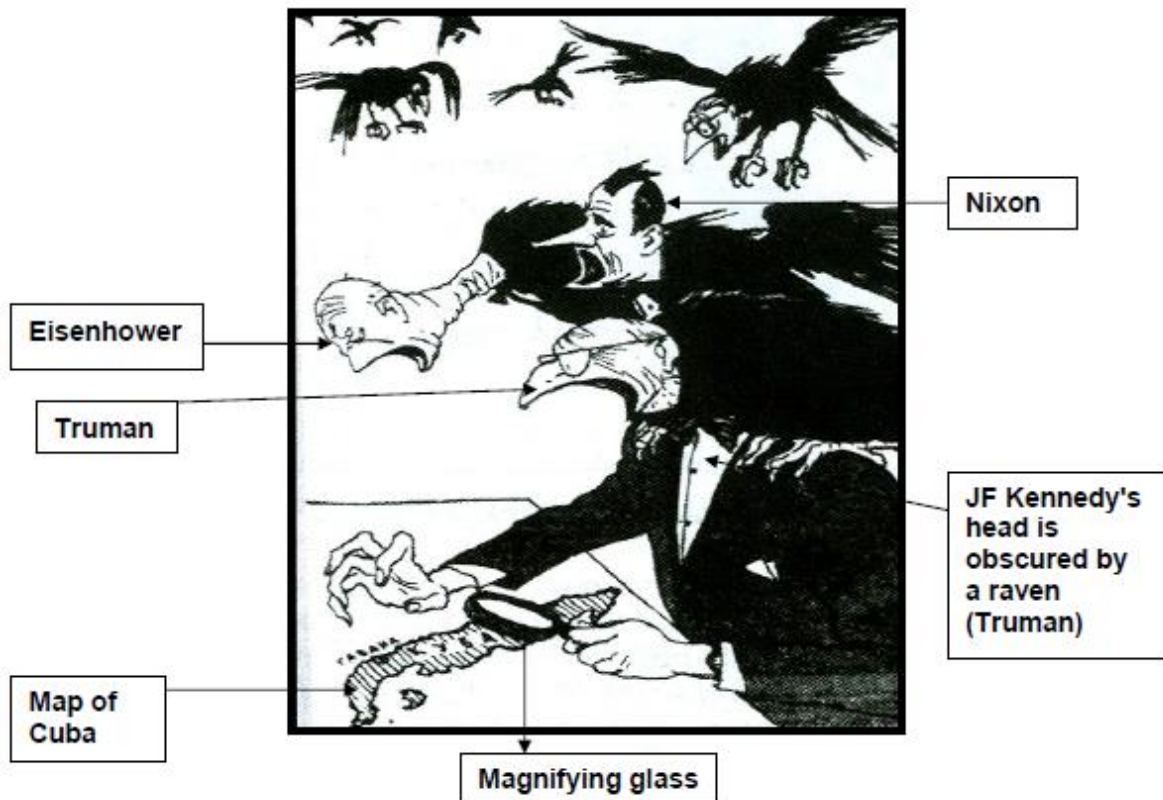
Discussion:

This question is classified as moderately difficult for the envisaged Grade 12 candidate because:

- The caption helps the candidates to understand the meaning of ravens.
- The level of interpretation of the cartoon requires a degree of visual literacy and an understanding of the analogy of why the U.S. presidents are depicted as ravens which the envisaged Grade 12 candidate is likely to find moderately difficult (stimulus).
- The question requires candidates to recognise the analogy between ravens and the American leaders, and to describe and explain how the cartoonist is using the analogy to put his/her message across. They do not have to write extended text, but they do need to use their own words to formulate a response (task).
- Candidates need a degree of background knowledge of Cuban Missile Crisis and Cold War tensions between the USSR and the USA in the 1960 in order to interpret the message. However, this content is not inherently difficult (content).
- According to the memo candidates can provide one of the following responses:

Thus, there are more than two possible answers to the question. However, two marks are allocated for one response which means that, candidates will lose two marks for an incorrect response (expected response).

The question is moderately difficult in relation to three possible sources of difficulty (stimulus, task and expected response).

Memorandum/Marking guidelines

1.3.1
- America depicted as aggressive/ wanted war/ bully/ preying on smaller innocent countries
- Taking advantage of Cuba because of its proximity
- Cuba is defenceless
- Cuba cannot stand up to the might of America
- Any other relevant response (any 1x2) (2)

Example 3:

Question DBE History P1, 2014:

Question 3. What role did the United States government play in the desegregation of Central High School in Little Rock, Arkansas, in 1957?

3.3 Consult Source 3 C.

3.3.4 Why did President Eisenhower believe that the situation in Little Rock, Arkansas, threatened the USA's 'prestige' and 'influence' in the world?

(2x2) (4)

Source 3C

This is an extract from President Eisenhower's media press conference, held on 24 September 1957. He announced his decision to send United States federal troops to Little Rock, Arkansas.

Good evening, my fellow citizens: For a few minutes, this evening, I want to speak to you about the serious situation that has arisen in Little Rock …. This morning the mob again gathered in front of the Central High School of Little Rock, obviously for the purpose of again preventing the carrying out of the court order relating to the admission of Negro children to that school ….

In accordance with that responsibility, I have today issued an executive order directing the use of troops under federal authority, to aid in the execution (carrying out) of federal law at Little Rock, Arkansas ….

Mob rule cannot be allowed to override the decisions of our courts …
A foundation of our American way of life is our national respect for law …

In the South, as elsewhere, citizens are keenly aware of the tremendous disservice (harm) that has been done to the people of Arkansas in the eyes of the nation, and that has been done to the nation in the eyes of the world.

At a time when we face grave (serious) situations abroad because of the hatred that communism bears toward a system of government based on human rights, it would be difficult to exaggerate (overemphasise) the harm that is being done to the status and influence, and indeed to the safety of our nation and the world.

Our enemies are gloating (rejoicing) over this incident and are using it everywhere to misrepresent our whole nation. We are portrayed as a violator (destroyer) of those standards of conduct which the peoples of the world united to proclaim in the Charter of the United Nations. There they affirmed (confirmed) 'faith in fundamental human rights' and 'in the dignity and worth of the human person' and they did so 'without distinction as to race, sex, language or religion'.

And so, with deep confidence, I call upon the citizens of the State of Arkansas to assist in bringing to an immediate end all interference with the law and its processes.

[From: http:historymatters.gmu.edu/d/6335/. Accessed on 30 September 2013].

Discussion:

Question 3.3.4 is classified as moderately difficult for the envisaged Grade 12 candidate because:

- As per question 3.3.3, the source text for this question is lengthy and complex, and contains many terms that are likely to be unfamiliar to Grade 12 learners (stimulus).
- Unlike question 3.3.3, the task in this question is to interpret evidence rather than extract it. The answers are not taken directly from the source and candidates cannot simply reproduce the words from the given text. They need to interpret and infer the evidence from the text and use their own words to write their answers (task).
- 4 marks are allocated for the question without a clear indication in the question of how much information to provide. However, according to the memo, candidates are expected to provide two answers that are each allocated 2 marks (any 2x2) (4). Candidates do not need to write a lengthy response but they do need to make *at least* two clear points to attain the marks allocated. Question 3.3.4 does not specify how many points candidates need to make; they could provide too little information in their response to get full marks (expected response).
- Candidates need to have fair background knowledge of desegregation in the U.S. or of Central High School in Little Rock, Arkansas, in 1957 i.e. of the historical context to understand/make sense of the text. However, this is not advanced or inherently difficult content. (content).

Question 3.3.4 is thus classified as moderately difficult with respect to all of the four possible sources of difficulty.

Memorandum/Marking guidelines
- The actions in Little Rock spread a negative image of Arkansas to the country and the rest of the world.
- The prestige of the USA was being threatened by the actions in Little Rock.
- The situation in Little Rock became a national (not just state) concern because it impacted on the USA prestige and influence.
- Little Rock had become a federal issue which affected the whole of the USA because it was seen as a violation of the UNO's Charter on human rights.
- A federal law was disregarded at state level, so it was necessary for federal government to intervene to enforce the law.
- Any other relevant response. (any 2 x 2) (4)

Table 9: EXAMPLES OF QUESTIONS AT DIFFICULTY LEVEL 3 – DIFFICULT

A note about source-based essays/ extended writing. Many Grade 12 students find the task of synthesising the main points from a range of sources into a coherent argument a difficult or very difficult task. In noting that the two exemplars under the 'very difficult' category are both source-based essays, the claim is that achieving a top mark in such an essay (80 – 100%) would be very difficult for the envisaged Grade 12 learner. This means that the envisaged learner may well still pass these questions with 40 – 50%.

Example 1:
Question:
IEB History P1, 2014.
Section B. Source based questions:
3. The writer of Source B has made use of many biased words. Write down TWO biased words or phrases and explain his intention in using EACH of these biased words. (6)
SOURCE B   **An extract from a book written by the former newspaper editor Allister Sparks shortly after the unbanning of the ANC in 1990**   *It is a unique relationship of two political opposites, sworn enemies for most of their lives, who have become political partners in a quest to end apartheid and lay the foundations for a new South Africa. It is a quest in which each is totally dependent on the other, for neither has a viable fall-back position. De Klerk cannot outlaw*

the ANC again, send Mandela back to prison and revert to apartheid. Having raised internal and international expectations of change, he dare not even stand still; to survive he has to keep moving forward, and he can only move if Mandela moves with him. Likewise, the ANC leader cannot revert to a revolutionary war he now knows he cannot win, especially with the Soviet Union no longer interested in sponsoring it. He, too, must move to survive, and he can only move in tandem* with De Klerk.

[Sparks, Allister, *The Mind of South Africa: The Story of the Rise and Fall of Apartheid*, 1990, page 406]

*in tandem= together

Discussion:

This question is classified as very difficult for the envisaged Grade 12 candidate because:
- The source is a secondary source which is short, but which has some difficult words making it moderately difficult for the envisaged Grade 12 to interpret (stimulus).
- The task requires learners to identify biased words or phrases in the text and also providing an explanation of the author's intention which requires a close reading and a nuanced understanding and interpretation of the text (task). Two of the three marks are awarded for the explanation.
- Three marks are allocated for each correct biased word/ phrase provided and a valid explanation of the intention. There are more than two biased words in the text so candidates should manage to find two words. However, according to the memo, one mark is awarded for identifying a biased word and two marks are awarded for a valid explanation. The envisaged Grade 12 will therefore find it very difficult to achieve the full six marks (expected response).
- Candidates need a high degree of understanding/background knowledge of the historical context/unbanning of the ANC in 1990 to explain the author's intention and thus to recognize the biased words/phrases. This content is very difficult for the envisaged learner (content).
- The expected response requires the learner to engage in three steps:
  - -an understanding of bias,
  - finding the words from the source, and
  - -explain the intention.

There is also stimulus difficulty in the question as the biased words are not explicit. The question is very difficult in relation to four possible sources of difficulty.

Memorandum/Marking guidelines

Question 3
- 'sworn enemies' – shows how estranged the two leaders had been,
- 'quest'- emphasises the importance (almost spiritual) of the work of de Klerk and Mandela,
- 'dare not' – emphasises the seriousness of the situation,
- 'survive'- emphasis on the importance of the situation,
- 'totally dependent'- emphasis on the closeness of their relationship, and
- Repetition of 'move' to indicate the importance of progressing with negotiations.

[biased word (1) + explanation (2) x2] (6)
Example 2:
Question:

DBE History P1, 2011

Question 4: What impact did the philosophy of Black consciousness have on South Africa in the 1970s?

4.1.2 Compare the two forces referred to in the source. Explain which of them you think was more oppressive. (2x2) (4).

Source 4A

The following is part of the evidence that Steve Biko gave at the Black Peoples' Convention (BPC) and South African Students' Organisation (SASO) trial in May 1976. (Taken from '*I write what I like*'.)

I think basically Black Consciousness refers itself to the black man and his situation, and I think the black man is subjected to two forces in this county. He is first of all oppressed by an external world through institutionalized machinery (State organs), through laws that restrict him from doing certain things, through heavy work conditions, through poor pay, through very difficult living conditions, through poor education, these are all external to him, and secondly , and this we regard as the most important, the black man in himself has developed a certain state of alienation (isolation), he rejects himself, precisely because he attaches the meaning white to all that is good, in other words he associates good and he equates good with white.

Discussion:

This question is classified as difficult for the envisaged Grade 12 candidate because:

- The task is deemed difficult for the envisaged Grade 12 candidate as it first requires them to understand and interpret the points that Biko is making about two forces. They have to recognize and identify that there are internal and external forces. They then have to classify what makes each force different. Finally, they have to make a judgment about which force was more oppressive and justify or provide an explanation of their choice. Evaluation and motivating a decision is a difficult task for the envisaged Grade 12 learner (task).
- The task has to be done using a text which has terms and phrases (such as 'institutionalized machinery', 'state of alienation', 'attaches the meaning') that are outside the reading vocabulary of the envisaged Grade 12. The source uses long words, it is dense to read, and difficult for the envisaged Grade 12 candidates to make sense of (stimulus).
- The concept of psychological alienation is a difficult one for the envisaged Grade 12 candidate to understand (content).
- The mark allocation is clear. The question shows that 4 marks are allocated for the question and candidates need to provide two responses that are each clearly weighted at 2 marks (2 x 2). The memo states that candidates can choose either the internal force or the external force. Candidates thus

have to condense what could be long answers into a few sentences, making sure that the information they provide is to the point and relevant. Marking a question such as this one is demanding for markers as they have to evaluate the relevance and logic of what each candidate writes.

The main sources of difficulty in question 4.1.2 are the *stimulus*, content and *task* difficulty but there is evidence of all four sources of difficulty to some extent.

Memorandum/Marking guidelines

4.1.2 Candidates can choose either the external force or the internal force.

External forces (from the laws of the state)
- It was through laws that governed black South Africans.
- These segregation laws restricted black South Africans.
- These laws created difficult conditions e.g. poor living and working conditions, poor pay, poor education etc.
- It was very difficult to fight against this oppressive system.
- Any other relevant response.

Internal forces (from within man himself)
- Psychological inferiority complex because of apartheid and indoctrination
- It's part of black South Africans' childhood development and very difficult to overcome.
- Black South Africans became used to not being associated with anything that was good.
- It is very difficult to change one's mindset because of the entrenchment of the policy of apartheid.
- Any other relevant response. (any 2 x 2) (4).

Example 3:

Question:

DBE History P2, 2012

Question 2: How successful was Angola in re-imagining itself after the collapse of Communism in 1989?

2.1.3 Explain the reference to the words 'escalation or negotiation' in the context of the conflict in Angola. (2x2) (4)

Source 2A

This extract focuses on the Soviet Union's decision to leave Angola at the end of the Cold War in 1989.
The key factor was the military disaster that overtook FAPLA (People's Armed Forces for the Liberation of Angola) in late 1987 and early 1988. This convinced Moscow and Havana of the need to reconsider their role in the theatre (Cold War in Angola). The fighting had proved conclusively that FAPLA could not stand up to a South African conventional force alone. The successes achieved by the very small South African force further suggested that even Cuban intervention might not be sufficient to oppose it, unless the Cuban force in Angola were reinforced. That would not only require additional men and equipment but also the creation of the

technical infrastructure needed to support a larger force in a country such as Angola.

Moscow and Havana were thus faced with a difficult choice: they could deploy additional Cuban troops with additional Soviet arms and equipment to counterbalance the South African army; they could withdraw the Cuban force and leave Angola to its own devices; or they could attempt to achieve a negotiated settlement that would get and keep the South Africans out. They could not simply carry on as before. Letting their MPLA (Popular Movement for the Liberation of Angola) clients go under was not an option that either Moscow or Havana could contemplate. That narrowed the choice: escalation (increase) or negotiation.

… Castro was not keen to deploy the additional forces needed to offer any hope of such a victory and was quite sure that Gorbachev would not be prepared to bear the financial or political cost. Moscow's judgment was essentially the same. The South African decision to deploy conventional forces in support of UNITA (National Union for the Total Independence of Angola) had thus changed the strategic picture unrecognisably. The Soviets had no doubts that they could outmatch and outlast South Africa in force levels, equipment and manpower. What they asked themselves was whether it could be worth the financial and political cost. In the era of glasnost, perestroika and Soviet financial difficulties, their conclusion was that it was not.

[From: War in Angola – The Final South African Phase by HR Heitman]

Discussion:

This question is classified as difficult for the envisaged Grade 12 candidate because:

- Source 2A is a secondary source which has quite dense semantic content and syntactic structure. The vocabulary is likely to be outside the vocabulary generally used by the envisaged Grade 12 learner (such as 'counterbalance', 'military disaster', 'proved conclusively', 'conventional force'). The linguistic features of this text make high reading demands on the envisaged Grade 12 candidate (stimulus).
- Candidates have to read the whole source in order to respond to the question; the reference is not easy to identify quickly making the task difficult. Understanding the reference itself and using their own words to explain the reference is also difficult (task).
- Understanding the context of the conflict in Angola is difficult for the envisaged Grade 12. There is little accessible information and few sources on it and the content is quite complex. (content).
- Candidates have to provide two responses that are allocated 2 marks each. This allocation is indicated in the question by (2x2) (4). So, the mark allocation is clear and straightforward. The marking memo is copied in the following section.
- Candidates thus have to condense what could be a long answer into a few sentences, making sure that the information they provide is to the point and relevant. Marking the question is demanding for markers as they have to assess the relevance and logic of what each candidate write (expected response).

The stimulus is the main source of difficulty but the question is difficult in relation to all four possible sources of difficulty.

Memorandum/Marking guidelines

2.1.3
- Conflict in Angola had intensified because of the Battle of Cuito Cuanavale (1987/88).
- The Soviet Union and Cuba had only two options – either to escalate support or withdraw from Angola so that negotiations could begin.
- They could escalate the war by deploying additional Cuban troops with additional Soviet arms and equipment to challenge the SADF which was not a viable option financially and politically.
- They could have withdrawn Cuban forces and leave Angola to its own devises so that a negotiated settlement would end the conflict and bring peace to Angola.
- Any other relevant response. (any 2 x 2) (4).

Example 4:

Question:

IEB Paper 1, 2013

3.5 Use your knowledge to explain whether the claim that the World Bank and IMF are responsible for the deaths of thousand from preventable diseases and HIV/AIDS is valid. (4).

The original source was published in 2004 and appeared on the Solidarity Philippines Australia Network <website www.cpcabrisbane.org>.

[Adapted from <http://cpcabrisbane.org/V18n1/IMF_WB> Accessed 20 July 2012]

* impoverished = poor

Discussion:

This question is classified as difficult for the envisaged Grade 12 candidate because:

- The task requires learners to use their own knowledge to make an evaluation about how valid a claim is. They also have to make a judgment and justify

their choice. Evaluation and motivating a decision is a difficult task for the envisaged Grade 12 candidate under exam conditions. They have to write an extended text in a paragraph form rather than a list of points.

- Candidates need to have knowledge of broader issues around the World Bank, the IMF, structural adjustment and conditional loans to answer the question. The envisaged Grade 12 candidate finds this content difficult especially as globalisation is currently a fairly new topic in the CAPS (content).
- The nature or genre of the stimulus is not very obvious. Candidates would need to recognize that it is a birthday card for the World bank's and IMF's 60th birthday, but that it is different from a typical birthday card in that it does not send congratulations, but calls for these institutions to drop the debt of impoverished countries. (stimulus).
- The required response is a paragraph for 4 marks. The memo response is provided in the following section.
- Candidates have to make four points to justify their choice within a paragraph. Thus, they have to write a succinct response in a coherent paragraph. Marking the question is demanding for markers as they have to assess the relevance and logic of what each candidate writes (expected response).

The main area of difficulty in this question is the *task* and the *content* difficulty while the question is moderately difficult in relation to other sources of difficulty (expected response and stimulus).

Memorandum/Marking guidelines

3.5

It is valid. In order to receive loans for the World bank, developing countries had to agree to submit to structural adjustment programmes. One aspect was cutting back on civil service facilities such as health programmes which would lead to deaths from preventable diseases. The World Bank and IMF have done little to alleviate Third World debt, so these countries are too poor to deal with problems such as HIV/AIDS.
OR
No, it is not valid. The source is exaggerated and unfairly critical. The IMF and World Bank provide loans to under-developing countries which allows for their economies to develop. However, it is the corrupt and ineffectual governments of the countries who are to blame for the deaths as they do not develop their countries' infrastructure. (4)

Table 10: EXAMPLES OF QUESTIONS AT DIFFICULTY LEVEL 4 – VERY DIFFICULT

Example 1:
Question IEB History P1, 2011: **Section A** 1.3 How might a Soviet History teacher use this photograph to teach students about the origins of the Cold War? Use your knowledge and refer to one visual clue in the photograph to formulate your answer. (5 marks) QUESTION 1   VISUAL ANALYSIS This photograph – dated 11 February 1945 – was taken in the courtyard of Livadia Palace, Yalta in the Crimea. The photographer is unknown.
 [<www.bestOf.com/top-20-influential-famous-photographs>]
Discussion: This question is classified as very difficult for the envisaged Grade 12 candidate because: • The candidate has to imagine or place him or herself in the shoes of a Soviet History teacher (engage in empathy), and think about how that teacher might use a particular photograph to teach Soviet students about the origins

of the Cold war. This requires high levels of visual literacy. They also have to write a sustained explanation and argument in a paragraph (task).

- Finding a visual clue in the stimulus photograph requires high levels of visual literacy. Candidates have to recognize the central characters and use background knowledge to interpret the clues (stimulus).
- Candidates require knowledge of how Soviets would have felt towards the Western powers at this particular time. Answering the question also requires an understanding of how a Soviet teacher would interpret the photograph, and would present it in a biased way to his/her students (content).
- According to the marking memorandum, the visual clues that learners are expected to describe are:
  - Yalta was in the Crimea on Stalin's home ground, yet the Western powers have not acknowledged his central role, they have placed him on the side.
  - Stalin is leaning towards the Western powers showing his willingness to engage in meaningful dialogue. But the imperialist powers are deliberately ignoring him/ turning away from him/ shunning his friendly gestures.

The mark allocation is 5 marks, so candidates need to develop a fairly detailed account of how a Soviet History teacher might use the photograph, and not simply give one point. The envisaged candidate may not provide sufficient amount of detail in their response to earn all the marks. Marking the question will be demanding as candidates' responses will differ and markers will need to interpret and evaluate the logic of what each candidate writes (expected response).

This question is very difficult mainly because of the task, but it is also difficult in relation to the three other possible sources of difficulty.

Memorandum/Marking guidelines

1.3
- Yalta was in the Crimea on Stalin's home ground, yet the Western powers have not acknowledged his central role, they have placed him on the side.
- Stalin is leaning towards the Western powers showing his willingness to engage in meaningful dialogue. But the imperialist powers are deliberately ignoring him/ turning away from him/ shunning his friendly gestures. (5)

Example 2:

Question:

IEB Paper 1, 2014

Section C Source-based essay
Using Sources, A – H in the Source booklet to write a source-based essay on the following topic:

To what extent was the period 1990 to the end of 1993 characterized more by acts of violence than by peaceful negotiations?

SOURCE A   **An extract from a book written by the South African journalist and historian Michael Morris**

Two months earlier (in June 1990) De Klerk had lifted the state of emergency everywhere except in Natal where violence was worsening. Bloodshed though would continue to strain the process to the very end. Talks were constantly interrupted by outbreaks of violence that claimed an average of more than ten lives a day, a higher death rate than in the 1980s … Whenever there was a crisis, De Klerk and Mandela would routinely be the ones to meet and resolve it. But their relationship became increasingly strained, chiefly over violence, with each leader doubting whether the other was doing enough to curb it.

ANC suspicions mounted over what soon came to be called 'third force' activity: underhand conduct by rogue* elements in the army and police who were dead set on sabotaging negotiations, or, at the very least, channeling arms to, and encouraging, Mangosuthu Buthelezi's Inkatha movement in its vicious contest with the ANC in Natal and on the Witwatersrand.

[Morris, Michael, *Apartheid: An Illustrated History*, 2012, page 165]

* rogue – undisciplined

SOURCE B   **An extract from a book written by the former newspaper editor Allister Sparks shortly after the unbanning of the ANC in 1990**

It is a unique relationship of two political opposites, sworn enemies for most of their lives, who have become political partners in a quest to end apartheid and lay the foundations for a new South Africa. It is a quest in which each is totally dependent on the other, for neither has a viable fall-back position. De Klerk cannot outlaw the ANC again, send Mandela back to prison and revert to apartheid. Having raised internal and international expectations of change, he dare not even stand still; to survive he has to keep moving forward, and he can only move if Mandela moves with him. Likewise the ANC leader cannot revert to a revolutionary war he now knows he cannot win, especially with the Soviet Union no longer interested in sponsoring it. He, too, must move to survive, and he can only move in tandem* with De Klerk.

[Sparks, Allister, *The Mind of South Africa: The Story of the Rise and Fall of Apartheid*, 1990, page 406]

* in tandem – together

SOURCE C   **A table showing the figures for deaths in political violence in KwaZulu-Natal province alone (Column 1) and the total number of deaths in political violence involving mainly supporters of Inkatha and the ANC for the whole country (Column 2)**

YEAR	COLUMN 1: Political Deaths in KwaZulu-Natal province	COLUMN 2: Political Deaths in South Africa
1991	1684	2706
1992	1427	3347
1993	1489	3794
1994	1464	2434

[Welsh, David, *The Rise and Fall of Apartheid*, 2009, page 401]

SOURCE D A photograph of Chief Mangosuthu Buthelezi (left), FW de Klerk (centre) and Nelson Mandela (right) at the Convention for a Democratic South Africa (CODESA) in December 1991. The photographer is unknown.

[<www.dailysun.co.uk> Accessed 14 January 2014]

SOURCE E An extract from a British schools' history textbook

For a while it looked as if the country might collapse into anarchy*, but Mandela and De Klerk recognised that the problems could only be solved if they worked together. They began to look for a way out. Joe Slovo, who had been the leader of the South African Communist Party (SACP) for many years, suggested that the African National Congress (ANC) and the National Party (NP or Nationalist Party) share power for five years. In September 1992 the parties signed the Record of Understanding in which they agreed to renew negotiations. Buthelezi pulled his Inkatha out of the process. Disturbing talk of civil war became widespread.

[Mulholland, Rosemary, *South Africa 1948 – 1994*, 1997, page 62]

* anarchy – chaos, breakdown of law and order

SOURCE F **An extract from a book written by an American historian**

Amy Biehl was an American anti-Apartheid activist who was living in South Africa in the 1990s. She was murdered outside Guguletu, Cape Town, on 25 August 1993 by a group of men who dragged her from her car shouting racial slurs. Four of Amy Biehl's murderers were convicted for her murder. In 1998 the T.R.C pardoned all of them. Biehl's family was supportive of the decision and her father, Peter, shook the murderers' hands stating that: 'the most important vehicle of reconciliation is open and honest dialogue … we are here to reconcile a human life which was taken without an opportunity for dialogue. When we are finished with this process we must move forward with linked arms.'

[Eglash-Kosoff, C., *The Human Spirit: Apartheid's Unheralded Heroes*, 2010, page 202]

SOURCE G **An extract from Nelson Mandela's television address on SABC TV on the evening of the assassination of Chris Hani, 10 April 1993. Shortly thereafter the ANC announced that negotiations would continue.**

A white man, full of prejudice and hate, came to our country and committed a deed so foul that our whole nation now teeters* on the brink of disaster … But a white woman, of Afrikaner origin, risked her life so that we might know, and bring to justice, the assassin … Tonight I am reaching out to every single South African, black and white, from the very depths of my being. Now is the time for all South Africans to stand together against those who, from any quarter, wish to destroy what Chris Hani gave his life for – the freedom of all of us … This is a watershed* moment for all of us. Our decisions and actions will determine whether we use our pain, our grief and our outrage to move forward to what is the only lasting solution for our country – an elected government of the people, by the people and for the people.

[Mandela, Nelson, *Conversations with Myself,* 2010, page 337]

* teeters – balances unsteadily; sways back and forth
* watershed – turning point

SOURCE H   A cartoon by the South African cartoonist Derek Bauer that focuses on the conclusion of the negotiation process on 18 November 1993 after many months of tough negotiations that were also interrupted by various violent events.
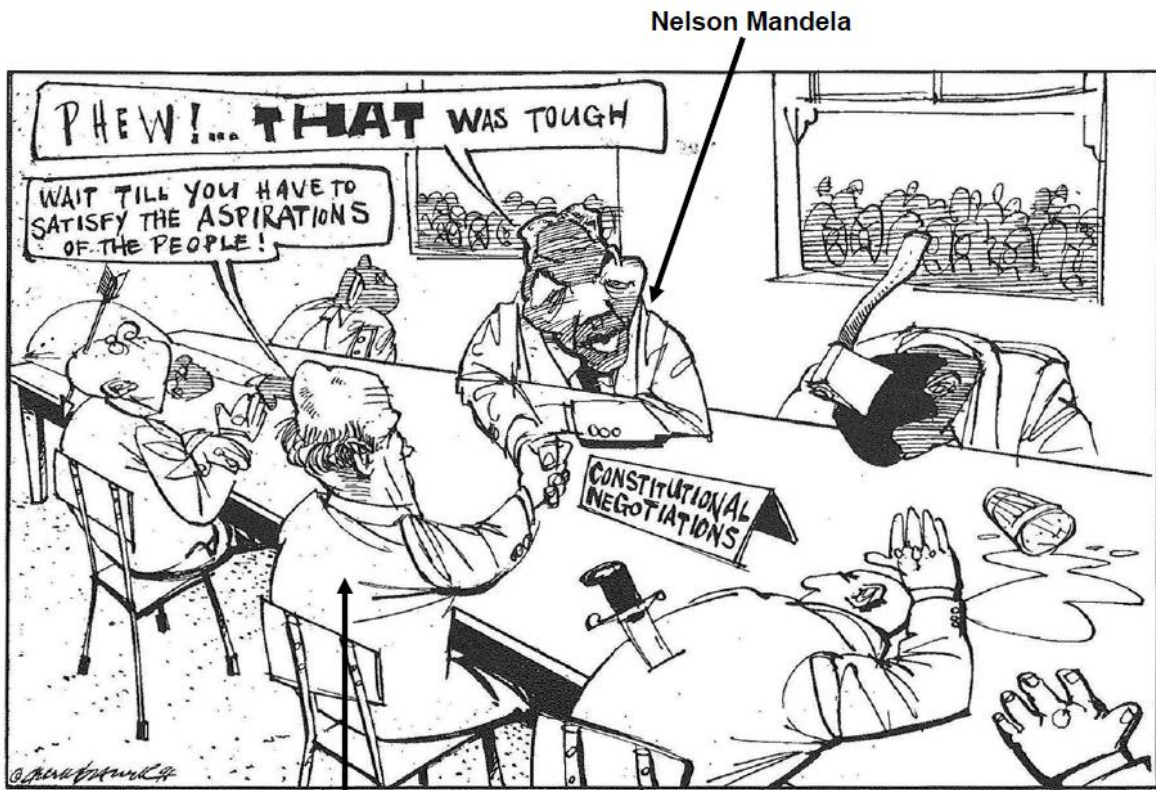
Nelson Mandela

F.W. De Klerk

[Dugmore, Harry, *Nelson Mandela: a life in cartoons*, 1999, page 106]

Discussion:

This question is classified as very difficult for the envisaged Grade 12 candidate because:

- The *task* requires learners to analyse and work with all eight sources representing different genres (both primary and secondary texts, a table of figures, a photograph and a political cartoon). They have to integrate and synthesise the interpreted information from each source into a coherent argument. The task is not simply to provide a description of the content of each of the sources; each source must be interpreted and understood and then used to create a coherent argument. Candidates have to show clearly how each source supports either acts of violence or peaceful negotiations and use their analysis to argue whether or not the period 1990 to the end of 1993 was characterized more by acts of violence than by peaceful negotiations. They have to combine or link a number of complex ideas to make a judgement. They have to develop and order their ideas logically and write discursively (argumentatively or analytically) (task difficulty).
- Candidates need an in-depth and detailed understanding of the era of the early 1990s and the CODESA negotiations in order to be able to contextualize the sources, but this content of the negotiation processes is not inherently difficult (*content*).

- The stimulus material comprises eight different sources which all need to be 'unpacked' and interpreted. The sources present varying levels of difficulty but all are categorized as easy or of moderate difficulty.

Source A is an extract from a book about apartheid by Michael Morris (moderate as it is a fairly short extract, and the concepts are not heavily semantically dense.) Source B is an extract from a book by Alistair Sparks (moderate as it is a fairly short extract, and the concepts are not heavily semantically dense.) Source C is a table showing the figures of political deaths in KwaZulu-Natal and South Africa (easy as the table simply reports on the deaths per year). Source D is a photograph of Buthelezi, de Klerk and Mandela (easy as the photograph is not difficult to interpret).

Source E is an extract from a British school textbook (Moderate difficulty as it is written for a school learner audience so the language is straightforward, and the concepts are not difficult).

Source F is an extract about Amy Biehl from a book by Eglash-Kisoff. This would be easy to read as it is a description of Amy Biehl's murder, and not an abstract discussion of concepts. It is a short extract.

Source G is an extract from Nelson Mandela's television address after the murder of Chris Hani. This is of moderate difficulty as it is short and the difficult words are defined in a glossary.

Source H is a cartoon about the conclusion of the negotiation process. This is of moderate difficulty as learners need to read the figurative meaning that there were many 'casualties' in the process.

While each source is fairly short and none are categorized as difficult, it is the task of comparing, analysing and synthesizing a new argument that makes the task very difficult. What makes the stimulus very difficult in its entirety is that the question requires candidates to cross-reference information from all eight sources. (stimulus)

- 50 marks are allocated for this essay question. There is no indication to candidates of how much to write with regard to each source. Candidates could experience difficulty in deciding how much they need to write about each source. The marking memo shows the level of detail required of learners regarding each source (see next section).

The marking rubric shows that learners are assessed on their use of sources, the focus and argument and the counter argument, their writing structure and style, as well as a 'global' overall impression. However, essay questions such as this which require analysis, synthesis and evaluation require demanding marking strategies; candidates' essay responses will differ and, ultimately markers have to use their professional judgement assessing each candidate's response (expected response) The question is very difficult with respect to the task and expected response
sources of difficulty outline in the framework.

SECTION C   **SOURCE-BASED ESSAY**

Use Sources A to H in the Source Booklet to write a source-based essay on the following topic:

To what extent was the period 1990 to the end of 1993 in South Africa characterized more by acts of violence than by peaceful negotiations?

Be sure to use the sources provided to construct your argument and remember to reference the sources by letter.

SOURCE	MORE BY VIOLENCE	MORE BY PEACEFUL NEGOTIATIONS
	Focus words: great extent/large extent	Focus words: lesser extent/small extent
A	Violence in KZN: 'Two months earlier (in June 1990) De Klerk had lifted the state of emergency everywhere except in Natal where violence was worsening.' Violence generally: 'Bloodshed though would continue to strain the process to the very end.' Interruption of negotiations: 'Talks were constantly interrupted by outbreaks of violence that claimed an average of more than ten lives a day, a higher death rate than in the 1980s …' Third force: 'ANC suspicions mounted over what soon came to be called 'third force' activity: underhand conduct by rogue* elements in the army and police who were dead set on sabotaging negotiations, or, at the very least, channeling arms to, and encouraging, Mangosuthu Buthelezi's Inkatha movement in its vicious contest with the ANC in Natal and on the Witwatersrand.'	Good relationship: De Klerk and Mandela worked together to manage the violence: 'Whenever there was a crisis, De Klerk and Mandela would routinely be the ones to meet and resolve it.'
B		Mandela and De Klerk's relationship: 'It is a unique relationship of two political opposites, sworn enemies for most of their lives, who have become political partners in a quest to end apartheid and lay the foundations for a new South Africa.' 'Having raised internal and international expectations of change, he dare not even stand still; to survive he has to keep moving forward, and he can only move if Mandela moves with him.'
C	Figures for deaths in political violence in KwaZulu/Natal province alone and the total number of deaths in political violence involving mostly supporters of Inkatha and the ANC for the whole country.	
D		Breakthrough: A photograph of Chief Mangosuthu Buthelezi (left), FW de Klerk (centre) and Nelson Mandela (right) at the Convention for a Democratic South Africa (CODESA) 1 in December 1991. Shows peaceful negotiations and a warming of relations.

E	Threats of violence: 'For a while it looked as if the country might collapse into anarchy ...' 'Buthelezi pulled his Inkatha out of the process. Disturbing talk of civil war became widespread.'	Breakthrough/negotiations: 'Mandela and De Klerk recognized that the problems could be solved if they worked together.' 'Joe Slovo, who had been the leader of the South African Communist Party (SACP) for many years, suggested that the African National Congress (ANC) and the National Party (NP) share power for five years.' 'In September 1992 the parties signed the Record of Understanding in which they agreed to renew negotiations.'
F	Ongoing violence: 'Amy Biehl was an American anti-Apartheid activist who was living in South Africa in the 1990s. She was murdered outside Guguletu, Cape Town, on 25 August 1993 by a group of men who dragged her from her car shouting racial slurs.'	
G	More violence – assassination of Chris Hani: 'A white man, full of prejudice and hate, came to our country and committed a deed so foul that our whole nation now teeters* on the brink of disaster ...'	Mandela's appeal for peace: 'I am reaching out to every single South African ... to stand together.' Continuation of negotiations: Shortly after Mandela's address on TV the ANC announced that negotiations would not be called off.
H	Reference to violence: Spears and axes through heads; dead people.	Negotiations succeeded: However, Mandela and De Klerk are shaking hands and the peaceful outcome of negotiations – a new democratic SA – is achieved.

50 marks

Example 3:

Question:

Question DBE History P1, 2011

Question 2: How did Julius Nyerere's policy of Ujamaa transform Tanzania into a Socialist state during the 1960s and the 1970s?

2.6.2 Julius Nyerere states: 'We have dedicated ourselves to build a socialist society in Tanzania'.

Critically evaluate this statement by using the information from ALL the sources and your own knowledge. (30)

SOURCE 2A

This source highlights socialism and self-reliance in Tanzania under Julius Nyerere's leadership. Taken from *History of Africa* **by K Shillington.**
Nyerere's vision of a future Tanzania was of a prosperous, self-reliant and classless society. He called it 'African socialism' ... Tanzanian socialism was to be based on local resources rather than imported, high-technology industrialisation. The country's main banks and foreign-owned capitalist companies were to be

'nationalised', that is, taken over by the state on behalf of the people. A 'Leadership Code' banned political leaders from accumulating (building up) private wealth. The main emphasis of government was on rural development, leading to self-reliance.

Nyerere proposed the gathering together of Tanzania's mass of small remote rural settlements into larger, more effective villages. This would make it easier for government to provide better roads and rural markets combined with agricultural advice and improved technology. Better water, health and education facilities could also be provided more efficiently to larger, centralised villages. The policy was known as 'Ujamaa'. A vital aspect of 'Ujamaa' was the promotion of the 'African socialist' principles of communal labour for the benefit of the community. Applied to the new large villages it would, Nyerere believed, increase agricultural productivity, enabling communally cultivated fields to produce a surplus for sale to the towns or for export.

SOURCE 2B

The sources below consist of viewpoints on how Nyerere implemented his policies. Both these viewpoints are taken from *The State of Africa* by M Meredith.

VIEWPOINT 1: Sylvain Urfer, a French writer, explains how Ujamaa was implemented.

Between August and November 1974, it was as if a tidal wave had washed over the country, with millions of people being moved in a dictatorial manner, sometimes overnight, onto waste land that they were expected to turn into villages and fields. In many places, the army was called in to bring anyone who was reluctant (not willing) to heel and move them manu militari (using military arms/weapons). During the month of October, the country seemed to be emerging from some national disaster, with huts made from branches and foliage (undergrowth) stretching in untidy rows beside the roads.

VIEWPOINT 2: Martin Meredith gives his opinion on the outcome of the Villagisation (communal living/farming) programme.

The disruption caused by the 'Villagisation' programme nearly led to catastrophe (disaster). Food production fell drastically, raising the spectre (presence) of widespread famine … The shortfall was made up with imports of food, but the country's foreign exchange reserves were soon exhausted. In 1975 the government had to be rescued by grants, loans and special facilities arranged with the assistance of the International Monetary Fund (IMF) and the World Bank and by more than 200 000 tons of food aid. Far from helping Tanzania to become more self-reliant and to reduce its dependence on the international market economy, Nyerere's Ujamaa programme made it dependent for survival on foreign handouts.

This poster below explains the policy of ujamaa. It was done by Tanzanian artist, D Mwambele.
Taken from the internet on the website http://www.ntz.info/gen/n01559.html.
The words on the poster were retyped because of the lack of clarity.

WHAT IS UJAMAA?

UJAMAA MEANS FAMILY TREE OR TREE OF LIFE, AND SHOW HOW,

JOINTLY DIFFERENT MEMBERS OF MAKONDE TRIBE SURVIVE AND
SHOWS DIFFERENT,

ASPECTS OF WAYS OF LIFE AMONGST THE TRIBE,

MAKONDE TRIBE THE WORLD FAMOUS CARVES UJAMAA FROM ONE
PIECE OF EBONY WOOD,

ART, THIS FORM OF ART IS PASSED FROM ONE GENERATION TO
OTHER AND,

APPRECIATED BOTH LOCALLY AND INTERNATIONALLY.

Discussion:

This question is classified as very difficult for the envisaged Grade 12 candidate because:

- The *task* requires candidates to understand three sources, identify the important and relevant information in each source; and synthesise the information from the different source to make a critical evaluation. They have to write extended text which assimilates information from all three sources and their own background knowledge to develop a line of argument. Writing extended text discursively is very difficult for the envisaged Grade 12 (task).
- Of the three sources provided, two are secondary sources, and the third is a primary source, a poster.
- Source 2A is an extract from a booked called History of Africa. It is quite a long passage and would be categorized as a moderately difficult stimulus.

- Source 2B is in fact two different perspectives on *Ujamaa* and each is fairly short. Although the stimulus material usually provides explanation of terms/phrases that candidates might find difficult e.g. *manu militari (using military arms/weapons),* the two texts are fairly dense for Grade 12 candidates to read and interpret.
- Source 3B is a poster which does not provide a lot of information that is useful for writing the essay. This becomes a source of unintended difficulty as it would be difficult for a candidate to infer from this anything about socialism.
- So, while each source is not necessarily a source of difficulty on its own, what makes the stimulus very difficult is that the question requires candidates to cross-reference information from all three sources (stimulus).
- The envisaged Grade 12 candidate finds the topic 'independent Africa' fairly difficult as concepts of socialism, nationalization and foreign debt are complex concepts. Currently there is a lack of resources for teaching the topic in schools (*content*).
- 30 marks are allocated for writing an essay response with no indication to candidates of how much to write in relation to each source. Candidates could experience difficulty in deciding how much and what they need to write with regard to the sources and to their own background knowledge. According to the memo, the response is marked using an assessment matrix. The mark allocation for an extended piece of writing is more implicit than explicit, and can be more subjective than objective. Candidates' essay responses will differ and, ultimately markers have to use their professional judgement assessing each candidate's response (*expected response*).

The question is very difficult with respect to the task and the expected response sources of difficulty outline in the framework, and difficult with respect to the stimulus and content sources of difficulty.

Memorandum/Marking guidelines

2.6.2
Synopsis

Candidates should evaluate how Nyerere developed Tanzania after gaining independence

Main Aspects
Candidates should include the following points in their response
- Introduction: candidates should evaluate the statement and show whether Nyerere built a socialist society in Tanzania

Elaboration
- Nyerere's vision of a socialist Tanzania was set on in the Arusha declaration.
- Nyerere's policy of Ujamaa was explained.
- Tanzania should be self-reliant.
- Rural development was important – called villagisation.
- Class distinction had to be eliminated.
- Key companies were nationalized.
- Nyerere set up a Leadership Code prohibiting political leaders to become corrupt.
- A one-party state was set up in Tanzania (TANU).

- Successes of Ujamaa included: the gap between the rich and poor was reduced; more schools and free primary education led to a high literacy rate; better health care was available; more people had access to clean water; life expectancy increased.
- Failures of Ujamaa included: many Tanzanians resisted villagisation; Tanzanians preferred to live in their traditional communities; Tanzania ran up a huge foreign debt; Tanzania owed huge amounts to the World bank; Tanzania had to export as much as possible to provide for the need of people; there was little freedom of speech in Tanzania.
- Any other relevant response.
- Conclusion: Candidates should tie up their argument with a relevant conclusion. (30)

9.   CONCLUDING REMARKS

This exemplar book is intended to be used as a training tool to ensure that all role players in the History Examination are working from a common set of principles, concepts, tools and frameworks for assessing cognitive challenge when examinations are set, moderated and evaluated. We hope that the discussion provided and the examples of questions shown by level and type of cognitive demand and later by level of difficulty assist users of the exemplar book to achieve this goal.

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