

Controlled Assessment in OCR Modern World History (Unit 3: A973)

General advice

As we have already seen in the Introduction, Controlled Assessment is new territory for most History teachers and indeed many teachers of many other subjects as well. However, we are not operating completely in the dark. Controlled Assessment has been operating in the OCR GCSE History Pilot for several years and some subjects have been operating Controlled Assessment or similar arrangements for much longer.

The most important piece of general advice which we can give is to consult your Examinations Officer about whole-school assessment before you undertake any major planning and preparation. Controlled Assessment is likely to have a major impact on school resources such as rooms, availability of staff, access to ICT resources, and disruptions to timetables. Most schools are therefore likely to have an overall school policy on the issue within which you will have to operate. Finding out about such policies can hopefully circumvent a potential situation in which a History department carries out a lot of detailed planning and preparation which turns out to be wasted because it does not fit with the school's approach. The most important advice is therefore to engage with the school policy at the earliest possible stage, and hopefully help to shape that policy.

How it works

Full details of how Unit 3 will work will be in the OCR specification, and you should also visit the website on a regular basis to stay in touch with any developments which might take place. However, the broad outline of Unit 3 is:

- It should be approximately one term of study.
- It should not cover content which is already being tackled for the examination papers.
- The course of study you cover should be genuine – i.e. a broad course comparable to a Paper 1 Depth Study rather than a course which is narrowly focused on an assignment topic.
- You determine the broad area of content.
- Each year OCR will set a task which is a generic stem. You must then adapt the task so that it is suitable to assess your students based on the content you have covered and you have the option to create a source booklet to help students with their research and writing up the final assessed task. The task set by OCR will provide the following options:
 - The Role of the Individual in Twentieth-Century History
 - A Thematic Study in Twentieth-Century History
 - A Modern World Study
 - A Study in Depth from the period 1850–2005.

The nature of the task

It should be stressed that the task is an analytical exercise and need not be a synoptic one. For example, in the Thematic Study you may wish to cover a theme such as warfare in the twentieth century. However, in the task you could impose limits on the time period the students are asked to cover (e.g. looking at change and continuity 1900–18) or the theme(s) you ask them to explain (e.g. the role of aircraft rather than warfare as a whole). Students do not have to cover the entire course of study in their task answer, and in many cases will probably need to be discouraged from doing so.

Planning your unit

A good starting point for planning this Unit is the specification. You cannot cover all the options available within the specification and so it may be useful to base your Unit 3 course on one of the areas of the specification which you do not cover. Even if you choose an area which is not on the specification it is a good idea to try and plan the unit in the same style as the current specification, with Focus Tasks and Focus Points. Of course, if you do base your Unit 3 work around one of these options, then you are quite at liberty to amend the details and structure of the Unit. You do not have to follow it faithfully as you might do with a unit which is to be examined.

You should plan at least one trial run of the Controlled Assessment process. Ideally, you should try to plan more than one. You could even try out the process of Controlled Assessment with pre-GCSE groups to get them and you familiar with the practical details. As well as school policy, there will be many details which are specific to your school and your students. For example, OCR sets out broad guidelines on the number of hours allowed (up to eight hours) and word limits (2000 words). For some classes these limits may be inappropriate or even unproductive. It is quite possible to help some candidates by giving them less time and helping them to avoid distraction. There will be other factors to consider such as access to ICT resources. You may also want to try out different (or even differentiated) versions of the source booklet – in some trials it might not be a booklet at all but a CD or website. Trial runs will help to iron out some of these issues.

Finally, be flexible. The specification allows this! It may be that when you start a unit your plan is to address the Thematic Study but it is possible that your students become interested in one or more of the key individuals who emerge in the course and you end up basing the Controlled Assessment on the role of the individual. This is another reason (apart from the specification telling you) to construct a course which is not narrowly focused on one task. On the other hand, you are in control and so you need not spend a lot of time on material which is irrelevant or potentially distracting.

Where do the textbook and CD chapters fit into this picture?

1 The Normal Way!

Whatever option you take and however you construct your course, you will need a key resource. For most of the course of study the textbook or its CD-ROM chapter equivalent will play the role it normally plays in your teaching.

- It will be a source of information.
- The questions, activities and Focus Tasks will help to guide students' learning.

Thus, if you decide to tackle Option 3: A Modern World Study, and your focus is on Terrorism, then you could use the OCR Depth Study on Terrorism as your course and Chapter 8 as your key resource (even though you may be focusing only on al-Qaeda and so will gloss over the material on the IRA and PLO). As you work through the body of your course you will use the textbook just as you use it in a normal unit, although you may add additional activities or simply hold plenaries which flag up issues of particular relevance to the Controlled Assessment task.

2 The Path Way

You will probably use additional and supplementary resources as well, but remember that in a flexible course like this you are likely to be able to use other sections of the book as additional sources of information. For example, in your terrorism unit you are quite likely to find useful information in the chapter on the Iraq War. You will even find useful background information in Chapter 1 on the peace treaties, which show some of the divisions created in the Middle East that remain problematic today. Such an approach requires organisation and imagination on the part of students. Achieving this level of initiative is an admirable aim, and it could even be credited in the final assignment if it results in answers which effectively manage a wide range of information. However, it is a difficult skill and needs practice, so you may initially want to build pathways for students through the book. In the example above, such a pathway might begin as follows:

Issue	Pathway
Background to al-Qaeda: Why does the Middle East look like it does today?	<ul style="list-style-type: none"> • Peace Settlements pages 16–17 • PLO Outline page 158

You might take a similar pathway-based approach to the British Depth Study Chapters 14 and 15 if you were undertaking a Thematic Study on the role of women in Britain in the twentieth century.

3 The Booklet Way

One of the key features of the OCR Controlled Assessment is the recommendation that you create a booklet of source material which students can draw on as they tackle the Controlled Assessment task. It seems likely that many of the sources will be drawn from the textbook, although you will of course use others. As well as you doing this work, it might be useful and motivating for students to build up their own collection of source material. Thus, when they tackle a particular section, you can set a review task asking them, for example, which five sources in this section would you definitely include in a source booklet for the Controlled Assessment task and why? The actual booklet itself could be

built up rather than be simply a list of choices. In this instance an electronic file is ideal for its facility to be edited and re-edited.

Unit 3 Option 1: The Role of the Individual

Is this the right option for you and your students?

The critical focus in this option is the importance or significance of the individual being studied. It is vitally important for students to understand this as they work through a Unit and write up their assessment. Focusing on an individual can have great appeal for students. The characters in question may be inspiring (or indeed evil) and at the most obvious level there is the human dimension – the focus will be on a person rather than a process or a concept. However, the danger of this focus is that when students set out to write their assignments they drift into a narrative biography rather than a critical analysis of the importance or significance of the individual. These concepts are not beyond most students but they are concepts which need practice and thought.

Planning and preparation – using KS3

Students will only do themselves justice if they are familiar with these ideas and concepts before they tackle the Controlled Assessment. Clearly this means addressing them through the Unit, but ideally it also means building on previous work at KS3. The Teachers TV programme *Hard to Teach – Secondary History* (<http://www.teachers.tv/video/5443>) looks at how Year 7 students can begin to grapple with reputation as a form of interpretation. If students revisit these ideas regularly, they should have no difficulty with the concepts when it comes to Controlled Assessment. For example, in their KS3 studies they might consider the reputations of figures such as Henry VIII, Elizabeth I, Charles I, Oliver Cromwell, Richard Arkwright, Winston Churchill – perhaps by looking at them in small-scale Controlled Assessments. When preparing your GCSE students for the final assessment, you might want them to watch the Teachers TV programme themselves, or extracts from it.

Planning and preparation – the GCSE course

The most obvious starting point when planning a Unit 3 course is to consider which content area you will cover. This makes sense but, even before that stage, it may be helpful to consider what students will be asked to do in the course of the Unit and in their Controlled Assessment. Students will be required to consider:

- the significance of an individual by using criteria for measuring the immediate and the long-term impact of an individual (this could include beyond the lifetime of the individual)
- the significance of an individual compared to other factors
- the significance of an individual compared to other individuals.

In the process of making judgements about such issues, students will almost certainly have to show their ability to use sources critically as well as the concept of historical interpretation as they assess the reputations of the figures being examined.

These considerations should all impact on the choice of content area and the way in which the focus points within that content area are constructed. For example, an immediate and obvious case study for the role of the individual would be Hitler and Nazi Germany. There are clear pros – a contentious figure and a wealth of resources and debate about him. However, there are also potential cons. The majority of resource material is pitched at quite a high level as it is aimed at the post-16 and HE sector. Also, how easy is it to assess Hitler's long-term impact? Much of his impact is in the form of influence and mind sets, which is not easy for a GCSE student to manage and explain. A more practical choice might be to look at Stalin's significance. His time in power is much longer and therefore his long-term impact might be easier to assess. There is ongoing debate, especially in Russia, about his legacy. His impact was undeniably profound – millions were affected by his actions and he was a key player in the Cold War. Even after his death, Stalin's ideas shaped Soviet policy. Russia/the USSR also provides numerous significant individuals with whom meaningful comparisons might be made, e.g. Lenin, Khrushchev, Gorbachev.

Thus an awareness of the understanding students will need to show might help guide the selection of content for the Unit 3 course. For the significance of historical individuals, a useful starter guide might be Schools History Project director Ian Dawson's model. This suggests that a person is significant if he/she:

- changed events at the time they lived
- improved a lot of people's lives – or made them worse

- changed people's ideas
- had a long-lasting impact on their country or the world
- had been a very good or a very bad example to other people of how to live or behave.

There is more excellent guidance on teaching historical significance at these locations:

- Historical Association/QCA:
http://www.history.org.uk/resources/secondary_resource_1097_45.html
- Ian Dawson:
<http://www.thinkinghistory.co.uk/ActivityBase/SignificantPeopleKS3Overview.html>
- Terry Haydn, PGCSE tutor at UEA:
<http://www.uea.ac.uk/~m242/historypgce/signif/welcome.htm>

Choosing your unit

The Modern World History course provides a huge range of possible individuals and contexts upon which to base your Unit 3 study on the role of the individual. Here are some possible candidates. Each would meet at least some of Ian Dawson's criteria for significance. However, in order to meet OCR's requirements you can see that there would be a need to adapt the existing specifications for at least some of these individuals so that all aspects of the significance of the individual are covered.

Individual	Immediate impact	Long-term impact	Significance compared to other factors	Significance compared to other individuals
Neville Chamberlain	Domestic record as Chancellor and PM, Appeasement	Influence/legacy of Appeasement	Depression, League of Nations	Stalin, Hitler, Churchill
John F Kennedy	Camelot factor, Cuban Missile Crisis	Intellectual/conceptual legacy – comparisons with Obama, involvement in Vietnam	Cold War, Civil Rights movement	Eisenhower, Johnson, Nixon, Martin Luther King
Franklin D Roosevelt	Hundred Days, New Deal, Second World War	New Deal philosophy, US involvement in world affairs	Depression, Congress	Eleanor Roosevelt, Huey Long, Harold Ickes, Truman
Mikhail Gorbachev	Reform of USSR	End of Cold War, impact on eastern Europe, reputation today	Condition of USSR, Cold War, Afghanistan	Reagan, Stalin, Putin
Mao Zedong	Takeover of China, Rule of China, Great Leap Forward, Cultural Revolution	Reputation, controversy, nature of China today	Cold War, China's history, population	Deng Xiaoping
Mohandas Gandhi	Campaigns in South Africa, campaigns in India	Practical – independence and nature of modern India, philosophy of non-violence	Second World War; influence of USA; public opinion in Britain; political change in Britain; political, religious and social changes in India	Nehru, Jinnah, Churchill, Mountbatten
Martin Luther King	Civil Rights Campaigns, Civil Rights Act, campaigns over poverty	Reputation, Martin Luther King Day, Links to Obama	Cold War, Vietnam, US economy	Malcolm X, Kennedy, Johnson and Nixon

Customising your Unit 3 Study on The Role of the Individual

Remember that the specification allows you to be flexible, so you could focus your Unit 3 course on a theme such as ‘Key individuals in American History’. A course like this could focus on any aspect of twentieth-century history, but a possible approach might be:

Part 1: Economy and society

- rugged individualism – why the idea of the individual was so important in the USA
- Henry Ford
- Al Capone
- the Warner Brothers.

Part 2: Depression and the New Deal

- Franklin D Roosevelt
- Eleanor Roosevelt.

Part 3: The struggle for equality

- Martin Luther King
- Malcolm X
- John F Kennedy
- Lyndon Johnson
- Richard Nixon.

Parts 1 and 2 of this Unit would be well supported by Chapter 13 of the book, although some extra research would be needed to fully tackle the influence and importance of the Warner Brothers. Part 3 is covered on the CD-only Chapter on the USA 1945–75. You could replace one of these sections with a section on the USA's international role, such as:

America and the wider world

- Franklin D Roosevelt and the Second World War
- Harry Truman and the Cold War
- George W. Bush and the war on terror.

These areas would be supported by Chapters 4, 8 and 9.

An approach such as this one would allow a flexible approach to your final Controlled Assessment work. For example, the set task might be: How far has the importance of X been exaggerated in achieving Y?

With the plan set out above you could choose how and where to focus that task, depending on resources, perceived difficulty or even your perception of which Unit(s) the students enjoyed. The task as set in front of the students might be one of:

- How far has the importance of Henry Ford been exaggerated in America's economic boom in the 1920s?
- How far has the importance of Roosevelt been exaggerated in achieving recovery from the Depression?
- How far has the importance of Martin Luther King been exaggerated in achieving improvements for African Americans in the USA in the 1950s and 1960s?

It is permissible to allow students a choice between these questions in the final assessment. However, this will probably represent a significant extra workload. Alternatively, you could use some of the above questions as trial runs as they work through the course, providing ideal preparation for the processes required to succeed in the final task.

Unit 3 Option 2: A Thematic Study in Twentieth-Century History

Is this the right option for you and your students?

In this option the focus is very much on change and the nature of change. Two areas of study which are likely to prove popular are the role of women and the development of warfare in the twentieth century, but there are many other possibilities (see below).

Planning and preparation – using KS3

The revised KS3 orders which were published in 2008 encouraged a thematic approach to the study of History, and so the opportunity exists within the KS3 framework to help students develop their understanding of the concepts involved and also to explain the nature of change within a particular area. Any of the themes listed in the paragraph above would make excellent trial run themes for a KS3 unit. There are a lot of useful resources and exemplars which explore this issue. Here are just a few:

- Senior Inspector and Hodder author Tim Lomas on thematic approaches and other aspects of KS3 History:
http://www.history.org.uk/file_download.php?ts=1204285757&id=778.
- A KS3 scheme based entirely on six historical themes:
<http://curriculum.qca.org.uk/key-stages-3-and-4/curriculum-in-action/casestudieslibrary/case-studies/a-scheme-of-historical-themes.aspx>.
- Ian Dawson's Thinking History web site and his KS3 series for Hodder Education:
<http://www.thinkinghistory.co.uk/Index.html>.

Planning and preparation – the GCSE course

The most obvious starting point when planning a Unit 3 course is to consider which content area you will cover. This makes sense but, even before that stage, it may be helpful to consider what students will be asked to do in the course of the Unit and in their Controlled Assessment. Students will be required to consider:

- the changing nature of the theme being studied
- the causes of change
- the extent of change – what aspects remained unchanged
- how far change was different in different places
- whether change was different in different periods
- how far change was different for different groups.

The task will assess all of the Assessment Objectives and so students will need to demonstrate their knowledge and understanding of the content of the course they have covered as well as a familiarity and facility with source materials and an understanding of historical interpretation. The emphasis of these different areas will depend on the nature of the course you construct and also on the nature of the question.

All of these factors need to be considered before deciding on the content area to be covered. In short, the course must provide students with an experience which will allow them to answer questions such as:

- 'X steadily changed in the period Y'. How far do you agree with this statement?
- 'Changes in X were very different depending on the period you look at.' How far do you agree with this statement?
- Did the period Y see a revolution in X?
- 'The period Y saw far greater change in X than the period Z.' How far do you agree with this statement?

Many OCR schools have a successful First World War battlefields tour programme and in the past they based their coursework around this theme. There is nothing to prevent this topic moving into the new Unit 3 but it is important to make sure that students are not disadvantaged by the way your new Unit 3 course is constructed. The course must cover 40 years of the twentieth century, and while a focus on the First World War would allow you to tackle the first of the questions above, it may prove difficult to tackle the final question. Thus, you may decide to choose a different thematic approach and tackle Depth Study 15 as your Core Depth Study.

Approach based on Specification
What was the social, political and legal position of women in the 1890s?
What were the arguments for and against female suffrage?
How effective were the activities of the suffragists and the suffragettes?
How did women contribute to the war effort?
Why were some women given the vote in 1918?
What impact did the Second World War have on women?
What was the impact of the National Health Service on the lives of women?
What was life like for most women in the 1950s?
How were women discriminated against in the 1960s and early 1970s?
What factors led to changes in the roles of women?
How much change had taken place for women by 1975?

Choosing your unit

The OCR specification gives the examples of the role of women and the development of warfare. These are excellent themes which are likely to engage students, but there are plenty of other possibilities as well, such as:

- international relations
- the impact of war on civilians
- human rights
- the media
- technology
- health care
- crime
- poverty and welfare.

Customising your Unit 3 Thematic Study

Remember that the specification allows you to be flexible, so you can choose to focus on particular aspects of a theme or themes. For example, if you were planning to look at health care you might choose to focus on a subset of this, such as the impact of warfare or technology on health care. You are also not tied to a chronological approach, although you may feel that this is the most suitable planning tool. A Thematic Study on the role of women could work well using Chapters 14 and 15 of the textbook and a selective approach to the OCR specification content for the two Depth Studies.

Thematic Approach
Attitudes towards women
Women and the law/the vote
Women and war
Women and health
Women and the home and family
Women and work
How much change took place in the role of women across the twentieth century?

Unit 3 Option 3: A Modern World Study

Is this the right option for you and your students?

At the risk of stating the obvious, the greatest appeal of a Modern World Study is its contemporary relevance and resonance. The focus will be on an issue which will be in the news and as a result should provide plenty of up-to-date material in the media and online to make the study feel modern and relevant to young people taking the course. Against this is the fact that Modern World Studies require a degree of sophistication in terms of student understanding. Simplifications which may be understandable and acceptable when looking at past situations may not be helpful in the context of a Modern World Study and may even confuse students who are provided with one explanation and then find from their own researches that the explanation they have been given is inadequate.

Planning and preparation – using KS3

There is no reason why the Schools History Project specifications relating to a Modern World Study could not be customised for use as a KS3 unit in the new KS3 Orders. For schools thinking of tackling a Modern World Study the need to acquire a sophisticated understanding of both past and present makes the idea a very sensible one in order to prepare students for their GCSE Modern World Study. There is some very sensible guidance on the Schools History Project website, based on many years of Modern World Studies. This guidance is useful in preparing for and teaching a Modern World Study at GCSE, but there is also some sound advice on preparing for the Modern World Study with a KS3 Unit. The guidance can be found at http://web.leedstrinity.ac.uk/shp/teach_guides/. Another useful resource can be found on the QCA History Matters website. This resource is a case study which shows teachers in Nottinghamshire helping students develop an understanding of Irish history at various points in KS3 with a view to teaching a Modern World Study on Northern Ireland in their GCSE course. This resource can be found at http://www.qca.org.uk/history/innovating/history_matters/worked_for_me/ks3/cameo5.htm.

Planning and preparation – the GCSE course

The most obvious starting point when planning a Unit 3 course is to consider which content area you will cover. This makes sense but, even before that stage, it may be helpful to consider what students will be asked to do in the course of the Unit and in their Controlled Assessment. Students will be required to consider:

- what is happening today
- the different ways in which events are reported
- how the past and present are connected
- how an understanding of the past can help to explain present-day events.

The task will assess all of the Assessment Objectives and so students will need to demonstrate their knowledge and understanding of the content of the course they have covered as well as a familiarity and facility with source materials and an understanding of historical interpretation. It is likely that historical interpretation will be a particularly significant feature of this Unit, because in many modern conflicts history is often employed as a justification for a particular viewpoint or action, and could even be considered as a weapon in the sense that it is used to recruit for particular causes and also to motivate or even indoctrinate.

All of these factors need to be considered before deciding on the content area to be covered. In short, the course must provide students with an experience which will allow them to answer questions such as:

- Explain how X has been important in creating the present situation in Y.
- ‘An understanding of the history of X would have helped Y to avoid the problems of Z.’ How far do you agree with this statement?
- Explain why issue X is important today, and why those involved in the situation believe that history is an important part of the problem.
- Why has issue X become such an important issue over the last Y years?

Choosing your unit

The OCR specification gives as possible examples: international terrorism, the environment, events in the Middle East, events in Iraq and Afghanistan. These are all potentially powerful and motivating studies. In addition to these, you could address issues such as:

- globalisation and reactions to it
- the emergence on to the world stage of nations such as China, India and/or Brazil in the twenty-first century
- health concerns such as HIV in Africa
- poverty and inequality
- civil wars in areas such as Darfur.

Customising your Unit 3 Modern World Study

As we have already made clear, you are quite at liberty to adapt existing OCR specifications or create your own from first principles, depending on the study you undertake. For many teachers, taking on a study such as Darfur represents a major workload issue in terms of their own knowledge and in terms of locating resources. International terrorism is one possible option which is ready to teach from the OCR specification, assuming that you have not taken it as part of your Core topics. However, you may well wish to focus on only one of the groups covered in that Unit. The most obvious group to focus on is al-Qaeda for a Modern World Study. Chapter 8 is obviously written to support that section of the specification, so you should have plenty of resource material to use for this Unit.

Unit 3 Option 4: A Study in Depth

Is this the right option for you and your students?

There is much to recommend this option as a choice for the Unit 3 course. To begin with, almost all teachers with experience of Modern World GCSE courses are familiar with the construction, resourcing and teaching of Depth Studies, usually on particular countries such as Germany, Russia and the USA. Students generally like studying a topic in depth. They usually have more time to cover and review material. They can usually look at events through the eyes of people at the time and these courses often cover, to at least some degree, the experiences of ordinary people. The Modern World Depth Study can be a study of a particular society or it can address relations between different countries or groups of countries.

Planning and preparation – using KS3

There is no reason why the GCSE Modern World specifications for particular Depth Studies cannot be used as the basis for a KS3 Unit which would prepare students for a Depth Study approach at GCSE. It might even be worthwhile to cover the same country but at different periods, e.g. the USA 1919–41 in KS3 and then the USA 1945–75 at GCSE. The use of KS3 to prepare for GCSE is also explored on page ix of the introduction to this Teacher's Resource Book.

Planning and preparation – the GCSE course

The most obvious starting point when planning a Unit 3 Depth Study is to consider which content area you will cover. This makes sense but, even before that stage, it may be helpful to consider what students will be asked to do in the course of the Unit and in their Controlled Assessment. Students will be required to consider:

- different features of a society and its diversity
- social, economic, political, cultural and religious issues
- values and beliefs of different groups within a society.

The task will assess all of the Assessment Objectives and so students will need to demonstrate their knowledge and understanding of the content of the course they have covered as well as a familiarity and facility with source materials and an understanding of historical interpretation. Given that this is a Depth Study it is likely

that the use of sources will be a particularly prominent feature of this Unit. Moderators will expect to see students with a feel for sources and a sense of the period in which the sources were created. Factors like this need to be considered before deciding on the content area to be covered. In short, the course must provide students with an experience which will allow them to answer questions such as:

- Why did issue X develop in the period Y in place/region Z?
- Why was there tension between some groups in X in the period Y?
- How far did situation X change in the period Y?

Choosing your unit

The OCR specification contains a range of ready-to-use examples of Depth Studies, including

- Germany 1918–45
- Russia 1905–41
- Mao's China
- The USA 1945–75
- End of Empire 1919–69.

Any of these studies could be taken directly from the specification and studied as set out. Of course, there are plenty of other options as well. This Unit could focus on international relations, and so possible Units might be on the inter-war years or the Cold War. It is also perfectly feasible to use the British Depth Study for which you are not entered in your examination paper as your Unit 3 Depth Study.

Customising your Unit 3 Depth Study

As we have already made clear, you are quite at liberty to adapt existing OCR specifications or create your own from first principles, depending on the study you undertake. For example, you may choose to change the exemplars given in the End of Empire Depth Study, or add to them, or simply focus on one area such as Indian independence. This could be particularly interesting to teachers who teach large numbers of students with family roots in the Indian subcontinent. Each of the Units here is covered in the textbook or on the CD-ROM chapters.