

CHAPTER 5

Strategies to Improve Schools in Mexico: Guidance on Implementation

The previous chapters provide a set of specific policy recommendations to support improvements in teacher quality and school effectiveness in Mexico based on international analysis and evidence and its contextualisation to Mexico. Lessons from OECD country experiences in implementing reforms successfully show that the quality of the analysis underlying a reform can positively affect prospects for both adoption and implementation, as well as the quality of the policy itself. In addition, evidence suggests that the influence of policy-oriented research, however diffuse and indirect, can be quite powerful over time, as it gradually reshapes the consensus concerning a policy regime. This is the aim of these recommendations: to provide a solid analytical base that can contribute to consensus building and effective reforms over the long run.

CONDITIONS FOR SUCCESS IN IMPLEMENTING THESE STRATEGIES

The difficulties in implementing reforms in education cannot be underestimated, as the system of provision is large and costly and the governance is complex. There are lessons that can be learned from the analysis of the implementation of policy reforms across OECD and partner countries (OECD, 2010a):

First, that the external shock of the 2006 PISA results, and other international comparative data summarised in Chapter 2, provides an important stimulus for change. By establishing the *Alianza* and commissioning the OECD to provide support to Mexico in its education policy reforms, the government has recognised that the status quo is demonstrably unsustainable. The cost of inaction would be to place Mexico at an increasing disadvantage in an evolving global knowledge society and have severe adverse consequences in terms of economic performance, the level and distribution of income, social cohesion and development. The circle of stakeholders with an interest in departing from the status quo, which is reflected in parts of government, many of the states and among the social partners, is broadening, making it more difficult for vested interests to persist in defending it.

Second, international experience shows the importance of consensus as a precondition to educational reform, as reviewed in Chapters 1 and 2. Achieving consensus needs open and effective communication and consultation, with clarity of purpose. Reforms can be impossible to achieve when a major stakeholder opposes them. Building a consensus can only be done internally, although external partners can provide evidence and moral support.

Third, the role of external actors within Mexico is important. The OECD and the World Bank are two complementary examples which can provide international comparisons, benchmarks and expertise together with access to resources in support of the reforms. There is also considerable international expertise available within both North and Latin America where different governments face common challenges.

The OECD Mexico Steering Group would add a fourth point. The Steering Group has repeatedly encountered evidence of high levels of commitment to change within Mexico, with many examples of initiatives in the states which have the potential to be further developed and scaled up. This suggests a need for greater decentralisation through rebalancing of the relative roles of state and federal governments as communities and schools become increasingly the focus for change.

Finally, reforms need to recognise and overcome capacity constraints, including lack of knowledge and professional know-how and inadequate institutional arrangements to support implementation.

A SUGGESTED WAY FORWARD WITH THE RECOMMENDATIONS

The OECD Steering Group has provided analysis, recommendations and workshops to engage stakeholders across Mexico, but local ownership must discern what is most urgent and feasible, and how to further develop the details of implementation. This implies that successful reforms may require significant investment in staff development. For Mexico, a strategy to this effect has been the OECD-Harvard Seminar for Leaders in Educational Reform (Box 2.3), which combines country visits with capacity building. But this is only part of the strategy.

To complete the transition from OECD to Mexico it is necessary that a national group of stakeholders reflects on and takes ownership of the recommendations and adapts them. Experience from international organisations providing support for policy implementation shows that transfer of knowledge and strategic management capacity will be more effective when there is collaboration and engagement from local stakeholders (Brinkerhoof and Derik, 1996). Policy implementation can be improved when there is a common understanding of the diagnosis and the proposed policy options and ownership of the proposals. In addition, policy implementation improves not simply when ownership is generated for the reforms themselves, but also when ownership is fostered for measures to improve implementation capacity.

Before offering more specific suggestions on organising for implementation, the OECD Mexico Steering Group on School Management and Teacher Policy offers the following broad advice on planning. This is done with some caution, knowing that the Mexican context is complex and that its knowledge of the cultural and political landscape is limited. That said, several Steering Group members are from Mexico and others have held senior-level governmental positions in their own countries and believe their experience might be relevant.

The first piece of advice is that, while one cannot do everything at once, it is important to understand that these recommendations are interconnected and derive from a systemic view of what Mexico needs to do to improve the quality of teaching and learning across the country. This means that while working on any single piece of the puzzle, one has to keep in mind its relation to the other pieces and keep the whole picture in view.

The second suggestion is that, as in any federal schooling system, it is critical to engage state leaders as partners in every stage of the reform process. This does not mean that every state should be expected to adopt these recommendations in exactly the same way or implement them identically. In fact, one of the advantages of a federal system is the opportunity it offers for different states to take the lead on different aspects of these recommendations, and to build mechanisms for states to learn from one another rather than each having to reinvent the wheel.

The third point is that, given the focus of these recommendations on teachers and teaching, it is absolutely essential to engage all key players as full partners in implementing these recommendations. The recommendations are consistent with the goals outlined in the Alliance for Quality Education signed between the Government and the National Education Trade Union in 2008. The Ministry and all education actors have a stake in creating a much stronger professional teaching culture in Mexico.

The fourth point is to make the best use of current initiatives to provide extra leverage for change. In particular, the OECD believes that a number of the recommendations align with current reforms. There is a particular opportunity to achieve close alignment between the objectives of the new cycle of the PEC programme ('PEC 2') and the recommendations for school leadership, management and social participation. The common theme is improving the quality of schools so as to raise educational standards. The PEC programme alone is not sufficient to improve leadership and quality in all schools, but has the continuing potential to be a powerful, school-focused lever for improvement within each state of Mexico.

RECOMMENDATION 15: Create an Implementation Working Committee and look for broader support across other sectors of society

The OECD suggests the creation of a Working Committee in Mexico for knowledge transfer, to study viability, further contextualisation if needed and to provide guidance to SEP on potential implementation of the OECD recommendations. This committee should be composed of relevant policy makers from the Education Ministry (SEP), highly respected members from academia, the public sector, teachers and civil society. Similar structures can be created in those states that are willing to pursue the OECD recommendations. Feedback mechanisms

should be set up to guarantee an optimal coordination of action and priorities between these actors. The main task of the working committee should be to develop a specific implementation plan, considering the priorities and already existing initiatives in Mexico and with the work of the states committees, also including those related to the National Educational Sector Plan, the state programmes of education, the *Alianza* and the CONAEDU agenda.

As response to this recommendation, in March 2010, SEP established a Working Committee to analyse these recommendations, and develop a plan for moving forward with implementation planning. The Steering Group is pleased that SEP acted promptly and that a broad-based committee with representation from the states as well as the Ministry is already at work. This Committee seems well structured to serve as an umbrella group under which a series of more focused work groups could be organised. An immediate challenge facing the Committee is to be able to guide the effective implementation of some of these recommendations before the end of the current federal administration. A mid term challenge is to guarantee the continuity of their work after the end of the on-going government's mandate.

Organising for implementation: create working groups

Aiming to do progress on the implementation of the recommendations, the Steering Group recommends that the Ministry empower the Working Committee to establish work groups, for example in the following initial areas, each with a clear charge and the responsibility to develop a work plan with timelines and budget:

1. Standards for a) teaching and b) school and system leadership
2. The *Normales* and other initial teacher preparation (ITP) institutions
3. Teacher development and evaluation
4. School directors and mentor teachers
5. Autonomy, school funding, school partnerships and social participation.

While these proposed work groups do not encompass all the changes the Steering Group recommends, these are the topics in most urgent need of attention and action. In our view the work of the Standards group should be at the top of the list, for everything else rests on getting the right standards in place.

The Standards Work Group

The Steering Group recognises that there is already work underway to develop national curriculum or learning standards for students. These standards would spell out what all students are expected to know and be able to do in the core academic subjects at key grade levels. With such standards in place, it then becomes imperative to ask, "What must teachers know and be able to do in order to help all students meet these standards?" Standards for teachers can be written at different levels of performance – what experienced teachers should be expected to know and be able to do in the classroom differs from what we would expect of beginners – but the core principles of effective teaching practice should be consistent. Without clear standards that define effective teaching practice it is impossible to put in place a fair and consistent process of teacher evaluation, for there must be clear agreement among those doing the evaluation of the standards of practice against which teachers are being judged.

Similarly, developing clear leadership standards for directors is the essential first step in improving the quality of school leadership, for this the standards need to be applied in the recruitment, selection, training, and development of leaders within the school system. Although the people charged with the development of standards for leaders may not be the same as those responsible for the development of teacher standards, the underlying principles of standards development for the two roles are sufficiently similar so that the work on each should probably occur within the same work group.

Fortunately, much good work has been done on standards for teachers and leaders in other countries, and it would be unwise not to take advantage of that work. Whatever standards Mexico decides to propose these will need to go through a substantial vetting process in the field and will inevitably be refined over time, so the OECD Steering Group recommends that the Standards Work Group move quickly to select a set of provisional standards for teachers and leaders and not spend inordinate time seeking perfection.

The Normales and Initial Teacher Preparation Work Group

The first step in strengthening the *Normales* must be to update and make more rigorous the accreditation standards for these institutions, and then to establish a regular review cycle. Given the likely resistance in at least some states, it is critical that the accrediting body have sufficient independence and authority to be able to withstand political pressure to maintain the *status quo*.

Unless the weaker institutions believe there is a risk they will be forced to close if they don't meet standards, they are unlikely to initiate the difficult work of raising their own teaching standards, strengthening their faculty appointment and review processes, modernising their curriculum, and building stronger working relationships with schools. Until visible reforms are underway, it will be difficult for them to raise admission standards and attract stronger students. We would also encourage early development of the state Academic Councils in order to help the *Normales* accelerate the reform process.

In the short term, measures should be taken to improve opportunities for teachers in the *Normales* to participate in continuous professional development and in research projects. There is a need to upgrade and broaden the skills and knowledge of these faculty members so they will be better equipped to deal with both content and pedagogy. Further research on teacher education and professional development should be undertaken through funding projects that are jointly designed by faculty from the university sector as well as the *Normales*.

Teacher Development and Evaluation Work Group

The report on teacher evaluation by Mancera and Schmelkes (2010) recommends the following six steps:

- Establish a leadership structure and clear rules for the governance of the evaluation system.
- Establish a technical unit that will be responsible for the implementation of the evaluation.
- Develop standards for teaching (in agreement with Recommendation 1).
- Design an in-service teacher evaluation model that gradually evolves from a purely formative system to one that combines formative and summative aspects.
- Define the instruments for the in-service teacher evaluation system.
- Develop a support system for school-based professional development that leads to the improvement of teacher practice, and a system that monitors this improvement (in agreement with Recommendations 6 and 7).

The Steering Group endorses these steps and recommends that the Work Group establish a firm timeline for the development of the evaluation instruments, the selection and training of evaluators, and the design of the support system for school-based professional development with mentor teachers and coaches. Active and committed states should be recruited to pilot the new teacher evaluation system.

The Steering Group believes it is feasible by 2012 to have a formative teacher evaluation system in place with appropriate instruments and trained evaluators in clusters of schools in at least ten states. The goal should be to have formative evaluation systems in place in 25 states by 2015, and all states by 2020. The development of a support system for school-based coaching and mentoring and a monitoring system to assure quality should accompany the implementation process. Summative evaluation should follow, perhaps as early as 2015 in those

states that are furthest along. In order to accomplish this, the Work Group should engage key stakeholders early on to ensure sufficient buy-in to enable the long-term establishment of a comprehensive teacher evaluation system, ideally through the enactment of enabling legislation.

Directors and Mentor Teachers Work Group

Once school leadership standards are in place, this Work Group should develop a process and criteria for identifying teachers with leadership potential and work with universities and other relevant leadership development organisations to ensure that these candidates have access to high-quality training programmes, including internships under the tutelage of talented school leaders. The Work Group should also identify and promote programmes to upgrade the skills of incumbent directors. The Work Group should develop and promulgate a model process for the selection of new directors, one that engages parents and other school council members and ensures that candidates meet the criteria established in the leadership standards, as suggested in Chapter 4.

The Steering Group believes it would be a significant mistake to launch a teacher evaluation programme without first having in place a well-trained cadre of mentor teachers and directors. The reason for focusing on mentor teachers as well as directors is that the first priority in putting in place a teacher evaluation system should be to assure that no teacher is given a permanent post who cannot meet the new professional standards. In order to begin there, however, it is critical for fairness and transparency that probationary teachers have access to mentoring and support before being required to meet the standards. Given the stakes involved, any new teacher evaluation programme should be rolled out slowly and carefully and take place first in schools where directors and mentor teacher have been identified and trained.

Every new teacher should be given a mentor whose responsibility is to continuously support the beginner during his/her first year of service. The mentor should focus on coaching, advice and support and not be involved in the process of formal evaluation. The mentors should be selected based on their own successful practice and their ability and willingness to work with beginning teachers. Preferably, they should work in the same school as the beginner, but where this is not possible they should at least be in the same district or region.

We would leave to a later stage the evaluation of teachers who already have obtained permanent status. Among the reasons it is important to have a well-developed array of coaching and other locally based professional development supports in place before implementing teacher evaluation programmes more broadly is that there is little benefit in identifying weaknesses in teacher practice if teachers don't have access to good programmes to address those weaknesses.

Autonomy, School Funding, School Partnerships and Social Participation Work Group

This Work Group should be charged with defining a research and development agenda for school financing, governance, organisation, and management. More specifically, this group should be given the resources to support experimentation in different forms of collaboration among schools, and different degrees of school-level autonomy in selecting staff and controlling other resources available to schools. This group could also encourage experimentation with different forms of social participation in the governance of schools. In a country with thousands of small, isolated rural schools and an undersupply of well-trained, highly effective school leaders, it is critical to find ways to share resources across schools and extend the influence of the most skilled and successful school leaders. This Work Group should be tasked with supporting bold innovation to address these challenges, and with evaluating the success of the various experiments undertaken in response to its call for new forms of collaboration in school organisation, management, and governance.

A final strategy: create a guiding coalition for education reform

Most of the work needed to implement the recommendations outlined in the previous two chapters is technical in nature and can reasonably be assigned to a set of Work Groups operating under the general supervision of the SEP Working Committee. But education reform is inherently a political exercise, especially if it involves fundamental institutional change. Without powerful and sustained political leadership, the deep structural changes needed in the way teachers and school leaders are recruited, trained, developed and evaluated are unlikely to be realised.

The early 20th century French Prime Minister Georges Clemenceau once said that war is too important to be left in the hands of generals. The OECD Steering Group similarly believes that education reform is too important to the future of Mexico to be left educators alone with this task. We therefore urge the creation of a broader “guiding coalition” of top political, corporate, university and civil society leaders that will step forward and take responsibility for championing these reforms in the public arena, advocating for adequate and equitable funding, and holding SEP and SNTE and other education organisations accountable for results. The recommendations outlined in this report will require some investment. There are costs involved in implementing each of these recommendations that will be new to the Ministry and the states. But without a highly skilled and motivated workforce of teachers and school leaders capable of dramatically improving outcomes for Mexico’s young people, the nation’s ability to increase economic opportunity and social mobility will be severely compromised. Recent studies published by the OECD show that improving student learning can have dramatic effects on Mexico’s GDP in the medium and long term (OECD, 2010b). Failure to invest in the comprehensive reforms the Steering Group is recommending in teacher policy and school leadership would, in the long run, be much more costly to Mexico’s future than the investments it is recommending now.

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ANNEX A

AUTHORS' BIOGRAPHIES

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Ben Levin is Canada Research Chair in Education Leadership and Policy at the University of Toronto's Ontario Institute for Studies in Education (OISE). He has served as Deputy Minister for the Ontario Ministry of Education twice, on an interim basis from 2008 to 2010 and from 2004 to 2007. He has held leadership positions in a wide variety of organisations in the public and non-profit sectors and his career includes distinguished service in government and academia. From 1999 until September 2002 he was Deputy Minister of Advanced Education and Deputy Minister of Education, Training and Youth for Manitoba, with responsibility for public policy in all areas of education and training. Ben Levin is widely known for his work in educational reform, educational change, educational policy and politics. His work has been international in scope. His writings examine broad areas of education policy. In 2003, he was the recipient of the Whitworth Award for achievement in educational research from the Canadian Education Association, and in 2004 he was awarded the Lieutenant-Governor's Medal for Public Administration in Manitoba. He holds a B.A. (Honours) from the University of Manitoba, an Ed. M. from Harvard University and a Ph.D. from OISE. He is a native of the City of Winnipeg, but currently lives in Toronto.

Peter Matthews is an education consultant and visiting professor at the Institute of Education, University of London. He is an expert in school and system leadership and education evaluation. He specialises in the evaluation of national policies for schools and works mainly for governments or national organisations in the UK and other states. In England, he is currently evaluating programmes including the appointment of National Leaders of Education, and is contributing the revision of the qualification for school principals. Recent international projects include evaluations for the OECD of improving school leadership in Victoria, Australia, and analysis of school performance in the light of PISA results in Mexico and a case study on attracting, training and retaining teachers in Germany. He has led or contributed to educational evaluation and school improvement projects in Portugal, South Africa, the Gulf States, Bermuda and Italy. Dr. Peter Matthews is also a Schools Adjudicator, appointed by the Secretary of State to take decisions on school reorganisation proposals and admissions.

Sylvia Schmelkes has 33 years' experience in educational research. She is currently director of the Research Institute for the Development of Education at Universidad Iberoamericana, Mexico City. Her research fields are quality of basic education, rural education, intercultural education and education for adults. She published about 200 articles, chapters in books, and books. Among the latter: *Hacia una Mejor Calidad de Nuestras Escuelas*, OAS (1995), SEP (1995), 100,000 copies printed; *The Quality of Primary Education in Mexico: A Study of Five Zones* (1996), París IIEP-UNESCO; *Educación de Adultos: Estado del Arte. Hacia una Estrategia Alfabetizadora para México*, México: INEA (1996); *La Educación de Adultos y las Cuestiones Sociales*, a selection of her works on adult education since 1978, Pátzcuaro: CREFAL (2008). She has been consultant to UNESCO, UNICEF, OAS, OECD, the World Bank and the Secretary of Education in Mexico. She chaired the Governing Board of the Centre for Educational Research and Innovation of OECD, 2002 to 2004. She received the National Award María Lavalle Urbina for Education in 1998 and Comenius Medal from UNESCO and the Czech Republic Ministry of Education in 2008. She has been a member of the National System of Researchers since 1993 (National Researcher, Level III).

Robert Schwartz currently serves as Academic Dean and Bloomberg Professor of Practice at Harvard Graduate School of Education. He joined the HGSE faculty in 1996 as a lecturer, and from 1997-2002 also served as the first President of Achieve, Inc, a national non-profit organisation founded by a bipartisan group of governors and corporate leaders to help state leaders improve their schools. From 1990-1996 Schwartz directed the education grant making programme of the Pew Charitable Trusts, one of the nation's largest private philanthropies. Earlier in his career Robert Schwartz held a wide variety of positions in education and government: high school English teacher and director; Education Policy Advisor to the Mayor of Boston and the Governor of Massachusetts; Assistant Director of the National Institute of Education; Special Assistant to the President of the University of Massachusetts; and Executive Director of The Boston Compact, a public-private partnership to improve access to higher education and employment for urban high school graduates. Robert Schwartz has written and spoken widely on standards-based reform, public-private partnerships, high school reform, and the transition from school to college and career. He has degrees from Harvard College and Brandeis University.

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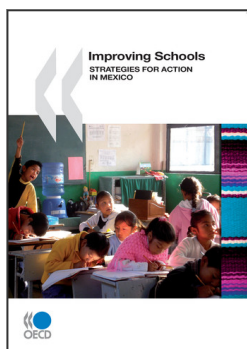
(CERI), and he was the co-coordinator of the OECD/CERI *Spanish Speaking Seminars* in 2004/05. He has also collaborated with other projects about innovation technologies and neurosciences. He was the co-editor of the publications *Innovating to Learn, Learning to Innovate* (OECD, 2008); the OECD *The Nature of Learning: Using Research to Inspire Practice* (OECD, 2010); and co-author of *Teacher Evaluation and Examples of Country Practices* (Santiago and Benavides, 2009). Before collaborating at the OECD, he was a journalist in Mexico and he has collaborated with several development and humanitarian non-government organisations in Africa and Europe. He obtained a M.Sc. in Political Sciences and Development at the *IEP Sciences-Po Paris* (Rotary World Peace Scholarship Award) and B.A. in International Relations at the Monterrey Tech – *ITESM* (Academic Excellence Award).

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Hunter N. Moorman provides consulting services in leadership, education reform, and organisation development to educational, governmental, and non-profit organisations. He has held consultancies with numerous federal agencies, state governments, and private and non-profit firms in the U.S. and with the OECD in Paris, France. He recently retired from the Institute for Educational Leadership (IEL) in Washington, DC, where he was Director, Education Policy Fellowship Program (EPFP) and Senior Associate, Leadership Programs for six years. Moorman is also retired from the federal civil service, following 26 years with the U.S. Department of Education. His responsibilities there, at the National Institute of Education and then at the Office of Educational Research and Improvement, included directing national education research programmes, leading a programme of school improvement networks, and managing a national leadership development programme, LEAD. In collaboration with the Institute for Educational Leadership, he directed the National LEADership Network during 1987-1990. Moorman earned his certificate in Organisation Development from Georgetown University, an M.P.A. from The George Washington University, and a B.A. in Government from Harvard College. He was awarded the Secretary of Education's Certificate of Appreciation in 1996, the American Psychological Association's Presidential Award in 1996, the Institute for Educational Leadership's National Leadership Award in 1991, and the National Institute of Education Director's Award for Sustained Excellence in 1980. Hunter is Vice-Chair of the Board of Directors of the Foxfire Fund, Inc, and a member of the Middlesex School Alumni Association Board of Directors.



From:
Improving Schools
Strategies for Action in Mexico

Access the complete publication at:
<https://doi.org/10.1787/9789264087040-en>

Please cite this chapter as:

OECD (2010), “Strategies to Improve Schools in Mexico: Guidance on Implementation”, in *Improving Schools: Strategies for Action in Mexico*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/9789264087040-7-en>

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