

## Chapter 4. Supporting teachers and schools

*This chapter analyses education reforms adopted by Mexico from 2012 focused on strengthening the quality of the teaching profession and schools to enhance quality and equity in education provision. The chapter describes and reviews the teacher professional service (Servicio Profesional Docente) and the School at the Centre strategy (La Escuela al Centro) as the two main pillars to support better learning for all students in Mexican schools. It concludes with a set of insights on how these policies can best reach schools and have a positive impact on student learning.*

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The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

## Introduction

Education policy and school systems need to adapt to the social and economic changes of a world continuously evolving. They need to make sure that all students are equipped with the skills, knowledge, and values to succeed in life and work regardless of their background. Recent technological changes, like digitalisation, represent both opportunities and challenges in preparing students in school and to be lifelong learners (Schleicher, 2016<sup>[1]</sup>).

Equipping students with these skills requires innovation and change in the traditional approaches towards teaching and learning. Mexico's New Educational Model and curricular approach aim to focus on developing these new skills for all students (see Chapter 3). As teachers are among the main actors that shape the context for student learning, educational policy and practice needs that recognise the essential role that teachers play in transforming classrooms and support them in their endeavour (Schleicher, 2018<sup>[2]</sup>).

Effective leadership at the school and system levels and school support must be in place for teachers to be able to implement this vital shift in pedagogical approaches and encourage them to build a collective professional approach to improving student learning. Improving teaching practices in the classroom (and in general, of the teaching profession) also requires developing the school as a learning community that provides the right environment for teachers in their challenging tasks.

Recognising their importance, one of the main areas of focus of the recent education reforms in Mexico is improving the quality of the teaching profession. This chapter analyses how these reforms contribute to improving quality and equity in education through better teaching in schools across Mexico.

The chapter is divided into three sections. Following this introduction, the chapter describes the main elements of the School at the Centre strategy (*La Escuela al Centro*) and those related to the Teacher Professional Service (*Servicio Profesional Docente*). The second section discusses progress made in these areas, and analyses it in relation to research and international relevant practices. The chapter concludes with insights on how these reform strategies can be enhanced in terms of policy design and implementation to promote effective education quality and equity at the school level and in the classroom.

## Policies targeting schools and teachers

This section describes recent changes to improve schools and the teaching profession in Mexico: the School at the Centre strategy (*La Escuela al Centro*) and the Teacher Professional Service (*Servicio Profesional Docente*, SPD).

### *Schools as learning communities: Placing schools at the centre*

School organisation and leadership are key to support the development of a high-quality teaching profession. For school systems to flourish, they require focusing not only on individuals but on *professional capital* which encompasses three kinds of capital: “*human capital (the talent of individuals); social capital (the collaborative power of the group); and decisional capital (the wisdom and expertise to make sound judgments about learners that are cultivated over many years)*” (Hargreaves and Fullan, 2013<sup>[3]</sup>). This includes recognising teachers' individual pedagogical skills and practice, and their continuous learning throughout their career as well as the articulated surroundings that

promote collaboration and decision making, towards improving student learning in their schools and beyond.

As in most OECD countries, Mexico's schools have a staff structure with different figures who share pedagogical and administrative responsibilities. Each school usually has:

- One school leader, sometimes helped by a deputy director in lower secondary schools.
- A number of teachers that vary depending on the number of students.
- Additional staff in larger primary and lower secondary schools. This staff does not have a regular teaching load and used to be in charge of any type of support functions before the creation of the Teacher Professional Service (SPD) (Santiago et al., 2012<sup>[4]</sup>).

Mexico has taken on the challenge to transform its education system, recognising the important role of the school as an enabling institution for systemic change. The School at the Centre strategy (*La Escuela al Centro*) was created by the Secretariat of Public Education (*Secretaría de Educación Pública*, SEP) to give coherence to Mexico's 2013 reform priorities at the school level, and reorganise existing school support programmes accordingly. Its objective is to reduce the bureaucratic load for schools and to guarantee that they have the skills and resources to foster active participation and collaboration within the school community, always with the purpose to enhance educational outcomes (SEP, 2018<sup>[5]</sup>). The strategy covers six lines of intervention.

First, it aims to turn schools into learning communities with a less bureaucratic load for both school principals and supervisors. In this regard, the programme aims to:

- Guarantee that each school has the basic staff required (one teacher for each group and one school leader) and provide larger primary and early childhood institutions with additional staff<sup>1</sup> to reduce the administrative load of school leaders so they can focus more on their pedagogical leadership role.
- Support the activities undertaken by supervisors. To make them more effective in their responsibility for co-ordinating technical assistance for their schools, the programme seeks to develop their skills for pedagogical accompaniment and reduce the number of schools under each supervisor responsibility. It also assigns to them two Technical Pedagogical Advisors (*Asesores Técnico Pedagógicos*, ATPs) and one administrative assistant (*apoyo de gestión*), or three new posts in total.

Second, the programme aims to improve the provision of direct resources for the schools:

- Schools will directly receive a budget according to the number of students it has and to their level of educational lag.
- Resources are allocated through two programmes: the Education Reform Programme (*Programa de la Reforma Educativa*, PRE) and the Full-Time Schools programme (*Escuelas de Tiempo Completo*, ETC).
- Schools can decide their expenditure based on their own priorities, with the community's participation.

Third, the programme aims to reinforce support for the teaching staff in schools with the following initiatives:

- Strengthening the School Technical Councils (*Consejos Técnicos Escolares*, CTE) by introducing monthly meetings focused on improving all students learning (with a special focus on students at risk) and enhancing teaching quality through peer learning and schools exchange sessions. Teachers and their principal collaborate to establish and monitor the school's improvement route (*Ruta de Mejora*). The CTE follows up on academic and pedagogical issues, using monitoring indicators. For instance, the Early Alert System (*Sistema de Alerta Temprana*, SisAT) uses indicators such as attendance and reading comprehension (among others) to identify students at risk of lagging behind and dropping out. Each school can decide the day of the month and time for its CTE meeting, for more flexibility.
- Strengthening supervisors' pedagogical function and skills by giving them training based on peer exchange and learning, and specific tools for technical accompaniment as class observation and monitoring of student learning (more than 18 000 supervisors have participated in certification programmes designed specifically for the function). The strategy also aims to reinforce the Zone Technical Councils (*Consejos Técnicos de Zona*), where supervisors and school principals have regular meetings, into a place of collective learning.
- Reengineering the pedagogical team that accompanies and supervises the school: the Technical Support Service to Schools (*Servicio de Asistencia Técnica a la Escuela*, SATE).
- Providing physical and virtual spaces where teachers can share pedagogical resources and experiences.

Fourth, harmonic school environments are encouraged to:

- Foster equity. Summer schools will be provided to offer cultural and sports activities as well as courses for strengthening academic skills.
- Work on developing students' socioemotional skills at school and home to build a harmonic environment.

Fifth, the School at the Centre suggests initiatives to increase the time allocated to learning activities, including:

- The school community, exercising its own autonomy, will make its own decisions about the organisation of time in the school (following the official calendar produced by the SEP) to offer the maximum learning time to students according to the context of school and student needs (more information in Chapter 3).
- The Full-Time Schooling programme (*Programa Escuela de Tiempo Completo*, PETC) will be expanded to more schools (more information on the programme in Chapter 2).

Sixth, it is essential to promote community engagement. Thus, the programme promotes:

- A more prominent role for the School Social Participatory Councils (*Consejos Escolares de Participación Social en la Educación*) which aim to facilitate co-operation among all those who are part of the school community.

- The representation and participation of parents, teachers, principal and other school stakeholders in the councils, to secure accountability and transparency (SEP, 2018<sup>[5]</sup>).

#### Box 4.1. The Technical Support Service to Schools (SATE)

The Technical Support Service to Schools (*Servicio de Asistencia Técnica a la Escuela*, SATE) has been designed to support teachers and schools in Mexico. The main goals are to:

1. Improve teaching practices, based both on individual and collective experiences and knowledge, as well as on the learning needs of the students, to encourage thoughtful decision making in the work undertaken in the classroom and the school, within a framework of equity, inclusion and recognition of diversity.
2. Support the identification of the needs of continuous training of the teaching and management staff to be addressed by the educational authorities.
3. Strengthen the functioning and organisation of schools, through the use and promotion of the school improvement plan, school leadership, CTE and the collaborative work in the school community, within a framework of management autonomy.
4. Support teachers (as a group) in the practice of internal evaluation, making it a permanent and formative practice that strengthens and contributes to a well-informed decision-making process that improves student learning.
5. Support teachers (as a group) in the interpretation and use of external evaluations, taking into account their results as inputs for the analysis of the educational work that is carried out with students in the schools and the definition of actions to improve processes and learning outcomes.
6. Deliver counselling and technical pedagogical support for schools in Basic Education aiming at the improvement of student learning, teaching and school leadership practices, and school organisation and operation.

The SEP draws up guidelines to organise the SATE, and state education authorities operate the service, which is co-ordinated by zone supervisors and implemented by ATPs. The number of schools that each SATE covers varies according to the size of the supervision zone. Each SATE is composed of:

- One school supervisor.
- Two technical pedagogic advisors (ATPs) appointed by promotion.
- One ATP appointed by recognition (*reconocimiento*), in the case of pre-school and primary education. Three ATPs in the case of secondary education.
- One ATP with technical operations functions supporting other schools.

Following the General Law of the Teacher Professional Service (*Ley General del Servicio Profesional Docente*, LGSPD), supervisors and ATPs are selected through the promotion mechanism (*promoción*). They must comply with the professional standards (*perfil*) and pass the examination for promotion (*concurso de oposición para la promoción*).

Source: SEP (2018<sup>[5]</sup>), *La Escuela al Centro*, [https://basica.sep.gob.mx/escuela\\_al\\_centro/](https://basica.sep.gob.mx/escuela_al_centro/) (accessed on 22 August 2018).

The model of *La Escuela al Centro* reflects Mexico's intention of building change and innovation capacity within schools and local governments as a key enabler to transform schools, supporting the development of a stronger teaching workforce and improving the education system (SEP, 2018<sup>[5]</sup>). Principals, teachers and other pedagogical support staff such as Mexico's new SATE (*Servicio de Asistencia Técnica a la Escuela*) are considered active agents of this transformation with the schools (Box 4.1).

### *The Teacher Professional Service*

Developing quality teachers is essential for improving the quality of learning in any country. In order to support its teachers, student learning, and quality and equity in education, Mexico has been working on strengthening teaching and school leadership through comprehensive reforms in recent years (OECD, 2015<sup>[6]</sup>). OECD Teaching and Learning International Survey (TALIS) data shows that before 2013, almost a quarter (24%) of teachers in Mexico reported not feeling prepared to perform their work (the third largest share of teachers across countries), compared with the TALIS 2013 average of 7%. Previous to the reform, the educational professions lacked transparency in career advancement opportunities; professional profiles were not established and professional performance was seldom appraised other than in voluntary career advancement schemes; and teachers were in need of more support in their career. An OECD report concluded the following about the teaching profession (OECD, 2012<sup>[7]</sup>):

- **Selection process:** Before 2008, only 13 states used licensing mechanisms when selecting teachers; the remaining 19 states allocated posts mainly upon the acquisition of a teacher's diploma. The mechanisms for the selection of teachers were not transparent and sometimes perceived as unequal, corrupt or highly politicised. A National Teaching Post Contest (*Concurso Nacional para el Otorgamiento de Plazas Docentes*) started in 2008 as the first step in a process to enhance teacher quality by making teacher selection more competitive, merit-based and transparent. By 2012, the OECD report already pointed out some clear pending issues. First, all teaching posts were still not open to competition and the system for allocating teachers was only based on teacher choice, with no opportunity for schools either to express their needs or to get staff that responded to them. Particularly, becoming a school leader did not require any specific skills and leadership positions were not subject to any selection process other than being an experienced teacher. It was also of concern to observe that in 2008 and 2009 successively, a large number of candidates scored low on the National Teaching Post Contest and that without improving their knowledge and skills, newly qualified teachers who scored repeatedly lower than the minimum score were still potentially eligible for a permanent post.
- **Professional development:** The programme of professional development (National Training Catalogue) was dispersed across a range of different providers and organisations. What is more, options for developing professional skills and knowledge were not diversified enough to respond to schools' or teachers' needs. School-based training opportunities existed but were still scarce.
- **Career advancement and appraisal mechanisms:** Before 2013, some teacher career guidelines (*Carrera Magisterial*, 1993) determined the conditions under which outstanding teachers, school leaders and pedagogical support staff could be acknowledged without having to change position. This promotion mechanism was voluntary and offered career and salary advancement opportunities based on

individual teacher performance. However, there was no compulsory, standard-based appraisal mechanism in place to guarantee the quality of pedagogical practices in schools: once in position, teachers and other education professionals could stay with no further appraisal. Furthermore, there were no clear standards on what it is to be a “good” teacher or an effective school leader.

In 2013, the General Law of the Teacher Professional Service (*Ley General del Servicio Profesional Docente*, LGSPD, 2013) established a framework for education professionals: teachers, school leaders (or principals) and vice-principals, co-ordinators, supervisors, inspectors and technical pedagogical advisors (*asesores técnico-pedagógicos*, ATP). The Teacher Professional Service (SPD), which enacts the LGSPD, sets out the bases for selection, induction, promotion, incentives and tenure possibilities, as well as for stimulating continuous professional training for educational staff.<sup>2</sup> Its main purpose is to guarantee the adequacy of the knowledge and capacities of teaching staff, school leaders and supervisors in basic and upper secondary education (LGSPD, 2013). Two processes are at the core of the SPD: professional development and appraisal, both formative and summative.

Specifically, the objectives of the SPD are to:

- Regulate the teaching activity in pre-school, primary and secondary education.
- Establish the profiles, parameters and indicators for the teacher professional service.
- Regulate the rights and obligations derived from the professional development service.
- Ensure transparency and accountability in the professional development service.

The Teacher Professional Service aims to bring into a coherent whole several elements of the teaching profession, also rewarding good performance and improvement and providing incentives for both schools and individuals (OECD, 2018<sub>[8]</sub>). In this sense, the SPD:

1. Defines the profiles, parameters and indicators for teachers (*Perfil, Parámetros e Indicadores para Docentes y Técnicos Docentes*), for the leadership roles (principals, vice-principals, co-ordinators) and for supervisors, and pedagogical profiles for ATPs (*Perfil, Parámetros e Indicadores para Personal con Funciones de Dirección, de Supervisión y de Asesoría Técnica Pedagógica*).
2. Establishes the framework for a career perspective for the teaching profession with clear criteria for entry, permanence, promotion and recognition in transparent conditions:
  - **Entry and selection process:** the entry new process aims to incorporate suitable candidates to the educational workforce through a clear selection process. It consists in passing the three steps of the entrance examination (*Concurso de Oposición para el Ingreso*); going through probation phases that include training and support, then mentoring for two years; being initially appointed for six months (*nombramiento*) and then reaching final appointment (*nombramiento definitivo*). After the first year, a diagnostic appraisal (*evaluación diagnóstica*) takes place, and mentoring and support are aligned to help new teachers improve their practice. A second appraisal focused on performance (*evaluación del desempeño docente*) is compulsory during the

second year, which determines whether the candidate can continue his or her career as a teacher. As of 2016, candidates can come from higher education institutions other than the teachers' colleges (*normales*) which may help to diversify and improve the offer of possible future teachers, although care should be taken to ensure that candidates from all qualifying institutions acquire the necessary set of skills and knowledge required to enter the profession.

- **Permanence in the profession:** teacher performance appraisal for in-service teachers (*evaluación de desempeño de los docentes en servicio*) defines the conditions under which in-service teachers can retain their position in front of the classroom. The performance appraisal model has evolved towards three components: a report on the fulfilment of professional responsibilities; a teaching project<sup>3</sup> that includes pedagogical planning, intervention and reflection on practice (60%); and a sit-in exam on pedagogical knowledge, curriculum and disciplines, and legal and administrative knowledge related to the profession (40%).
  - **Promotion and trajectory in the profession** (*promoción en el servicio y trayectoria profesional*): it establishes the trajectory to become a school leader, ATP or supervisor in basic education, and to become a school leader or supervisor in secondary education (*educación media superior*, EMS). These trajectories include two years of induction. Promotion is undertaken following annual *concursos*. As part of the promotion mechanisms, there is also a system of rewards within the same position (*programa de promoción en la función*, LGSDP, Art. 4, Fraction 8) or voluntary lateral moves (to develop other competencies) aiming to reward those education staff who stood out in both their performance appraisal (*evaluación del desempeño*) and in an additional appraisal for the promotion process (*evaluación adicional*).
3. Re-designs mentoring (*tutoría*) for new teachers during their first two years of service. There are three types of mentoring in order to ensure that it reaches all educational contexts: mentoring *in situ*, online mentoring and rural mentoring. Mentoring aims to:
    - Strengthen the competencies of the teaching and technical teaching staff entering the profession, and support their insertion in the educational workforce and their permanence in the professional teaching service.
    - Contribute to the improvement of teachers' professional practice.
  4. Establishes the SATE as the core support for in-service teachers and educational staff at the school level (see Box 4.1).
  5. Re-designs the framework for the professionalisation of the teaching career (*Marco de la Profesionalización de la Docencia*) within an annual National Continuous Training Strategy (*Sistema Nacional de Formación Continua*). The strategy considers three main lines:
    - Training to elaborate the educational projects required for the evaluation of promotion and permanence of the professional teaching service.
    - Training on the service provided for education staff who participate in the mechanisms of evaluation, tutoring and the SATE.



- Continuous training in the priority themes of the new educational model and transversal themes that are relevant for basic education.

The LGSPD establishes that the SEP is responsible for producing the general guidelines of the SPD. The SEP also collaborates with the state education authorities and with the National Institute for Education Evaluation (*Instituto Nacional para la Evaluación de la Educación*, INEE) to elaborate on and supervise the professional appraisal processes. The new National Co-ordination of the Teacher Professional Service (*Coordinación Nacional del Servicio Profesional Docente*, CNSPD) generates the policies, programmes and actions necessary to guarantee continuous development, training and capacity building to education professionals. The CNSPD has a deconcentrated organisation, with subnational branches at the state level. It is in charge of defining the SPD's profiles, parameters and indicators (*perfiles, parámetros e indicadores*, PPI) and the steps, aspects, methods and instruments of professional appraisal (*etapas, aspectos, métodos y instrumentos*, EAMI). The CNSPD also designs and carries out the appraisals; qualifies and publishes their results; and operates the SATE and the mentorship mechanisms.

State education authorities (*Autoridades Educativas Locales*, AEL) are mainly in charge of providing professional development programmes that are “free, adequate, relevant and congruent” (LGSPD, Article 8), and of participating in the design and implementation of professional appraisal processes. The INEE produces guidelines with quality criteria for the professional development offered by education authorities; it validates the appraisal mechanisms and oversees the processes when appraising teachers.

## Assessment

Teachers are key for improving student learning, and therefore essential to achieving the goals of quality and equity in education expressed in Mexico's constitution. Teachers do not work in a vacuum, however: building a quality teaching workforce requires efforts on numerous levels. This section offers insights from international evidence and practice on three types of policies for ensuring a high-quality teaching profession: school mechanisms that can support and foster a quality teaching profession, effective leadership that can create an environment in which quality teaching can take place and teacher policies aimed at improving the quality of the workforce (OECD, 2014<sup>[9]</sup>).

### *Supporting schools as learning communities*

#### *Ensuring a full occupational structure in each school*

The first requirement that must be complied with if schools are to provide high-quality education is to ensure that they have adequate staff for the different pedagogical and administrative tasks. The SEP is co-ordinating with other education authorities to revise and enhance the occupational structures (*estructuras ocupacionales*) of schools in basic education. The initiative consists in identifying an occupational structure of reference, which defines the basic number of teaching and administrative staff necessary for each type of educational service. This basic structure could then be adapted by education authorities depending on the context in which they provide the various forms of education they are responsible for. As of September 2018, the state education authorities were in the process of presenting their suggestions for the structure of reference to the national authorities. Once all information is collected, the plan is for relevant authorities to formalise the structure of reference and to determine the occupational structures for each

state based on this referential, taking into account each entity's particular needs and resources.

### *Promoting collaborative professional practice among teachers and across schools*

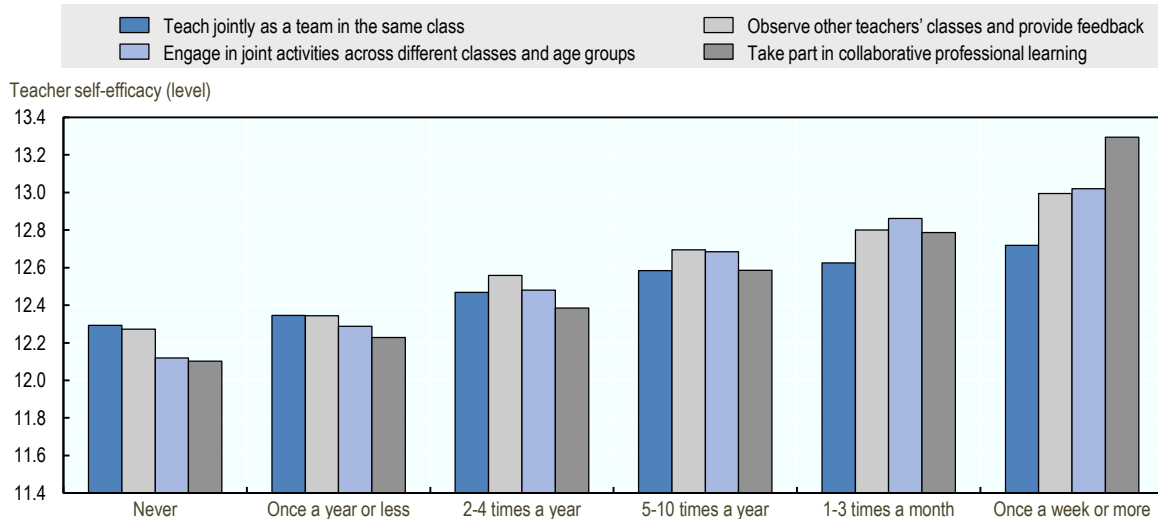
Mexico is in the process of strengthening professional collaboration in its schools. In order to place students at the centre and help improve the teaching profession, schools need to collaborate more systematically; schools' members need to be open to change, open to the community and to the world around them, capable of introducing innovations with agility; and authorities need to support schools to create places where everyone is continuously learning. Perhaps most importantly, teachers need to be open and willing to engage with their colleagues, their administration and their students (Schleicher, 2018<sup>[2]</sup>).

International evidence suggests that although both human capital and social capital in schools are important, social capital can be more influential as a lead school improvement strategy (Hargreaves and Fullan, 2013<sup>[3]</sup>). This points to the importance of focusing on facilitating collaborative working and learning environments to promote teacher professionalisation and school improvement. Fostering collaborative practices in schools, whether through collaborative professional development, systems of peer feedback or collaborative teaching, are highly beneficial to teacher self-efficacy and job satisfaction. Analyses show that teachers who report engaging more in collaborative activities also tend to show higher levels of job satisfaction as well as self-efficacy (Figure 4.1). Professional teaching collaboration include teaching jointly in the same class, observing and providing feedback on other teachers' classes, engaging in joint activities across different classes and age groups and taking part in collaborative professional learning. Further, TALIS analysis shows that collaborative learning is highly associated with effective practice in the classroom (Opfer, 2016<sup>[10]</sup>; Barrera-Pedemonte, 2016<sup>[11]</sup>). Formal collaborative learning flourishes in schools with suitable school mechanisms and supportive leadership. It generally entails teachers meeting regularly to share responsibility for their students' success at school (Chong and Kong, 2012<sup>[12]</sup>).

Mexico has undertaken its own strategy to build the model of schools as learning communities at the centre of the education system, known as *La Escuela al Centro*. The strategy can form the basis on which to build more robust and frequent teacher collaboration and to establish a learning culture that includes professional learning communities, peer feedback and professional learning plans. *La Escuela al Centro* strategy and the structure of the SPD signal a shift for Mexico towards more systematic and formal professional collaboration. The School Technical Councils (*Consejo Técnico Escolar*, CTE) provide a valuable space for exchanges on professional practice among the pedagogical team (i.e. the school leader, the teachers and, potentially, support agents such as the ATPs).

**Figure 4.1. Teachers' self-efficacy and professional collaboration, 2013**

Teachers' self-efficacy level according to the frequency of teacher professional collaboration for the following items for lower secondary education



*Note:* To assess teachers' self-efficacy, TALIS 2013 asked teachers to indicate to what extent they can do certain activities (on a four-point scale ranging from "not at all" to "a lot"), by responding to a number of statements about three indices: their efficacy in classroom management, in instruction and in student engagement. The index of teacher self-efficacy is summarised across these three indices. A higher index value indicates a higher level of self-efficacy.

*Source:* OECD (2014<sup>[9]</sup>), *TALIS 2013 Results: An International Perspective on Teaching and Learning*, <http://dx.doi.org/10.1787/9789264196261-en>.

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Within the new framework, schools are strongly encouraged to hold at least one session per month with their CTE. Furthermore, a new strategy entitled Learning between Schools (*aprendizaje entre escuelas*) was suggested for the CTEs: since 2016, teachers across 3 or 4 schools have met twice during the school year to exchange on their practices, experiences, materials and pedagogical strategies. In 2017, teachers shared a class (live or recorded) to be commented by their peers. The SEP reports that close to 90% of schools took part in this strategy (information communicated by the SEP directly to the OECD team). The establishment of mentorship programmes also aims to stir collaboration between experienced teachers and teachers initiating their careers. The SATE, to be carried out by supervisors and technical pedagogical advisors (*Aseores Técnico-pedagógicos*, ATP) aims to stimulate exchanges about pedagogical practice between schools' teaching staff and the supervision level.

Historically, Mexico's school educators have engaged in more informal collaboration (OECD, 2010<sup>[13]</sup>). According to the exchanges of the OECD team visiting Mexico, one of the unexpected effects of the teachers' appraisal was the emerging of informal collaboration practices among teachers, mainly with the purpose of helping each other to prepare for their evaluations. The team also observed that teachers exchanged practices on individual blogs following the publication of the new curriculum.

Other efforts to systematise professional collaboration exist in Mexico but remain sparse. Some states such as Puebla promoted supervisor councils and teacher councils which can

be found working closely with the SEP, giving advice on how to better implement educational initiatives. The cases of learning communities (*comunidades de aprendizaje*) encouraged by the National Council for Educational Development (*Consejo Nacional de Fomento Educativo*, CONAFE), could be further studied and fostered beyond rural schools as a model of collaboration.

However, peer collaboration, time scheduled for collaboration in schools and learning communities are not yet extensively present, partly for lack of time and resources and partly due to the individualistic view of the teaching profession that still prevails. It is not only a matter of establishing collaborative spaces by norm. A culture of collaboration and a vision of the teaching profession as intrinsically tied to the school and learning communities has to be effectively supported and developed.

Collaborative learning tends to be active and interactive and often involves participation in a professional learning community (PLC) or other practices. This enables to engage teachers socially, giving them opportunities to share ideas and seek solutions to problems together, to learn with and from one another (Guskey, 1995<sup>[14]</sup>; Lieberman and Pointer Mace, 2008<sup>[15]</sup>). Many countries have incorporated PLCs or networks as part of their professional learning programmes, which can be implemented at a school, district, regional, national or even at an international level. PLCs tend to be most successful when they are guided by a shared vision and implemented in a context of trust, accountability and willingness/ability to take risks (Hunzicker, 2011<sup>[16]</sup>). This last point is a key factor in the success of peer feedback, as an important part of collaborative professional development relies on teachers sharing their practice openly with colleagues and on their willingness to provide and receive critical and constructive feedback (Hatch et al., 2005<sup>[17]</sup>).

A number of Asian countries incorporate this as everyday practice in their school, with more experienced teachers sharing their knowledge and skills with less experienced peers (see Box 4.2). For instance, in Japan, there has been a long tradition of collaborative peer learning through “lesson study” throughout teachers’ careers. Because they do not want to let the group down, teachers work hard to develop high-quality lesson plans, to teach them well and to provide sound and useful critiques when it is their colleagues’ turn to demonstrate their lesson plans to them.

Successful education systems like Finland, Japan, Korea and Singapore devote considerable time to school level activities related to instructional improvement, including for collaborative learning. There should be a time in a teacher’s day designated for collaboration with peers, discussing instructional practice, group preparation and professional development (Darling-Hammond and Rothman, 2011<sup>[18]</sup>; Darling-Hammond, 2010<sup>[19]</sup>). In Japan, 40% of teachers’ working time is devoted to these kinds of activities. Developing professional development at the school level is particularly important in Mexico because many schools in rural areas are quite isolated and national capacity to help meet their teachers’ needs is quite limited.

### ***Effective leadership and management***

Another important aspect of the reform in Mexico has been the development and consolidation of leadership capacity at the school level. Many countries have seen a shift from bureaucratic school systems to school systems in which schools themselves have more control over resource uses, instruction, curriculum and work planning. This encourages school leaders and teachers to work together to identify good practices, adapt

or create them according to their students' needs and build a learning community to support each other in improving the quality of their work.

#### Box 4.2. Collaboration and peer learning in Asian systems

##### Lesson study in Japan

Throughout their career, Japanese teachers are required to perfect their teaching methods through interaction with other teachers. Experienced teachers assume responsibility for advising and guiding their young colleagues. Headteachers (school leaders) organise meetings to discuss teaching techniques. Meetings at each school are supplemented by informal district-wide study groups. Teachers work together to design lesson plans. After they finish a plan, one teacher from the group teaches the lesson to her students while the other teachers look on. Afterwards, the group meets again to evaluate the teachers' performance and to make suggestions for improvement. Teachers from other schools are invited to visit the school and observe the lessons being taught. The visitors rate the lessons and the teacher with the best one is declared the winner.

##### Demonstrating lessons and masterclasses in Shanghai (China) and Singapore

The concept of “masterclasses” or “demonstration lessons” has become more widely used in Asian contexts, including in Shanghai and Singapore. In this model, an accomplished or very experienced teacher gives lessons for multiple teachers (either within the same school or across multiple schools within the system) to observe. In Shanghai, master teachers are drawn from the top 1% of teachers in their subject field. They typically provide masterclasses at the district level three times per term.

A variation of this model, the “cascading model of teacher mentoring”, is also used in these systems to develop teacher capacity in a subject field across the system. Master teachers essentially mentor the next level of senior teachers using the process above, who in turn mentor other teachers in their own school.

Finally, in Singapore, the Outstanding Educator in Residence (OEIR) programme, organised by the Academy of Singapore Teachers, takes the masterclasses one step further (and more global) by inviting outstanding overseas teachers to conduct masterclasses.

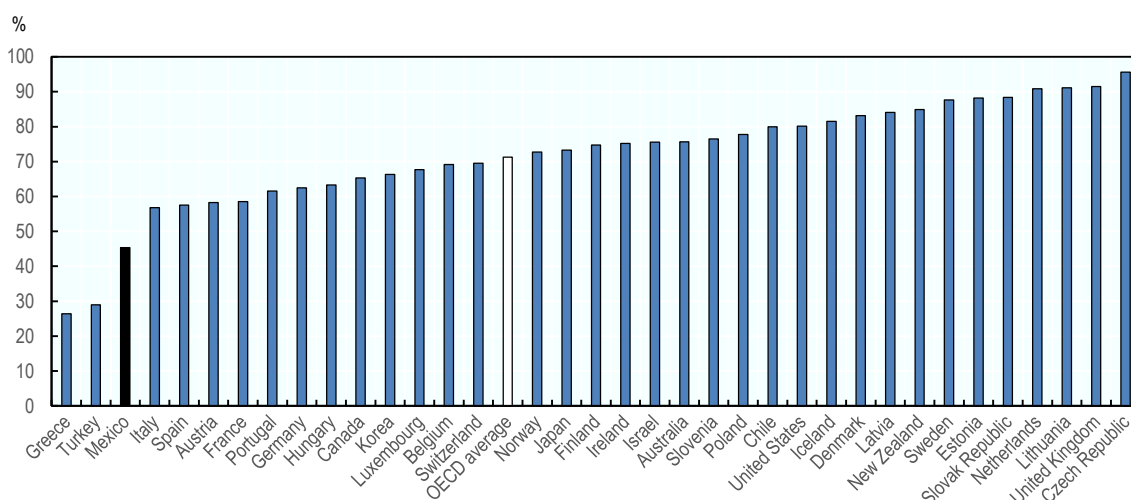
Sources: Jensen, B. et al. (2016<sub>[20]</sub>), *Beyond PD: Teacher Professional Learning in High-Performing Systems*, <http://www.ncee.org/cieb> (accessed on 17 September 2018); Stevenson and Stigler, 1992, as cited in OECD (2010<sub>[13]</sub>), *Improving Schools: Strategies for Action in Mexico*, <http://dx.doi.org/10.1787/9789264087040-en>.

#### *Developing capacity at the school level*

Historically, schools have had very little autonomy in Mexico: in 2015, Mexico scored the third lowest index of school autonomy among OECD countries, which means that school personnel had responsibilities for less than half the tasks related to resource allocation and decisions about curriculum and instructional assessment (OECD, 2016<sub>[21]</sub>). Figure 4.2 shows the index of school autonomy across OECD countries in 2015. As noted in an OECD review carried out in 2010, the organisation and structure of education in Mexico makes it difficult for the system to promote large-scale school autonomy (OECD, 2010<sub>[13]</sub>). **These challenges must be acknowledged and this report does not suggest schools in Mexico should be left to operate by themselves. By school autonomy we**

refer to the capacity for schools to assume a considerable share of responsibility in specific areas of decision making, by comparison with a situation where authorities at higher levels make all decisions. This engagement of school staff and local stakeholders in decision making in areas that are related to local and school needs is increasingly necessary to the success of education in 21st century education systems (Viennet and Pont, 2017<sup>[22]</sup>). There is evidence that some autonomy in curricular matters has a positive impact on students' performance according to PISA results (see the chapter on the curriculum in this report). However, benefits are usually conditional on having effective accountability systems in place and high levels of capacity of school leaders and teachers (Hanushek, Link and Woessmann, 2013<sup>[23]</sup>). It is therefore crucial that education authorities help school communities build their capacity to make decisions to enhance student learning and improve education, including school leaders.

Figure 4.2. Index of school autonomy across OECD countries, PISA 2015



*Note:* The index of school autonomy is the percentage of tasks for which the principal, teachers or school governing board have considerable responsibility, including allocating resources to schools and responsibility for the curriculum and instructional assessment within the school. Results are based on school principals' reports.

*Source:* OECD (2016<sup>[21]</sup>), *PISA 2015 Results (Volume II): Policies and Practices for Successful Schools*, <http://dx.doi.org/10.1787/9789264267510-en>.

StatLink  <http://dx.doi.org/10.1787/888933922004>

The School at the Centre strategy aims both to reinforce schools' capacity for autonomy and to reduce the administrative load on system leaders (school leaders and supervisors) to allow them to exert more pedagogical leadership. This effort toward greater autonomy at the school level in some areas is in line with policies adopted or practices in some countries. Examples include Ireland, Norway, the Netherlands, Chile or the United States to different degrees (OECD, 2016<sup>[21]</sup>).

The School at the Centre implies an effort by education authorities to provide resources and develop capacities and to help grow a culture of autonomy, which can help schools and their leaders to fulfil their tasks. Two main programmes allocate additional resources to strengthen schools: the Education Reform Programme (*Programa de la Reforma Educativa*, PRE) and the Full-Time Schooling programme (*Escuelas de Tiempo Completo*). After financing infrastructure investment, the PRE shifted in 2017 to focus

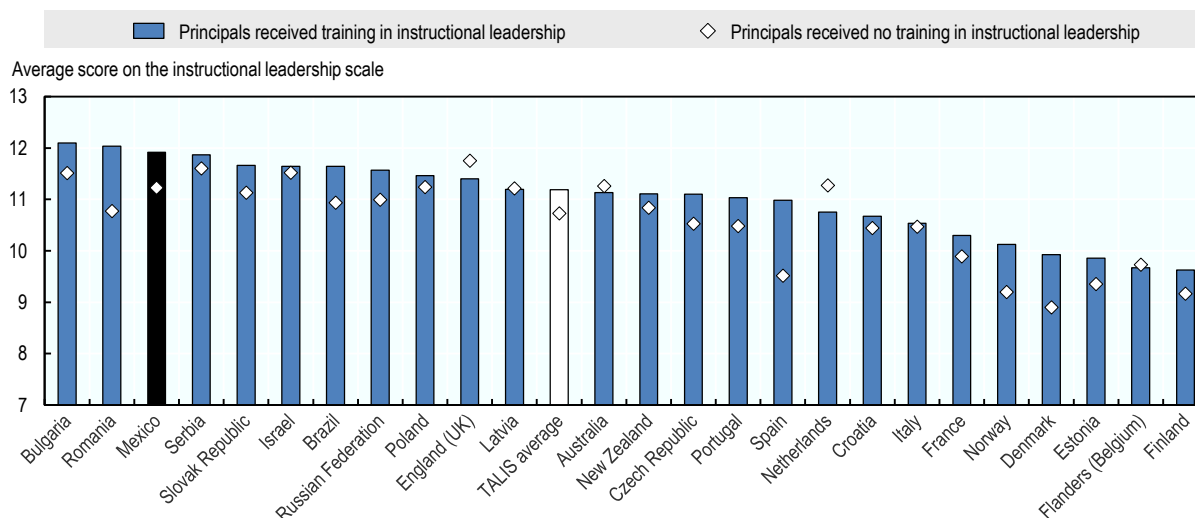
resources on increasing schools' resource autonomy (see Chapter 2 for more details). These two programmes aim to provide 75 000 schools with a specific budget calculated according to the schools' attendance. This first step is encouraging and will require close monitoring and follow-up with schools in order to make sure school communities manage and spend these extra resources in ways that enhance the quality of school processes: in the end, the ultimate goal of these investments is to improve student learning.

In addition, granting direct funds to schools requires key stakeholders to develop their skills and responsibilities in financial management of school investments. These stakeholders include: school leaders, teachers and CTEs; the supervision team (*supervision escolar*); participants in the Social Participation Councils (*Consejos Escolares de Participación Social en la Educación*, CEPSE) such as parent representatives and community spokespersons; and state education authorities (OECD, 2017<sup>[24]</sup>). To this effect, the School at the Centre initiative is closely linked with the strategies for continuous professional development of education staff (see the section on system leaders and support actors) and with programmes such as the SATE to strengthen advice and support at the school level.

### *School and system leaders*

School leaders, supervisors and ATPs are essential for improving the quality of teaching and learning environments in schools. School leaders are the glue, enhancers and champions of each learning community: they play a key role in improving school outcomes by influencing the motivations and capacities of teachers, as well as the environment and climate within which they work. Effective school leadership is essential to improve the efficiency, quality and equity in schooling (Pont, Nusche and Moorman, 2008<sup>[25]</sup>).

The Professional Teacher Service (2013) (*Servicio Profesional Docente*) aims to professionalise school leaders by introducing a selection and recruitment process, as well as an induction process during the first two years of practice (INEE, 2015<sup>[26]</sup>). Public selection processes (*concursos*) are now organised, with candidates expected to have a minimum of two years' experience before being definitively appointed. These processes are based on specific profiles determined jointly by the INEE and national and state authorities. School leaders will be confirmed in their post only after positive appraisal. Upper secondary principals have the option to renew their appointment or to return to the status of teacher if they are not reconfirmed in their post. Before the SPD, over half of school leaders were in fact teachers acting as school principals, without any formalised role (OECD, 2018<sup>[8]</sup>). The School at the Centre strategy has brought together several efforts to develop principals' skills and to give them tools to provide pedagogical advice to their teachers. Since 2014-15, the SEP started a controlled experiment with the World Bank. In the treatment schools, principals receive special training in leadership, class observation and student learning monitoring tools, as well as certification on school management; the intervention also considers family training in parenting skills. Principal management skills and student achievement are the outcome variables. Final results of the impact evaluation will be presented in the end of 2018. As TALIS data have shown (see Figure 4.2), school leaders who have received training in pedagogical leadership (practices school leaders use in relation to the improvement of teaching and learning) are more likely to engage in these practices in their school (OECD, 2016<sup>[27]</sup>). In turn, pedagogical leadership is a strong predictor of how teachers collaborate and engage in a reflective dialogue about their practice.

**Figure 4.3. Principals' training in instructional leadership, lower secondary education, 2013**

Source: OECD (2016<sup>[27]</sup>), *School Leadership for Learning: Insights from TALIS 2013*, <http://dx.doi.org/10.1787/9789264258341-en>.

StatLink  <http://dx.doi.org/10.1787/888933369605>

The School at the Centre strategy also aims to lighten the administrative load that falls onto school leaders, so they can devote more time to exercise pedagogical leadership in their schools and offer guidance to their teachers. In a previous review, the OECD noted that school leaders still tended to see themselves as administrators rather than pedagogical leaders (OECD, 2010<sup>[13]</sup>).

The new policies aim to clarify the responsibilities of key school figures (especially the teacher, school leader, supervisor and technical pedagogical advisor) and to strengthen the role of school supervision as a primary source of advice and support to school leaders. In this regard, the SATE (see Box 4.1) is a vital support for school leaders and their schools, since the service is expected to bring both administrative and pedagogical advice. A school improvement service like the SATE holds great potential, given its central role in the support to teachers and system leaders (i.e. principals and supervisors).

School leaders, through the work they do and the relationships they establish with teachers, staff and students, help to create a positive, supportive climate for learning. In Chile, for example, the main task of school principals has evolved from administrator to the implementation and management of the school educational project. This implies that all school principals should: develop, monitor and evaluate the goals and objectives of the school, the study plans and curricula and strategies for their implementation; organise and guide the technical pedagogical work and professional development of teachers; and ensure that parents and guardians receive regular information on the operation of the school and the progress of their children. (Box 4.3).

In Ontario, Canada, a leadership organisation has been supporting school leaders in part by providing a research-based leadership framework for pedagogical leadership (see Box 4.4) and this is an example Mexico can look at to reflect on and enrich its own school leadership policies.



**Box 4.3. Strengthening the role of the principal by developing school leadership standards in Chile**

In a shift from the traditionally administrative and managerial role of school leaders, Chile developed standards to emphasise school leaders' pedagogical role. Different sets of school leadership standards provide guidance for school leaders about the role they should fulfil. The original Good School Leadership Framework (*Marco para la Buena Dirección*), published by the Ministry of Education in 2005, was updated with a new set of standards in 2015 (*Marco para la Buena Dirección y el Liderazgo Escolar*).

These school leadership standards have been designed to support school leaders in their self-reflection, self-evaluation and professional development; to establish a common language around school leadership that facilitates reflection of school leadership within the school community; to guide the initial preparation and professional development of school leaders; to provide a reference for the recruitment and evaluation of school leaders; to facilitate the identification of effective school leaders and to spread good practices; and to promote shared expectations about school leadership and provide a reference for professional learning.

Overall, school leadership standards are not prescriptive and represent a common reference that is adapted to local contexts. To reflect the contextual nature of school leadership, the standards distinguish conceptually between “practices” and “competencies” that form the basis of successful school leadership. On one hand, practices entail five dimensions: i) constructing and implementing a shared strategic vision; ii) developing professional competencies; iii) leading processes of teaching and learning; iv) managing the school climate and the participation of the school community; and v) developing and managing the school. On the other hand, personal resources comprise three areas: i) ethical values; ii) behavioural and technical competencies; and iii) professional knowledge.

Source: Santiago, P. et al. (2017<sup>[28]</sup>), *OECD Reviews of School Resources: Chile 2017*, <http://dx.doi.org/10.1787/9789264285637-en>.

Another key leadership figure at school and subnational levels is the school supervisor. Each state organises its system of supervision of schools, structured according to geographical areas at two levels: sectors (*sectores*) and zones (*zonas*). Sectors consist of a number of zones and each zone comprises a number of schools. Supervisors take responsibility for each zone (and the respective schools). Supervisors function as the direct link between schools and education authorities (Santiago et al., 2012<sup>[4]</sup>). There are 14 197 school supervisors (*supervisores escolares*, which can also be translated as “school inspectors”) in Mexico, who are responsible for attending and supervising between 6 and 50 schools each (as of 2018, data provided by the SEP).

Supervisors are in charge of guaranteeing that their schools provide quality education to all the students. Supervisors' main function is to provide advice and support according to the needs expressed by the school leaders and teachers in their school zone. They function as the institutional link between the various levels of educational governance. The figure of the supervisor is expected both to provide advice and support, and to promote participative management in schools. Supervisors are also expected to support bottom-up initiatives from teacher and school leader groups, especially when these initiatives are

aimed at making sure that all students can reach at least the expected learning outcomes. A previous OECD study found that supervisors tended to focus on their role as administrative inspectors while providing rudimentary pedagogical advice (Santiago et al., 2012<sup>[4]</sup>).

Because of supervisors' strategic position, they are in a unique place to help schools improve their practice. Efforts have been made to strengthen their role, especially in pedagogical matters. In 2014, the SEP committed to:

- Significantly reduce the administrative load on school supervisors and strengthen their functions of pedagogical advice and orientation.
- Establish support teams for school supervision to continuously develop and improve schools.

Since then, the SEP has implemented a series of actions to strengthen supervisors' professional skill set and to facilitate their access to schools and classrooms so they can contribute more directly to improving learning. One flagship initiative is the creation of a certification programme specifically designed for supervisors. Examples of training courses for supervisors include class observation methods and basic elements of student assessment, which is expected to strengthen supervisors' expertise in pedagogical practices and issues in the classroom. As of September 2018, 12 414 supervisors had been accredited, a completion rate of 78% (data provided by the SEP). When interviewed, SEP officials acknowledged that there was still room for progress to strengthen school supervision.

#### Box 4.4. Developing education leadership in Ontario, Canada

The Institute for Educational Leadership (IEL) in Ontario is a virtual organisation made up of a partnership of representatives from Ontario's principals' and district officers' associations, councils of school district directors and the Ministry of Education. Its purpose is "to further develop educational leadership so as to improve the level of student achievement in Ontario's publicly funded education system. One of IEL's five practices and competencies within its research-based leadership framework for school principals and deputy principals is "leading the instructional program", described as: "The principal sets high expectations for learning outcomes and monitors and evaluates the effectiveness of instruction. The principal manages the school organisation effectively so that everyone can focus on teaching and learning". Among a number of practices outlined to achieve this are: ensuring a consistent and continuous school-wide focus on student achievement; using data to monitor progress; and developing professional learning communities in collaborative cultures. Associated skills include that the school principal is able to access, analyse and interpret data, and initiate and support an enquiry-based approach to improvement in teaching and learning. Related knowledge includes knowledge of tools for data collection and analysis, school self-evaluation, strategies for developing effective teachers and project management for planning and implementing change.

*Source:* Ontario Institute for Educational Leadership (2018<sup>[29]</sup>), *Ontario Leadership Framework*, <http://www.education-leadership-ontario.ca/en/resources/ontario-leadership-framework-olf> (accessed on 10 July 2018).

Efforts were made as well to reform and formalise the role of the support figures for school supervisors. Historically, school supervision units (*supervisiones escolares*) had a

small number of staff aimed to provide administrative and pedagogical expertise (technical administrative advisors – *asesores técnico-administrativo*, ATA; and technical pedagogical advisors – *asesores técnico-pedagógico*, ATP).

The technical pedagogical advisor (*asesor técnico pedagógico*, ATP) became a central figure to guarantee that the reforms contribute to school and teacher improvement in Mexico. “ATP” was used to refer to any individual with teacher status who was not in front of a class, did not have a legal status and was given no specific professional guidelines (OECD, 2010<sub>[13]</sub>). Within the new SPD framework, the ATP role has been defined as an education professional whose main function is to provide expert pedagogical advice to teachers, school leaders and supervisors. It is thus a figure of support, central to the School at the Centre programme and, more generally, to the initiatives to improve the quality of teaching and learning. ATPs will also be subject to selection and recruitment processes and can participate in the different promotion mechanisms (OECD, 2018<sub>[8]</sub>).

ATPs play a key role in the SATE and are partners of school supervisors. ATPs participate in planning, developing and following up on SATE activities in their zone; designing the service’s support strategy, giving priority to the schools most in need; visiting schools periodically to bring advice and support to teachers and school leaders; observing the work done with students in the classes; and creating networks and learning communities between education professionals and between schools in their zone (SEP, 2017<sub>[30]</sub>). The SATE also counts on administrative support, provided by an experienced school leader to his/her peers in the supervision’s zone.

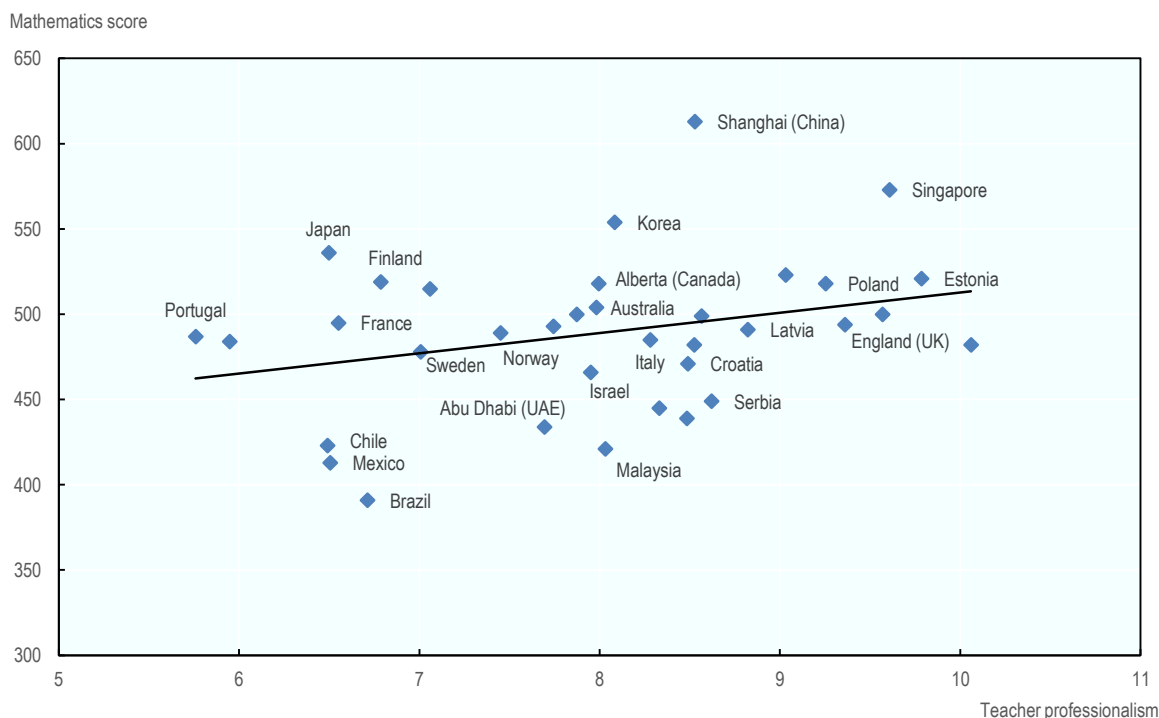
Implementing a service like the SATE can take time, especially because education authorities needed to fill 33 000 ATP positions for the SATE to be operational in every supervision area. At the time this report was written, however, only a third of these were allocated (data communicated by the SEP to the OECD team).

Other countries have set up similar advice services to support schools and their leaders with qualified professionals in both pedagogical and administrative matters. For instance, challenge advisors have been introduced in regional improvement consortia in Wales to provide practical guidance and support to schools (OECD, 2018<sub>[31]</sub>).

### ***Developing the teaching profession***

#### *Efforts to strengthen teacher professionalism*

Teachers should have a deep understanding of what they teach and of their students. This requires specific curricular knowledge as well as knowledge about pedagogy and practice that enables teachers to create effective learning environments and foster adequate learning outcomes. By seeking to professionalise the educational workforce with a career perspective in Mexico, the SPD aligns with evidence that highlights how career progression opportunities can enhance teacher quality. This includes the preparation, selection, recruitment, evaluation, professional training, support and incentives for teachers to develop as professionals (OECD, 2005<sub>[32]</sub>). The SPD formalises the progression paths for the various professions available to the education workforce, signalling educational careers as coherent professional careers. TALIS analyses have shown a positive relationship between teacher professionalism and student achievement as measured by PISA results (see Figure 4.4 below), suggesting the importance of investing in policies to promote teacher professionalism (OECD, 2016<sub>[33]</sub>).

**Figure 4.4. PISA scores in mathematics and overall teacher professionalism (ISCED 2), 2013**

*Note:* The index of overall teacher professionalism relies on three domains: knowledge, autonomy and peer networks. Each of the domains is scaled from 0 to 5.0, with 5.0 representing a theoretical maximum where all practices within the domain are observed for a given teacher. The overall index is the sum of the scales between the three domains.

*Source:* OECD (2016<sup>[33]</sup>), *Supporting Teacher Professionalism: Insights from TALIS 2013*, <http://dx.doi.org/10.1787/9789264248601-en>.

StatLink  <http://dx.doi.org/10.1787/888933922023>

Teachers today are increasingly expected to perform tasks that fall beyond their traditional job description (Schleicher, 2018<sup>[2]</sup>). They are counted on to provide students with both cognitive and non-cognitive skills, such as self-confidence and collaborative skills. In addition, teachers are expected to be aware and respond to students' individual needs; and to work with other teachers and parents to ensure the proper development of their students (Schleicher, 2018<sup>[2]</sup>). A key aspect of high-performing school systems worldwide is a clear focus on continuously supporting the professional learning of its teachers (Schleicher, 2016<sup>[1]</sup>). Improving teaching and learning remains the surest way of improving the educational system as a whole – and ensuring quality initial teacher education and continued professional learning is a key policy lever in this regard (Mourshed, Chijioke and Barber, 2010<sup>[34]</sup>). Improving the quality of the teaching profession is thus – with reason – at the centre of many education policy reforms (OECD, 2013<sup>[35]</sup>).

It should be noted that initial teacher education is not covered in this report, as the analysis focuses on entry mechanisms of the SPD and continuous professional development. Another OECD report to be published in 2019 covers higher education in Mexico and provides elements on initial teacher education (OECD, 2019<sup>[36]</sup>).

The entry mechanism instituted with the SPD aims to enhance the quality of the teachers and future educators entering the profession. Recent evidence highlights that the selection process (the *concurso de oposición para el ingreso*, entrance examination) has contributed to improving the quality of new teachers, as they appear to have higher levels of knowledge than the cohorts entered before the *concurso* was established. According to some experts, the entrance examination effectively identifies the candidates who display the best levels of knowledge in mathematics and reading comprehension (de Hoyos and Estrada, 2018<sup>[37]</sup>; SEP, 2018<sup>[38]</sup>).

By allowing candidates from other professions to take the entrance examination (*concurso de oposición para el ingreso*), Mexico has opened the door to attracting quality candidates from broader backgrounds. Offering flexible teacher education opportunities and opening new routes to enter the teaching profession to other professionals with relevant experience can help in ensuring a quality pool of candidates for the teaching workforce (Schleicher, 2018<sup>[2]</sup>). An issue is, therefore, to guarantee that these training opportunities exist and effectively allow new teachers to develop the skills necessary to guide student learning. As of 2018, Mexico is still in the process of reinforcing these mechanisms. The interviews led by the OECD suggested that these training mechanisms still needed further improvement. Mexico has started to invest in the professionalisation of its education workforce and needs to continue building on its efforts.

The obligation for new teachers to follow a mentoring programme (*tutoría*) during their induction period represents noticeable progress in the SPD. In 2013, 86.2% of primary education teachers and 72% of teachers in lower secondary education worked in schools that had no induction programmes for new teachers, while only 17.5% of teachers reported having a mentor against 24.8% on average across TALIS countries (OECD, 2014<sup>[9]</sup>). Mentoring promotes teachers' professional growth by both expanding their knowledge base and supporting them emotionally (OECD, 2016<sup>[33]</sup>). It is well documented that teachers who participate in strong mentoring are more likely to impact their students' achievement positively and to remain longer in post (Borman and Dowling, 2008<sup>[39]</sup>; OECD, 2016<sup>[33]</sup>).

The LGSPD does not only make mentoring compulsory during induction, it also grants teachers the right to receive this support. Since 2013, three mentoring modalities were developed: flexible and in person with one mentor for one or a group of mentees; in a group, once per month in rural areas; and on line. In-person mentoring is the only modality that allows for in-class observation, an activity highly valued by new teachers (INEE, 2017<sup>[40]</sup>; Mexicanos Primero, 2018<sup>[41]</sup>). The other two modalities consist more of an induction course with a personal project for teachers to carry out in their school, but have the advantage of adapting to the difficulties small, remote schools have in accessing mentors (Mexicanos Primero, 2018<sup>[41]</sup>).

The initial years of the SPD saw a mismatch between the need for mentors and the number of teachers, supervisors, school leaders or support staff available and willing to act as mentors, but progress had been made: the SEP reported that 78% of the teachers received mentoring in 2015/16 (SEP, 2018<sup>[42]</sup>) but with uneven coverage across states (Mexicanos Primero, 2018<sup>[41]</sup>). One of the reasons for the slow start was the low response rate among experienced professionals, for whom the incentives were unclear or intangible – some mentors report not having received their monetary incentive for two years (INEE, 2017<sup>[40]</sup>; Mexicanos Primero, 2018<sup>[41]</sup>). In 2017/18, access to mentoring reached 88.9% of teachers (SEP, 2018<sup>[42]</sup>), by developing the 3 modalities and guaranteeing payment of incentives to mentors. Analysts report that challenges remain, however, both in respecting

teachers' right to mentoring and in guaranteeing that this mentoring effectively helps them improve (INEE, 2017<sup>[40]</sup>; Mexicanos Primero, 2018<sup>[41]</sup>).

Continuous professional development (CPD) is slowly evolving under the impulse of the SPD. Providing CPD is the responsibility of the 32 states, across which training and development offers vary greatly. Mexico introduced the National Strategy for Continuous Training of Teachers (2016) in basic and upper secondary education. The programme is intended to improve the skills of teachers, in particular, those showing below average results in teacher appraisals. Under this strategy, staff will choose programmes – focused on content and/or pedagogical methodology – according to their needs and the results of their appraisal. Based on the tender (*convocatoria*) put out for continuous professional development, 26 training organisations (*instancias formadoras*) were accepted as official CPD providers by the SEP. Data provided by the SEP refers to a total of 1 196 different CPD and training programmes for teachers in basic education, in the form of courses, workshops and certification programmes (data communicated by the SEP to the OECD team).

The central authority also provides professional development programmes. As of 2018, 120 online courses and 46 online certification programmes (*diplomados*) were made available by the SEP for education professionals in basic education, and 64 different programmes were offered specifically to upper secondary education teachers (data communicated by the SEP to the OECD team). This is a major challenge in Mexico: in-person training and other face-to-face professional development with tutors demand a great amount of resources given the number of education professionals and the scale of the country. The SEP started using technologies and online platforms to cope with this challenge. This resulted in 626 000 teachers, school leaders and supervisors signing up in 2017 (data communicated by the SEP to the OECD team, one teacher potentially being able to complete more than one course). These training modules included the three courses offered to the teachers, school leaders and supervisors who had gone through performance appraisal (*línea 1*); the courses proposed as part of the SPD processes of entry, promotion and permanency (*línea 2*); and all other courses available (*línea 3*). The SEP estimated that an additional 1.2 million teachers will be completing courses specifically about the new education model in 2018 (by 4 June, it reported progress on 74% of this figure). In upper secondary education, 110 000 teachers signed up for at least 1 course in 2016 and 2017; this number was 72 000 by mid-year in 2018 (data communicated by the SEP to the OECD team). The National Union of Education Workers (*Sindicato Nacional de Trabajadores de la Educación*, SNTE) also has developed a range of professional development courses for teachers through its foundation Fundación SINADep (*Sistema Nacional de Desarrollo Profesional*, National System for Professional Development).

Overall, many of the components for the development of a comprehensive teacher career appear to be in place in terms of teacher selection and recruitment, mentoring, availability of professional development and appraisal, reviewed in the next section. However, many of these processes appear to be excessively focused on the appraisal processes themselves, which dilutes the career perspective of the SPD.

### *Appraisal for quality teaching: A career perspective*

The new SPD framework considers appraisal and professional development as complementary tools to enhance the quality of the teaching profession. Authentic professional appraisal, which refers to the accurate assessment of the effectiveness, the

strengths and areas for development of educational professional practices (including teaching, school management, advice and supervision) is central to the continuous improvement of schooling (Santiago et al., 2012<sup>[41]</sup>). Research highlights the importance of developing systematic approaches to teacher appraisal that support continuous learning for individual teachers throughout their career and for the profession as a whole (OECD, 2013<sup>[35]</sup>). The SPD framework comprises four types of appraisal:

- the entrance appraisal (*concurso de oposición para el ingreso*), a teacher registration process for candidates to teaching positions in basic and upper secondary education
- the diagnostic appraisal (*evaluación diagnóstica*), a process of completion of probation for newly appointed teachers
- the promotion appraisal (*concurso de oposición para la promoción*), an appraisal mechanism for promotion of candidates to management, supervision and counselling positions
- the teacher performance appraisal (*evaluación del desempeño*), a regular performance appraisal for in-service teachers.

Some components build upon existing policies. For instance, the selection process to enter the teaching profession was initially made through the National Teaching Post Contest (2008-13), which aimed to improve the transparency and quality of the selection process (OECD, 2018<sup>[8]</sup>). The new registration process for teachers is open to all graduates with a bachelor's degree (*licenciados*) from public or private higher education. According to SEP data, between 2014 and July 2018, more than 806 000 candidates took part in the entrance appraisal (*concurso de oposición para el ingreso*) in basic or upper secondary education, of which close to 400 000 received sufficient results to be considered for teaching positions. Over the same period, more than 171 000 new positions were allocated through the entrance appraisal. Studies report that with time, the quality of new entrants appears to have improved, as suggested by a comparison of the academic results of new teachers before and after 2014 (de Hoyos and Estrada, 2018<sup>[37]</sup>; SEP, 2018<sup>[38]</sup>).

The promotion appraisal (*concurso de oposición para la promoción*) has also had a number of candidates from 2014 to 2018. The SEP reports that during the period, more than 158 000 candidates took the assessment in basic education, of which 54.1% were estimated to be apt for new leadership positions, including school leaders or supervisors. For basic and upper secondary education, more than 175 000 teachers took the test and 53.3% passed.

However, a larger part of the debate around Mexico's education reform package has revolved around the performance appraisal component (*evaluación del desempeño*) and around the discussion of whether teachers should be appraised while in-service, how and with what consequences. According to SEP data, from 2014 until 2018, more than 1.6 million educators have gone through the evaluation process. This appraisal mechanism requires some precisions.

The items used to appraise teacher performance are elaborated by CENEVAL (*Centro Nacional de Evaluación para la Educación Superior*, the National Centre for Higher Education Evaluation) with the participation of teachers themselves: 50 000 teachers participated since the beginning of the teacher performance appraisal (information communicated by the SEP to the OECD team). The LGSPD assigns to the INEE the

responsibility for approving the elements, methods and tools to carry out the appraisal. The law determines that teachers must undergo performance appraisal at least once every four years.

The results from the professional performance appraisal are communicated by the CNSPD to the participants through an individual result report form (*informe individual de resultados*). As the integrated information and management system is being developed (*Sistema de Información y Gestión Educativa, SIGED*), these results are also being compiled in the system's database and made available for consultation to each education professional, through their personal identification (Chapter 5 provides a detailed description of the SIGED). Reports collected during the interviews with the OECD team show that, in some schools, teachers at least discuss their results with their school leaders and some use them to investigate the available offer for continuous professional training and to choose modules.

The interviews performed by the OECD team revealed two main findings. First, the teachers who had already been appraised or who knew fellow teachers who had been appraised saw the professional performance appraisal as constructive in principle. Second, numerous teachers and education professionals however, manifestly feared losing their position because of the appraisal, in spite of the low likelihood to fail repeatedly on the appraisal. SEP data show that after 5 years of teacher performance appraisal, only 0.6% of the more than 200 000 teachers appraised failed 3 consecutive times (data communicated by the SEP to the OECD team).

The reforms' focus on student learning and school improvement implies that appraisal has consequences for educational staff. It is important to recall that, by law, the performance appraisal mechanisms include the obligation for teachers receiving unsatisfactory results to follow professional development courses in order to improve their knowledge and practice. **In the case of teachers who were already in post when the law came into effect, the only risk if they receive unsatisfactory results on three consecutive performance appraisals is for them to lose their position in front of a class. This removal does not mean that the teachers lose their job in public education, but that they must fulfil other tasks than teaching in front of a class, as determined by the relevant local authority or decentralised organisation (LGSPD Article 53 and Transitory Article 8).** On the other hand, three consecutive unsatisfactory results will lead to destitution for the teachers entering the profession after the law came into effect. Most importantly, people in this situation can opt for re-entry into the teaching profession through the regular entry exam now in place.

Other elements were pointed out that fuelled discontent with the performance appraisal processes. The United Nations Educational, Scientific and Cultural Organization (UNESCO) elaborated a detailed report assessing the implementation of the first evaluation round for teachers (UNESCO, 2015<sup>[43]</sup>). Echoing the report's conclusion regarding the challenges of the appraisal process, the following concerns were signalled to the OECD team. First, the initial design of the appraisal itself required teachers to take a long test (up to 8 hours) on a computer (some teachers may not have the skills to properly use it), sometimes in dire conditions because the testing centres were far or did not offer the proper conditions for a test. The items on the first iteration of the test were sometimes considered inappropriate to assess teachers' pedagogical and professional knowledge (for instance, some actors considered that too much importance was granted to administrative questions as compared to pedagogical items).



Overall, education professionals complained about the lack of information and support offered for them to prepare for the appraisal. The professionals that the OECD team met while on visit appreciated the help they could get from the school leaders and colleagues to prepare for the appraisal, yet most acknowledged that the appraisal would be hard to take if a candidate could not count on the same support. Finally, actors both in favour and opposing appraisal emphasised to the OECD the mismatch between the obligation for teachers with unsatisfactory results to improve their knowledge and practice through professional development and the mentoring and development options actually available.

In response to the criticisms, the INEE made the 2016 iteration of the appraisal voluntary, except for those education professionals who did not previously obtain favourable results. Almost 87% of education professionals still followed an appraisal process that year. This gave the institute the time to re-design the test for 2017, based on reports such as that of UNESCO, internal reflection and consultation with relevant actors in the system. With this new model, the INEE reintroduced the mandatory nature of the professional performance appraisal (OECD, 2018<sup>[8]</sup>). The new performance appraisal model consists of:

- A report on the fulfilment of the professional's (teacher, school leader or supervisor) responsibilities. In the case of teacher appraisal, both the teacher and his/her school leader fill a questionnaire which they can upload to a website.
- A teaching project (or of school management, or advice and support) including pedagogical planning (or school/zone work plan), intervention and reflection on practice. The project lasts for eight weeks and is elaborated and realised by the professionals themselves in their school. Each professional receives training and has access to academic and technical guides according to his/her function.
- A sit-in exam on pedagogical knowledge, curriculum and disciplines, and legal and administrative knowledge related to the profession. The test takes about four hours to complete and teachers can choose the testing centre. Support for preparation includes the offer of continuous professional development in pedagogical and disciplinary knowledge; informal support from the school leader and other teachers, depending on the schools (as reported during the OECD visit). In addition, participants had access to the guidelines that would be used by evaluators to mark their projects as well as simulating exercises. The test has between 100 and 120 items.

The first two components (the report and the teaching project) allow for appraising teachers in their context. These context-sensitive items make up 60% of the total appraisal, while the sit-in exam aims to evaluate the basic knowledge that all teachers are expected to master, no matter where they teach (40% of the appraisal).

The new appraisal model was used for the first time in 2017. In 2017/18, 149 632 education professionals took part in the performance appraisal, of which 137 714 in primary and lower secondary education and 14 918 in upper secondary education (EMS) (data provided by the SEP to the OECD). By then, the SEP had started providing online preparation courses for basic education teachers called for the performance appraisal: one course about planning for teachers (*Proyectar la enseñanza*), one about management for school leaders (*Proyecto de gestión*) and one course about advice and support for supervisors (*Proyecto de asesoría y acompañamiento*). In 2017, more than 147 000 professionals followed these courses, exceeding the SEP's initial target by 20% (information provided by the SEP to the OECD).

Overall, the principles behind these appraisal processes are based on international evidence. The literature provides some suggestions as to what effective teacher evaluation systems consist of in order to improve the teaching practice in the classroom and support learning. Researchers advocate using common standards and metrics to build effective teacher evaluation systems. Professional teacher standards provide a comprehensive definition of what a good teacher should know and be able to do (OECD, 2013<sup>[35]</sup>). They guide important areas of teacher policy, such as the development and evaluation of initial teacher education and professional development, and they help to ensure the effectiveness of appraisal, by providing the standards to assess teaching and ensuring fairness and reliability in appraisal. Standards also help teachers to understand what is expected of them and what they should be working towards at different stages of their career. Standards thus allow for clarifying what is expected in terms of teacher performance, as well as directing them towards the training options appropriate to the skills or knowledge they need to develop or improve (Behrstock-Sherratt and Jacques, 2012<sup>[44]</sup>). OECD countries tend to place central emphasis on how teachers can mobilise these attributes collectively to enable learning in different domains of their professional work. In addition to the progress made already by Mexico in the creation of standards, the country can reinforce its use to guide training strategies as well. For example, Danielson's Framework for Teaching provides a good indication of the components that should be appraised in teaching (see Box 4.5).

#### **Box 4.5. Danielson's Framework for Teaching**

The framework has influenced many countries' teacher appraisal systems and groups teachers' responsibilities into four main areas, with each component including several elements to appraise:

- Planning and preparation: demonstrating knowledge of content, pedagogy and students; selecting instructional goals; designing coherent instruction; assessing student learning.
- The classroom environment: creating an environment of respect and rapport; establishing a culture of learning; managing classroom procedures and student behaviour; organising physical space.
- Instruction: communicating clearly and accurately; using questioning and discussion techniques; engaging students in learning; providing feedback to students; demonstrating flexibility and responsiveness.
- Professional responsibilities: reflecting on teaching; maintaining accurate records; communicating with families; contributing to the school and district; growing and developing professionally; showing professionalism.

Source: OECD (2013<sup>[35]</sup>), *Synergies for Better Learning: An International Perspective on Evaluation and Assessment*, <http://dx.doi.org/10.1787/9789264190658-en>.

#### *Matching teachers' appraisals with support for better learning*

Mexico's efforts to use teacher performance appraisal for formative purposes (i.e. to enhance the quality of teaching professionals) lie at the heart of international evidence on the effectiveness of appraisal. The main purpose of teacher appraisal is to improve

teaching so that there is effective student learning. Teacher appraisal is a way to ensure that students are taught by quality professionals, in their right to a good education, and are protected from underperforming teachers (OECD, 2005<sup>[32]</sup>). This requires a system for teacher appraisal that enables teachers to receive regular feedback on their professional practice, indications on where to improve and how they can do this, through links to professional development.

Formative appraisal can take different forms. In addition to more formal appraisal systems, TALIS analyses suggest that both teacher job satisfaction and self-efficacy are associated with meaningful teacher appraisals and feedback systems, and with participation in certain forms of continuous professional development.

According to international evidence, a teacher appraisal system that has an improvement component (emphasising developmental evaluation) and a career progression component (a model of certification of competencies for practice within and across career paths, associated with career advancement and based on a greater variety of instruments) can help to strengthen the teaching profession (OECD, 2018<sup>[8]</sup>; OECD, 2013<sup>[45]</sup>). Experts specify that if evaluation results come without options for professional development, teacher assessment is nothing but a missed opportunity to improve learning, whatever the type of evaluation: the evaluation process in and out of itself is not enough to improve teacher performance (Goe, Biggers and Croft, 2012<sup>[46]</sup>).

To ensure that the appraisal system has an improvement component, the SEP made specific efforts to take teachers' opinion into account as it redesigned its annual National Strategy for CPD (*Estrategia Nacional de Formación Continua de Profesores de Educación Básica y Media Superior*). The results of a survey of 92 884 teachers communicated to the OECD team in June 2018 clearly showed the demand for pedagogical training: 40% of the teachers surveyed asked that pedagogical training modules be strengthened. In 2017, more than 144 000 education professionals signed up for at least one CPD programme offered by the SEP following their participation in one of the SPD mechanisms (i.e. entry, promotion or permanence) (data communicated by the SEP to the OECD team).

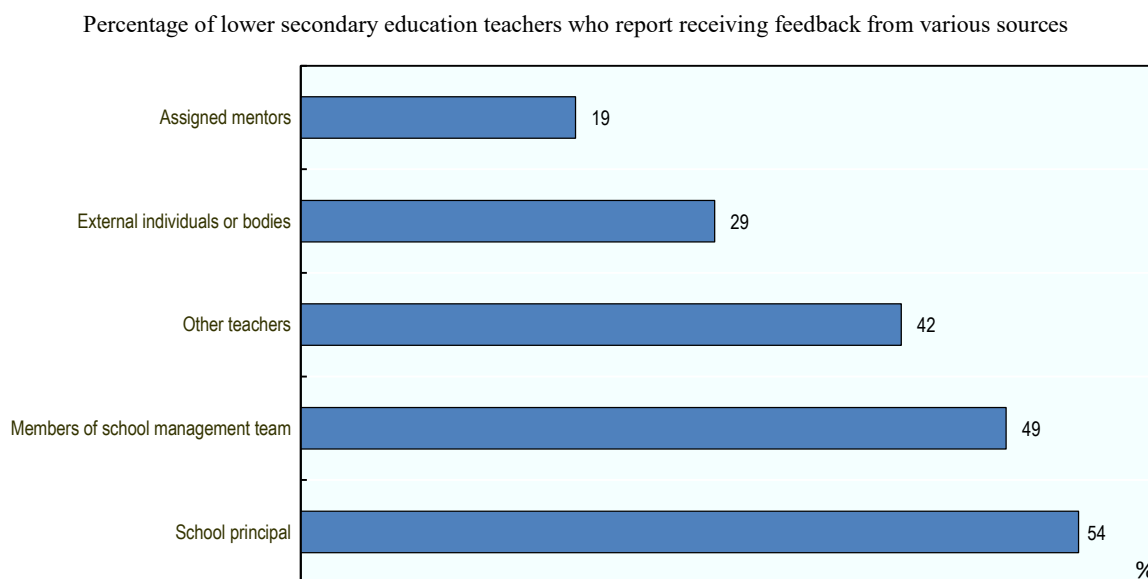
These initiatives for continuous professional development and training are appreciated but appear insufficient to respond fully to the needs of education professionals. A widespread criticism of the teacher appraisal was the lack of a coherent offer for continuous professional development and training that could respond to the needs for development revealed in teachers' appraisal results. At the beginning of the reform process, the SEP transferred the responsibility for professional development from its General Direction for Continuous Training to the National Coordination of the Teacher Professional Service (CNSPD). The CNSPD had just been created and also bore responsibilities in the operation of the teacher appraisal, which took a lot of time and resources to coordinate. As a result, the CNSPD was not prepared to undertake training policies and programmes. Eventually, the SEP reinstalled this office and its functions into the ministry but this led to a serious delay in the implementation of training programmes for teachers, thus partly hindering the formative power of teacher appraisal.

Other concerns acknowledged by the SEP include issues inherent to online training. First, online courses cannot replace face-to-face interaction with a tutor, coach or a fellow teacher. To try and enhance the follow-up and tracking of teachers' professional development, the Under-Secretariat for Upper Secondary Education (*Subsecretaría de Educación Media Superior*, SEMS) was planning on putting two tracking mechanisms in place: one to allow state authorities to track their teachers' performance and progress with

CPD (*modulo de seguimiento*); and the other for teachers themselves to keep track of their progress (*Kardex*) (information communicated to the OECD team during its visit in June 2018). Finally, professionals in remote or disadvantaged areas may not have access to the technology necessary to take online professional development courses in proper conditions. One remaining challenge is thus to find alternatives to guarantee that these teachers, school leaders, supervisors and support staff.

Ensuring that appraisal systems have feedback mechanisms is also key for the success of the system. As illustrated in Figure 4.5, appraisals and feedback can come from a number of sources: the school leaders, peer teachers, an external evaluator, mentors or others (OECD, 2014<sup>[9]</sup>). TALIS suggests that in many countries, teachers who report having received appraisals from more than one evaluator tend to report higher levels of job satisfaction and self-efficacy, suggesting that teachers value receiving feedback on their work by multiple sources. According to TALIS, before 2013, teachers in Mexico reported for the most part that teacher appraisal and feedback were largely done to fulfil administrative requirements (45%) and that they had little impact upon the way teachers teach in the classroom (40%) (OECD, 2014<sup>[9]</sup>).

**Figure 4.5. Teachers' feedback by source of feedback, 2013**



*Note:* Feedback is defined broadly as any communication of the results of a review of an individual's work, often with the purpose of noting good performance or identifying areas for development. The feedback may be provided formally or informally.

*Source:* OECD (2014<sup>[9]</sup>), *TALIS 2013 Results: An International Perspective on Teaching and Learning*, <http://dx.doi.org/10.1787/9789264196261-en>.

StatLink  <http://dx.doi.org/10.1787/888933041782>

There are different types of feedback, which can include self-evaluation, informal peer evaluation, classroom observation, and structured conversations and regular feedback by the principal and experienced peers. Designed mainly to enhance classroom practice, such types of appraisal would provide regular opportunities for teachers' work to be recognised and celebrated and help both teachers and schools to identify professional development priorities (OECD, 2005<sup>[32]</sup>).

Studies have found that observation scores can also provide feedback to teachers, as these are predictive of student achievement gains (Grossman et al., 2010<sup>[47]</sup>; Jacob and Lefgren, 2008<sup>[48]</sup>; Kane and Staiger, 2012<sup>[49]</sup>; Rockoff and Speroni, 2010<sup>[50]</sup>; Kane et al., 2011<sup>[51]</sup>). Other studies have shown that teacher performance does improve in response to evaluation (Taylor and Tyler, 2012<sup>[52]</sup>). The Gates Foundation Report on Designing Teacher Evaluation Systems shows that a balanced approach which incorporates student survey data and classroom observations has two important advantages: ratings are less likely to fluctuate from year to year and the combination is more likely to identify teachers with better outcomes on assessments other than state tests (Kane, Kerr and Pianta, 2014<sup>[53]</sup>). TALIS data suggest that receiving feedback from student surveys and student test scores is associated with greater job satisfaction and self-efficacy in most TALIS countries. Again, in most countries, teachers who receive feedback on classroom management also reported greater job satisfaction and the association is strong in half of these countries (OECD, 2014<sup>[9]</sup>).

The efforts made by Mexico to build professional learning communities, to enhance collaboration between peers and to reinforce pedagogical leadership in school leaders' and supervisors are promising initiatives to increase the possibility for teachers to receive constructive feedback. As pointed out, however, there is still some progress to make for this feedback and collaborative learning culture to take root in all schools.

Finally, with regards to the permanency in the profession, evidence shows that there needs to be simple, transparent and accepted procedures for dealing with ineffective teachers. Although the number of such teachers has proved to be small in Mexico, as those who have not passed have been a minor proportion, the issue can cause concern not only for schools and the general teaching force but also for the poorly performing teachers themselves. The introduction of more rigorous approaches to selection and probation before teachers are granted tenure in Mexico, as well as ongoing, regular formative teacher evaluation, will prevent low-quality teachers from entering and remaining in the classrooms. The focus, as has been designed in Mexico, needs to be on regular, ongoing teacher appraisal providing clear and constructive feedback to teachers on their performance and jointly identifying appropriate developmental strategies. However, as suggested from international evidence, if improvements do not occur, processes should exist to move ineffective teachers either out of the school system or into non-teaching roles. It would be important for authorities external to the school, including representatives of the teaching profession, to become involved in decision making and for appeal mechanisms to protect individual teachers' rights (OECD, 2005<sup>[32]</sup>) taking into account children's right to quality education.

Overall, from the intended reform objectives in Mexico to improve quality and equity in education, the different components of the teacher career and appraisal system will have little value if they do not lead to the improvement of student learning and classroom practice. The different evaluation and assessment components need to be geared towards this path. There are often challenges in communicating the ultimate objective of evaluation and assessment and this has been perhaps one of the major challenges of this component of the education reform in Mexico. This is why it is important to have a more constructive view of evaluation and assessment that brings together the different components focused on ensuring the professionalisation of the teaching workforce through processes than grant transparency and support in the entry, selection and permanence of the profession. The ultimate objective is for students to have the best possible teachers in Mexico.

## Recommendations for future policy development and implementation

Mexico has made significant progress towards transforming schools into learning communities and implementing concrete efforts to introduce a professional teacher service. The School at the Centre strategy (*La Escuela al Centro*) was created by the SEP to give coherence at the school level to Mexico's 2013 reform priorities and reorganise school support programmes accordingly. It aims to reduce the bureaucratic load for schools and guarantee that they have the skills and resources to foster active participation and collaboration within the school community, with the purpose of enhancing educational outcomes. The strategy reflects Mexico's intention of building capacity within schools and local governments as a key enabler to transform schools, supporting the development of a stronger teaching workforce and improving the education system overall. Principals, teachers and other pedagogical support staff such as Mexico's new school improvement support service (SATE) are active agents of this transformation in the schools.

At the same time, the Teacher Professional Service (*Servicio Profesional Docente*, SPD 2013) has established a framework for the educational profession, including teachers, school principals, vice-principals, co-ordinators, supervisors, inspectors and technical pedagogical advisors (*asesores técnico-pedagógicos*, ATP). It sets out the basis for selection, induction, promotion and tenure possibilities, as well as for continuous professional training for educational staff. The SPD aims to guarantee knowledge and capacity for educational staff and bring into a coherent whole several elements that reward good performance and improvement, and provide incentives for both schools and individuals.

Still, there is scope to further develop both policies to ensure that they contribute to effectively support teachers and schools towards enhancing student learning. More concretely, Mexico might consider taking action in the following: i) strengthen leadership and school-level collaboration to enact the School at the Centre strategy; ii) promote the career perspective of the Teacher Professional Service; iii) prioritise continuous professional development and the SATE to grow education professionals' quality; and iv) keep adjusting the professional performance appraisal to deliver on both its formative and summative functions.

### ***Strengthen leadership and school-level collaboration to enact the School at the Centre strategy (La Escuela al Centro)***

Mexico should continue its efforts to bring together the different programmes and strategies that land at the school level by ensuring that schools are ready to make them happen. This requires enhancing school leaders' skills and their capacity to make decisions. To reinforce the efforts and achieve more effective school autonomy, leadership, teaching practice and, in general, support quality and equity in education, some aspects can be considered:

- **Keep sharpening the skills of school leaders, supervisors and support actors such as the ATPs.** The SEP has made a significant step in this direction with the creation of specialised online courses and certification programmes, as well as the formalisation of the promotion mechanisms for teachers to take on new positions. Currently, becoming a school leader or a supervisor requires going through a teaching career first. These roles have common characteristics but require some specific skills – skills in management and leadership in the cases of supervisors

and school leaders. Leadership, management and advisory skills develop with time and practice, and these professionals will need additional support as they take on a more prominent role in educational improvement.

Mexico could thus strengthen its offer of continuous professional development programmes directed at leadership and advisory figures, to make sure it meets the needs for skills and knowledge and that it adapts to schools' local context. It is important to acknowledge that no single set of competencies will be effective in all school and social contexts. Different types of skills will be required, for instance, to lead small rural schools and large urban centres. Leaders thus need both generic and locally contextualised skills. The literature suggests that successful continuous development programmes are research-based and coherent with the curriculum, and provide experience in real contexts, using cohort grouping, mentorship and collaborative learning structures between the programme and the schools (Pont, Nusche and Moorman, 2008<sub>[25]</sub>).

The SEP and some state authorities have been promoting such collaborative learning structures, which it should strengthen to guarantee that all schools can grow with those (see the recommendation on strengthening professional collaboration at school level). Similarly to Mexico, education systems have come to acknowledge the important role school leaders, supervisors and support actors play – or could play – in school improvement (OECD, 2010<sub>[13]</sub>; Pont, Nusche and Moorman, 2008<sub>[25]</sub>). In general, leadership training covers a range of aspects of school management and educational leadership. However, tailored training programmes may also focus on contextual factors that leaders need to take into account at the national, regional, local and school levels. Australia, Austria, Chile, England, Finland, Ireland, New Zealand, Northern Ireland, Slovenia and Sweden systematically offer in-service training programmes to school leaders.

- **Strengthen professional collaboration within and between schools.** National and regional authorities should help schools grow a culture of collaboration, so all may progress as learning communities. Existing collaborative structures have been promoted within the new educational model. However, it takes times to install the group culture necessary for professional collaboration and learning to happen at the school level. Peer collaboration, collective efforts, communication, linkages to the community, student collaboration and local-regional-national collaboration are just a few forms collaboration can take.

The key structures for collaboration within the schools are: the CTE and more generally the pedagogical team composed of the school leader, teachers and potential school ATPs; and the SATE. While operating at supervision level, the SATE will be in a unique position to advise the school's pedagogical team. Mexico is currently at the beginning of its efforts to professionalise the leaders in their strategic pedagogical positions. In this context, the OECD observed that school staff collaboration depends on the capacity of the school leader and teachers as pedagogical entrepreneurs. The supervision units (*supervisiones escolares*) and the SATE are also key to facilitate professional exchanges between schools within the same school zone. They are not the only mechanisms, however. The Learning Between Schools initiative also holds great potential to promote collaboration between schools and should be pursued and institutionalised in every school zone.

### *Promote the career perspective of the Teacher Professional Service*

The professional performance appraisal has focused a large share of the attention on the teaching profession, to the expense of other career items included in the Professional Teacher Service (SPD). To keep strengthening the professionalisation of educational careers in Mexico, it would be important to also focus on other components of the Professional Teacher Service that contribute to professionalisation as essential for an education system to fulfil its mission (OECD, 2010<sup>[13]</sup>; Santiago et al., 2012<sup>[4]</sup>). Mexico's education authorities should support further actions to show that the SPD is a coherent career structure beyond evaluation for education professionals. To this extent, relevant authorities should:

- **Ensure that mentoring (*tutoría*) takes place for all new entrants in the teaching profession, as well as for new school leaders, supervisors and ATPs.** Recruiting and training tutors takes time and resources, but central and state authorities should guarantee that the professionals taking up a new position actually benefit from the mentoring they are legally entitled to. Failing to provide this mentoring could prevent new teachers from developing the pedagogical skills they need to know to help on their learning journey. Mentoring is crucial during the induction period of teachers. Mentors are key actors to help new teachers transition from initial education to practice at the school level (Santiago et al., 2012<sup>[4]</sup>). Some states took concrete measures to make sure a majority of new entrants could have access to a tutor of quality. Puebla for example has been a pioneer in providing mentorship to new teachers: in 2017/18, 1 841 mentors (*tutores*) tutored more than 3 000 new entrants. At the beginning of the 2017/18 school year, the state's centres for school advice and support (*Centros de Asistencia Técnica a la Escuela Poblana*, CATEP) delivered a workshop on how to tutor new teachers, and the People's University of Puebla State (UPAEP) offered a tutoring certification programme (120 hours) (SEP, 2017<sup>[54]</sup>). These and other relevant examples could be given more visibility throughout the regions, so state authorities can learn from each other and find solutions to guarantee support for new entrants.
- **Certify that new entrants from another career than education have pedagogical skills or have access to extra pedagogical training upon entry.** Recent results on the entry exam for teachers have shown that candidates who did not pursue initial teacher education (*normales*) tend to score lower on pedagogical questions, even if they have another degree in higher education (information communicated by the SEP to the OECD team). It appears important to pay particular attention to these candidates if they enter the profession. One option is to require these candidates to sign up and pass basic courses in pedagogy and education fundamentals before they can be confirmed in their position. This would come as a complement to the two years of mentoring. In France for instance, the entry mechanism also allows entry for students from other career or professionals with a background other than in education. These candidates are required to sign up to some courses in teacher colleges (*Écoles Supérieures du Professorat et de l'Éducation*, ESPE in France) for one or two years and to alternate between courses and practical experience in the school they are affected to for their induction period, after they pass the entrance exam (Ministère de l'Éducation, n.d.<sup>[55]</sup>).



- **Guarantee that the training and promotion components of the SPD are effectively implemented.** During the visit, the OECD team noted that some considered that the SPD has mainly focused its efforts on the accountability aspects of the appraisal. There is a considerable risk that an excessive focus would contribute to the teaching profession losing motivation to participate and could hinder authorities' efforts to build trust in the SPD. To prevent this, it is important that the SPD invest more in the implementation of its training and promotion instruments and build coherence between the different components of the SPD.

***Prioritise continuous professional development and the SATE to grow education professionals' quality***

To support career development and enhance quality in education, national authorities introduced a new national training strategy for teachers, school leaders, supervisors and advice and support staff. While training has reached many through face-to-face modalities and virtual platforms, interviews by the OECD team revealed a demand for training to be better tailored to the schools and to their teachers' needs. This is consistent with the literature, which finds that the most effective training strategies contain a mix of modalities: online and in-person programmes, and courses outside of the schools with supervised projects in the schools (OECD, 2014<sup>[9]</sup>). It appears **that professional development opportunities have not yet evolved to meet the need for skills and knowledge update. Recent efforts to strengthen the national strategy for professional development must be acknowledged. However, the offer needs to improve in order to allow teachers, school leaders, support and advisory staff and supervisors to grow as professionals.**

In this regard, it is important to ensure that teacher professional development elements form a coherent whole and are directed towards the improvement of classroom practices and student learning. In this sense, Mexico could:

- **Enhance professional development at the school level via collaborative learning and the SATE.** As it progresses in its implementation, the SATE must be able to give school teams advice on how to use their professional interactions as a key tool to grow professionally, and to lead and participate in their school's improvement initiatives.
- **Balance the modules in the national and the state strategies for education staff development (*estrategias de formación docente*) between in-person, school-based and remote (online) options.** A pioneer in reforming the state strategy for education professionals' development, the state of Puebla designed its basic principles for the development of training programmes in compulsory education, which could be considered an example for other states to follow and apply when revising their own strategies (see Box 4.6).
- **Make sure offers for continuous professional development align and are clearly linked with the professional standards (*Perfil, Parámetros e Indicadores (PPI) para Docentes y Técnicos Docentes, PPI para Personal con Funciones de ATP and PPI para Personal con Funciones de Dirección y de Supervisión*) and with the knowledge and skills required by the new curriculum.** For instance, the first dimension in the primary teacher profile (SEP, 2018<sup>[56]</sup>) describes the "good" teacher as one who organises his/her work around his/her students' learning; develops didactical strategies to help his/her students

learn; uses student-learning assessment in a formative purpose; and builds an environment that is conducive to learning. Some training programmes already exist in Mexico for these elements. There is no guarantee that all are available to the teachers who need to reinforce these skills or that teachers know how to look for each training component. As states revise the training modules and other coaching programmes offered locally, they should strive to facilitate access to the training offer. For instance, each state could have an online platform where certified training providers' offers are labelled according to the terms used in the PPIs (including the modules offered by the national and state Secretariats for Public Education), to facilitate the search by education professionals.

**Box 4.6. Basic principles for the development of training programmes for compulsory education staff (*Estado de Puebla*)**

- Use diagnostic evaluations to understand the needs in terms of training, and design the modules based on these.
- Offer mainly in-person training.
- Do not overwhelm learners with “cascade training” (training model where the first cohort trained become the teachers of the next cohort).
- Offer peer training (*entre pares*) with coaches/mentors who have experience in the public education system.
- Choose training partners who prioritise collaboration over commercialisation.
- Limit the groups' size to 25 learners maximum.
- Favour regional deployment of training.

*Source:* Secretaría de Educación Básica del estado de Puebla (2017<sup>[57]</sup>), *Reunión para Elaborar el Programa Académico de Formación Continua para el Servicio de Asistencia Técnica a la Escuela y Tutoría*, <https://dgfc.basica.sep.gob.mx/multimedia/RSC/BASICA/galerias/85/201710/85-3-201710-FILE-uc95cnY7Ck-PUEBLA.pdf>.

***Keep adjusting the performance appraisal to deliver on both its formative and summative functions***

Appraisal of teachers – and of school professionals in general – can contribute to improvement in educational outcomes by holding education professionals accountable (summative function) and by revealing their strengths and areas for professional progress (formative function) (OECD, 2010<sup>[13]</sup>). In both instances, performance appraisal is only a tool for educational improvement and should therefore constantly be adjusted to fulfil its role. In order to guarantee that professional performance appraisal fulfils its improvement role, Mexican authorities should:

- **Make sure the appraisal instruments are adequate to assess performance.** Gathering multiple sources of evidence about professional practice meets the need for accuracy and fairness of the appraisal process, taking into account the complexity of what a “good” teacher, school leader, supervisor or advisor should know and be able to do. In the case of teacher appraisal, the most frequently used instruments are classroom observation, interview/dialogue with the teacher,

teacher self-appraisal and portfolio (OECD, 2013<sup>[35]</sup>). The current 60%-40% split between contextualised appraisal instruments and the standardised exam allows for balance in the teacher performance appraisal. This balance should be sustained and used as a lever to enhance trust in performance appraisal. In the case of appraisal of teachers, for instance, Mexico could consider performing in-school and in-class observations with local resources throughout the year. The results of these frequent observations could be part of an enlarged joint responsibility report by the professional being appraised and her direct superior.

Classroom observations are likely to be among the most relevant sources of information about professional performance, as most key aspects of teaching are displayed while teachers interact with their students in the classroom. They also appear to be the most common source of evidence used for teacher appraisal and are a key element in school evaluation. The school leader, or a member of the leadership team, typically undertakes classroom observation but a greater variety of professionals can get involved. In Chile, teachers are interviewed by a peer evaluator, the school leader provides his/her own written report, and a 45-minute class is video-recorded and then evaluated in an evaluation centre run by the national institution responsible for teacher appraisal. Only teachers who have been previously rated as “outstanding” or “proficient” can apply to become peer evaluators. Box 4.7 gives the example of teacher appraisal in Chile, which relies heavily on evaluation by peers and has required building capacity at a large scale.

#### Box 4.7. Building capacity for peer appraisal in Chile

One of the characteristics of **Chile’s** teacher appraisal approach (*Docentemás*) is the high involvement of practising teachers as evaluators. The participation of teachers at various stages of the appraisal process contributes to building ownership and appraisal competency among teachers and may also help them to understand and benefit from their own appraisal to a greater extent. Practising teachers can apply to two key roles in the appraisal process: i) as evaluators of teacher portfolios in one of the centres set up for this purpose by *Docentemás* in various universities; and ii) as peer evaluators who conduct peer interviews and participate in the municipal evaluation commissions.

For both roles, intensive preparation processes have been set up to build the capacity of those selected. The portfolio evaluators are trained in a one-week training session, where they work together with specialists on concrete examples of different performance levels. The training sessions comprise individual and group work in which teachers discuss judgments about proficiency levels. This is followed by a test period where the evaluators apply what they have learned, internalise the portfolio evaluation processes and benefit from group discussion about the results. The peer evaluators are selected and trained by the national *Docentemás* team or the local university in charge of the process. Only teachers who have been previously rated as Outstanding or Proficient can apply to become peer evaluators. They receive training in two full-day seminars, during which they learn about the six questions to be asked in the interview and the rubrics to be applied in assigning performance levels. The training also includes exercises and feedback to the participants. At the end of this training phase, there is another selection process and not all of those initially selected will be retained as peer evaluators.

Source: OECD (2013<sup>[35]</sup>) *Synergies for Better Learning: An International Perspective on Evaluation and Assessment*, <http://dx.doi.org/10.1787/9789264190658-en>.

While high-quality observations appear to be related to increases in student learning outcomes, this relationship is highly dependent on having excellent instruments and well-trained observers (OECD, 2013<sub>[35]</sub>). The authorities in charge of developing the standardised teacher exam have been involving 50 000 teachers since the first appraisal sessions, to engineer the questions and make sure they properly assess teacher performance. As the new curriculum progresses in its implementation, the items on the exam should be revised so the questions also measure the new knowledge required of teachers for the success of this curriculum.

- **Offer better-tailored support for education professionals after they receive the results, to update their knowledge and develop their professional skills.** If the professional performance appraisal is to be better accepted, relevant authorities need to build confidence in the process and use the appraisal results in a constructive way for education professional development. Support is especially important in those cases where appraisal is still perceived as a sanction rather than a tool to orientate professional development. Appraisal results should be used as one core input to guide individual and national strategies for continuous professional development, as well as the schools' improvement route, which gives its formative function to the appraisal. Other inputs for these strategies include teachers' and school leaders' opinions; and national and local needs for development.

Depending on the strategic level, Mexico already disposes of a large array of tools to collect, analyse and diffuse appraisal results. For instance, the SIGED (*Sistema de Información y Gestión Educativa*, the system for educational information and management) has made significant progress in its implementation and should be put to use. The constantly updated platform could inform states about which training offers to add to their catalogue to respond to the needs expressed in their teachers' results. At the school level, school leaders and teachers should have access to their results either online or through the individual form they receive after their appraisal. The teams could share their results to plan their professional development as a group in CTE sessions, using the Improvement Route (*Ruta de Mejora*) as a collective planning tool.

Chile may be an example to look at, as a system that makes extensive use of appraisal results for development. The Chilean system systematically uses results in a professional development plan for teachers who have obtained a "basic" or "poor" rating. Memphis, Tennessee, in the United States has developed a system that explicitly links professional learning to teacher appraisal. In Memphis City Schools, appraisal is based on teaching standards and professional development is linked to teachers' competency in the standards. Thus, a teacher who has poor performance on a specific indicator can find professional growth opportunities related to that specific need. Memphis City Schools publishes a professional development guide each year that lists the professional growth offerings by standard and indicator. In addition, most of the professional development courses are taught by Memphis City Schools teachers, thus ensuring that the course offerings will be relevant to the contexts in which these teachers work (OECD, 2013<sub>[35]</sub>). The following example can be helpful in developing these mechanisms. In the United States, the New York State United Teachers union started the Teacher Evaluation and Development (TED) system, which is approved at the state level for district use. TED integrates in-service learning activities within a

four-step evaluation cycle that is repeated yearly. In TED, teachers first reflect on their own performance and practices in the classroom. They then collaborate with the evaluator to collect evidence on their teaching practices and outcomes, analyse the data collected and exchange viewpoints on what they mean for their effectiveness as a teacher. During a summative evaluation, this evidence is put together with proof of student achievement and the evaluator gives a score and recommendations for professional growth, based on which the teachers and their administration build individual learning plans (Coggshall et al., 2012<sup>[58]</sup>; NYSUT, 2012<sup>[59]</sup>).

- **Maintain the summative function of the appraisal while making sure that the professionals that obtain unsatisfactory results have access to programmes that give them the opportunity to improve between appraisals.** Underperformance in regular appraisal of performance management most frequently leads to compulsory training and further appraisal. In many countries, it may also have an impact on contract, career advancement or salary levels. In Australia, Austria (in extreme cases only), some provinces/territories in Canada (at the discretion of the evaluator), Chile and New Zealand for example, there is the possibility for underperformance to lead to transfer, suspension or dismissal of the teacher. This report mentioned the concerns expressed in Mexico about the insufficiency of the professional update and development options offered in the case of a teacher obtaining “unsatisfactory” results. As national and state authorities keep updating their strategies for continuous professional development, those education professionals should be given some priority, by enriching and clarifying the offer of training modules, mentoring programmes and other alternatives for building knowledge.

## Notes

<sup>1</sup> An administrative vice-principal (for schools with more than six groups) and an academic vice-principal (for schools with more than ten groups).

<sup>2</sup> There are four major programmes related to the Teacher Professional Service: i) admission and promotion evaluations; ii) performance evaluation; iii) a National Strategy for Continuing Education of Teachers of Basic and Higher Education; and iv) a programme to strengthen and transform teachers’ colleges (*normales*).

<sup>3</sup> The kind of project varies according to the role: for school leaders, this should be a project on management practice for schools; for supervisors, a project on advice and support for schools.



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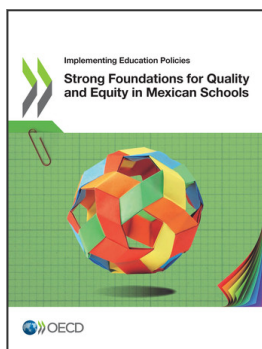
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