Chapter 4
Policies for Teacher Professionalization in Mexico's Education Reform

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Abstract This chapter examines the role of teacher and principal professional development introduced as one of the five central elements of the 2012 Reforma Educativa (RE), a large-scale education reform that sought to profoundly alter the Mexican educational system. Chief amongst the reform's objectives was regaining governmental control of the education sector from the powerful teacher unions; this was meant to inject accountability into all facets of the system and reprofessionalize a weak teaching force through higher barriers of entry, in-service teaching assessment, and widely available and effective professional development activities. The theory of change underpinning these actions was that these measures would improve student learning outcomes and better prepare young people for success in the twenty-first century. Political considerations hindered the RE's ability to achieve these ambitious goals. A lack of engagement with key stakeholders, especially unionized educators, before the RE was signed into law resulted in an illogical implementation sequence in which revamped teacher and principal professional development was preceded by educator evaluation. This initial focus on evaluation allowed opponents of the RE to cast it as punitive toward teachers and not in the best interest of educators. Spaces that allowed teachers to exchange best practices, develop pedagogical techniques, and more actively participate in governance and planning of school communities were welcome innovations in efforts to improve teacher professional development. However, bureaucratic obstacles, political pushback from unions, weakness in the supervisory component, and inconsistent implementation among local authorities ultimately prevented these initiatives from achieving their intended effects.

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Article 3 of the Mexican Constitution states that education should be public, secular and free, as well as scientific and absent of discrimination in its pursuit of "optimal human coexistence" and the "maximum academic achievement of learners" (Mexican Constitution, Carranza, 2017). Through constitutional change, Mexico's Education Reform (abbreviated RE from the initials of the Spanish term, *Reforma Educativa*) sought to profoundly alter the key components of the educational system by providing a definition for quality education. It sought to do so by changing the existing structure of evaluation and promotion; articulating the role of federal and local educational authorities as well as schools themselves, and improving both pre-service and in-service teacher professional development. Reprofessionalizing a weak teaching force was seen as a prime mechanism to boost student learning; in this way, both teacher policies and teacher professional development were central to the reform's aim of promoting higher-quality instruction to catalyze improved academic outcomes and better equip students for success in the modern world.

The results of the 2012 administration of the Organization for Economic Cooperation and Development (OECD) Program of International Student Assessment (PISA) were released the same year the reform was introduced. The detailed report for Mexico revealed that, while student knowledge and skills as reflected in the 2012 test scores had increased relative to levels in 2003, the average level of student achievement on the tests, 413 points on a scale normed to average 500, was still well below, almost a full standard deviation, the OECD average of 494 (OECD, 2013). Further, 55% of Mexican 15-year-old students did not meet the minimum achievement benchmark in mathematics, meaning that between Mexico and the OECD average, there was a two-year gap in mathematical knowledge (Cabrera Hernández, 2018). This gap was much greater relative to high-performing countries. Compared to student knowledge and skills in Shanghai, the highest-ranking PISA participant in the mathematics assessment, the gap between Mexican students and their counterparts in the top-performing OECD member state increases by two more years. This indicates that the math skills of 15-year-olds in Mexico are, on average, four years behind the math skills of 15-year-old students in Shanghai and other high-performing countries (OECD, 2013). The low levels of knowledge and skills of students were confirmed in other assessments, Mexico's national curriculum-based assessment of student knowledge and skills, the National Plan for Evaluation of Knowledge (PLANEA), demonstrated overall low levels of achievement as well as significant inequality between the learning outcomes of students in urban and rural areas, between students in more affluent and less affluent states, and between students of different socio-economic groups. More than half of the students scored in the lowest level of knowledge in the assessment of Spanish language and communication, while nearly two-thirds of pupils did not achieve past the lowest level in mathematics (INEE, 2015). These dismally low levels of student outcomes on both international and national assessments furthered a pre-existing perception that teachers were the reason for underperformance, and the reform was proposed as an effort to remedy this perceived deficiency (Tirado, 2018).

It is in this context that Mexico's RE was introduced in 2013. The stated objectives of the RE were to ensure quality education for all Mexican students; bolster equity

and inclusion by closing gaps in access; and promote a shift in the school community paradigm, focusing especially on increasing social participation and parental investment in improving the educational system (SEP, 2017a). To meet these challenges, the reform created the New Educational Model (NME), a set of standards, as well as an updated curriculum, with new pedagogical guidelines and community engagement activities designed to foster continuous dialogue between school-level stakeholders to impact practice at the classroom level. The reform also reasserted governmental control over the educational sector and instituted evaluation mechanisms to introduce accountability in the teaching profession (SEP, 2017a). Finally, professional development was designed to prepare the country's teaching force to be able to meet these new accountability demands and specifically designed teaching standards. The theory of change underpinning these components of the reform was that wrestling control of the educational systems away from teacher unions and empowering communities to actively participate and invest in the educational process would reprofessionalize teachers, empower principals and catalyze better student outcomes aligned with the demands of the twenty-first century. Much of the professional development introduced by the reform coincided with the strengthening of mechanisms that had previously lacked rigor or were absent from the educational system, such as a comprehensive evaluation system and school level initiatives to promote in-service training.

4.1 Chapter Outline

In order to understand these ambitious goals, this chapter will begin the description and analysis of the reform by detailing the mechanisms that it used to professionalize Mexico's teaching force, arguing that, in terms of both curricular and pedagogical strategies, the reform could have been well-positioned to reorient teaching activities and student learning to improve learning outcomes. However, a lack of engagement with key stakeholders, especially educators, before the reform was signed into law, necessitated an illogical sequence of implementation in which teacher and principal evaluation preceded updated teacher training and curricular development. Thus, the reform was largely perceived as punitive toward teachers, lacking sufficient support. Although other support mechanisms of the reform were subsequently implemented, the success of these measures was mixed and their effects were often overshadowed by the strong opposition to evaluation (Schmelkes, 2018).

This chapter details the context that surrounded the introduction and implementation of the reform and describes the work of the National Institute of Educational Evaluation (INEE). Created in 2002 but granted autonomy from the Ministry of Education by the reform, the INEE was responsible for creating the evaluation framework for Mexican principals, teachers and students vital to understanding the RE's push toward accountability (SEP, 2002).

Next will be a description of the implementation of the reform along three axes. The first axis, as mandated by the General Education Law (LGE) and the General

Law of the Professional Teaching Service (LGSPD), was teacher evaluation and the creation of the Professional Teacher Service (SPD). The SPD was designed to professionalize the system of teacher selection and advancement as well as stamp out decades of bad practices and corruption through the establishment of transparent merit-based selection and promotion assessments (Granados Roldán, 2018a). There was a shift in the role of principals and supervisors, as well as a change in the process by which they were selected and promoted. Crucially, neither teacher training nor professional development was properly aligned to or streamlined with evaluation content.

The second axis was the creation and publication of the NME. This chapter will analyze the tools the NME provided for teachers and how it helped promote curricular development.

The third axis was the introduction of measures to shift the paradigm of the education community in order to promote more effective teaching practices that allowed students to develop skills to facilitate their civic and economic participation in the twenty-first century. This chapter will examine the actions taken to catalyze this shift and the obstacles they faced in achieving their intended objectives. School Technical Councils (CTEs) and District Technical Councils (CTZs) were promoted to create a space for teachers and principals to discuss educational practice and school goals. In addition, the SPD created the Technical Pedagogical Assessor (ATP) to facilitate educator-to-educator and school-to-school learning. School Technical Assistance Services (SATE) were organized to promote best teaching practices across regions. Finally, School Social Participation Councils (CONAPASE) sought to foster learning communities where all stakeholders in the educational community were represented.

Finally, the chapter will analyze the successes and shortcomings of the reform on each of the three aforementioned axes, discussing how the reform's theory of change failed to counter a narrative, one largely put forth by specific factions of the country's teacher union and adopted by then-presidential candidate Andrés Manuel Lopez Obrador, that the provision of evaluation was draconian and disrespectful to teachers (López Obrador, 2018). It will conclude by reviewing the RE's main achievements and shortcomings.

4.2 Historical Context

Mexico has experienced a profound political transformation over the past several decades. In 2000, for the first time since the Mexican Revolution, the National Action Party (PAN), helmed by Vicente Fox, won the presidential election against the Institutional Revolutionary Party (PRI), ending a 70-year period of hegemonic party control. This event is often referred to as the beginning of a "democratic-electoral normality" where older power structures had to adapt to a new era of political plurality (Woldenberg, 2012). During the preceding hegemonic party system, interest groups enjoyed the privileges of being connected to those in power (Gindin, 2008). The most power-

ful labor union in the educational sector, the National Union of Education Workers (SNTE), oversaw assignment of teaching positions, promotion decisions and salary allocation. A prime challenge for the reform was replacing this deeply entrenched system, which had captured the education system for political patronage, with a more accountability-oriented approach focused on education results (Nuño Mayer, 2018).

Earlier administrations had attempted to reduce the control the teacher union had on teacher careers, with limited results. In 1993, the then President Carlos Salinas de Gortari began laying the foundations of the teacher career ladder (Gómez Zamarripa and Navarro Arredondo, 2018). In 2002, President Fox created the National Institute of Educational Evaluation (INEE) to provide the public with information on the performance of the education system (SEP, 2002). Both measures were meant to increase accountability of schools to address the enormous social and economic inequalities that hindered Mexico's path toward increased development. The teacher career ladder proved insufficient because the SNTE and one of its most prominent sections, the National Coordinator of Education Workers (CNTE), maintained their influence over key aspects of teacher evaluation, reducing the teacher career ladder to a mere mechanism of political control (Reimers, 2018). The INEE, on the other hand, has proven to be an essential tool in a push toward teacher and principal professionalization as well as objective assessment of the education sector. It has done so by generating guidelines for the evaluation of students, teachers and policies in order to fill a void of information that was historically lacking in Mexico (INEE, 2018a; World Bank, 2018). The INEE's institutional framework measures strengths and deficiencies in the sector and is fundamental to the reform's evaluation component.

In the 2006 presidential election, the unions flexed their political muscle, throwing their weight behind candidate Felipe Calderón of the center right PAN, who defeated Andrés Manuel López Obrador, of the center left PRD, by a narrow margin of 0.56%. This allowed unions to secure continued control over key elements of the SEP during this term. The PAN, both during the Fox and Calderón administrations, continued employing the same governance mechanisms adopted by the PRI rather than breaking the cycle of corporatism that had characterized the PRI's 70 years in power. This was especially evident in the appointment of Fernando González as Undersecretary of Elementary Education in December 2006. González was the son-in-law of Elba Esther Gordillo, the leader of the SNTE. In this way, González's appointment only strengthened the union's influence over educational policy formation.

In 2012, Mexico elected Enrique Peña Nieto of the PRI as president, reinforcing political plurality as the new norm. This created a culture in which political parties understood that dialogue and compromise were necessary to overcome the legislative paralysis that prevented major constitutional reforms (Woldenberg, 2012). A day after Peña Nieto took office, Congress signed the *Pacto por México*, a set of structural reforms meant to promote growth and bring Mexico into modernity. The RE was a cornerstone of this legislative initiative (IFE, 2014).

4.3 The Role of Evaluation in Teacher Professionalization

The reform's theory of change relied on institutional and legal modifications to underpin the three main axes of the reform and catalyze student achievement by aligning curricular goals with 21CC, improving teacher quality, and producing principals well-equipped to take the helm of schools. In 2013, the INEE became an autonomous constitutional body independent of control by the executive branch of government, and thus independent of the Ministry of Education to which it had previously reported (LINEE, 2013). This change was meant to eliminate any conflict of interest and allow the INEE to create an evaluation framework to objectively and independently evaluate all educational activities of the Ministry of Education. This expansion of the INEE mandate allowed it to oversee the union's role in teacher selection and promotion (LINEE, 2013), creating friction between the two bodies that had not previously existed. Additionally, Article 3 of the Constitution and the LGE were both reformed and the SPD, along with the LGSPD, was instituted to create a rigorous system of teacher selection and promotion. Educator evaluation was the central tenet of achieving the reform's stated objective of improving educational quality by diagnosing educators' weaknesses and then using professional development to bolster teachers' pedagogical competencies and principals' leadership abilities. It also created a path to replace union influence over the educational sector with increased governmental control, both at the federal and state levels. Undoubtedly, one of the key tools of the reform was the creation of the SPD, a body responsible for "reprofessionalizing" teacher selection, in-service teacher training and promotion as well as eliminating the aforementioned legacy of decades of bad practices, nepotism and corruption in the appointment and promotion of teachers (Granados Roldán, 2018a).

The theory of change also necessitated updating several facets of the educational model. The NME focused on five areas: (1) the "schools at the center" (*escuelas al centro*) initiative; (2) curriculum; (3) educator training and professional development; (4) inclusion and equity; and (5) governance of the educational system (CIDE, 2016). The curricular component of the NME sought to modernize education and prepare students for the twenty-first century by incorporating cognitive, intrapersonal, and interpersonal competencies into the national curriculum as well as in principals' and teachers' job descriptions to be able to support their students in meeting the NME's goals (SEP, 2017a; National Research Council, 2013). In this way, the implementation of in-service training prepared teachers for curricular changes and the new expectations these changes introduced.

A focus on 21CC necessitated the transformation of the educator's role from a transmitter of knowledge to an active participant in the learning ecosystem. Teachers were not only expected to help their students develop skills and gain knowledge, but they were also charged with creating and maintaining ties with a larger school community (SEP, 2017a). This new conception of the teachers' role necessitated ample support in the form of professional development in order to prepare teachers for expanded job responsibilities. Integrating the 21CC into principals' responsibilities also reimagined the role of the school leader in the Mexican educational

system. Under the reform, the ideal principal would provide both administrative and instructional leadership for teachers; create collaborative learning environments; and proactively forge connections with families, the surrounding community, businesses and non-profit organizations in order to better prepare students for success in the twenty-first century (INEE, 2018b).

A final strategy that informed the theory of change of the reform was a paradigm shift in the educational community. This placed schools themselves at the center of all learning objectives, which created a sharp contrast to a previous model in which schools were seen as one of many elements in the educational community and were not given full decision-making power (Reyes, 2018). The updated model sought to ensure that the learning objectives outlined in the NME were met. This change was meant to result in improved access to educational opportunities as well as quality instruction (Reyes, 2018). This shift was promoted by an improvement in infrastructure thanks to the "A + Schools" (*Escuela al Cien*) program and the implementation of mechanisms to foster a change in work culture (SEP, 2017c). Teachers had a central role in reclaiming school governance with community members, and professional development was designed with this objective in mind.

Within this strategy, educator professional development consisted of creating networks within and between schools in order to facilitate the exchange of best practice ideas among principals and teachers (Reyes, 2018). It also sought to provide guidance for school development plans. The reform established CTEs and CTZs to facilitate discussion of teacher's practice and assessment of the school community (LGE, 2013). ATPs were installed to facilitate school-to-school collaboration and learning alongside the SATE (LGSPD, 2013). Finally, school, local, state and national CONAPASEs helped create learning communities made up of several schools, rather than schools' learning activities being confined to the immediate surrounding community (LGE, 2013).

Central to the idea of empowering schools with increased autonomy was ensuring that principals, all of whom had been promoted to their post from a teaching position, were fully equipped to exercise effective leadership. Another important figure was that of the supervisor, who was meant to act as another support mechanism for school communities and educators (Schmelkes, 2018). Developing school leaders was, therefore, the main focus of the reform (Reyes, 2018). This would be key to dispelling the perception that principals were under the political control of unions, as had been the case in the previous system when unions determined principal placement (Schmelkes, 2018).

This reimagining of the educational system entailed a variety of intertwined principles. From a governance standpoint, the Ministry of Education would focus on gathering existing best practices and disseminating them to schools nationwide. Although the federal government would oversee the distribution of human and financial capital as well as didactic materials, decisions about where to ultimately allocate these resources were the responsibility of the local education authorities, in accordance with Article 19 of the LGE (LGE, 2013). Further, school communities would benefit from their newly gained agency to determine how to use these resources

(Reyes, 2018). These changes created a system in which professional development was jointly managed by the federal government and the local education authorities.

4.4 First Axis of the RE: Evaluation as a Tool of Professional Development

A key barrier to aligning the country's education to success in a new century was an opaque system of teacher selection and promotion that depended more on union ties than professional merit (Nuño Mayer, 2018). In order to ensure improved student outcomes, the reform defined quality in education as its cornerstone and implemented technical and political accountability mechanisms that had historically not existed to assess educators and contribute to their professional development (Nuño Mayer, 2018).

Professional Teacher Service. International evidence overwhelmingly shows that educational programs, didactic materials and technology may strengthen and amplify the effects of good instruction, but do not replace bad instruction (Majgaard and Mingat, 2012). The main goal of the RE, then, was to ensure, through assessment, that there was a good teacher in every classroom (Granados Roldán, 2018a). This meant deep changes in the LGE, as well as the creation of the LGSPD. The LGE and the LGSPD instituted evaluation procedures to ensure that only professional merit determined hiring decisions (Granados Roldán, 2018a).

One of the fundamental innovations of the reform was the creation of the SPD because it established the criteria, terms and conditions used to assess teachers, ATPs, principals and supervisors in four facets: entry into the profession (*ingreso*), ability to keep a teaching position (*permanencia*), recognition of performance (*reconocimiento*) and career progression (*promoción*) (LGSPD, 2013). That is, teachers could either advance within the teaching profession to be recognized for their performance (horizontal promotion), or move up to leadership roles such as principals, supervisors or ATPs (vertical promotion). The reform mandated that assessment would be the first aspect of the RE to be implemented (LGSPD, 2013). Before this system was introduced, years in the profession and union loyalty were the indicators used to determine promotion. The criterion used by the SPD to assess teachers was based on the evaluation framework developed by INEE (INEE, 2018b).

National Institute of Educational Evaluation. The INEE operated as a constitutional autonomous body that was a state entity, not under government control, and started in 2013. This autonomy is a key difference from the way the institute had been governed since its creation in 2002, which was under the jurisdiction of SEP (LINEE, 2013). INEE's mission was to generate the framework for assessing students, teachers, principals and policies in order to provide sectoral information which had been historically lacking (LINEE, 2013; World Bank, 2018). The INEE had five main functions:

1. Assessment of the educational sector (LINEE, 2013).
2. Coordination of the National System for Educational Evaluation (SNEE), comprising the SEP, the AELs, unions, teachers, parents and the private sector (World Bank, 2018).
3. Creation of guidelines and framework to evaluate teachers, principals, policies and programs (UNESCO, 2017).
4. Publication and analysis of evaluation results.
5. Analysis of policies implemented by the SEP with the authority to ask questions and make recommendations that must be addressed by the SEP.

This institutional framework to measure teacher performance provided a foundation on which the RE's assessment component would be built.

INEE rubric for ideal teacher performance. The reform explicitly defined a high-quality educator using INEE's framework, across two dimensions: curricular and didactic knowledge and lesson and course planning. The curricular and didactic knowledge dimension described the ideal primary school teacher as the following:

> An ideal level-four teacher recognizes the key stages and trajectory of children's development and learning processes, keeping in mind the important influences that family, society and culture have on their students. They recognize the importance of the formative nature of learning goals and demonstrate knowledge of school and curricular content. They know how to measure progression such that it promotes student achievement and results in the attainment of learning goals. Ideal teachers recognize the characteristics of didactic approaches incorporated into a curriculum that is based on pedagogical references. They identify strategies aimed at improving their own professional development (INEE, 2018b, p. 7).

The lesson and course planning dimension described the ideal primary school teacher as the following:

> A level-four or ideal teacher argues about how to link the individual characteristics of students to their sociocultural, school and family contexts, in order to enhance the probability that achievement goals are met while students experience learning environments that motivate them to learn. Such teachers are able to explain evaluations and feedback methods that they use with students to improve their learning. When reflecting on the results of their practice, level-four teachers legitimize their actions based on accepted philosophical, normative and ethical principles that regulate the teaching profession. In addition, they offer arguments in favor of the strategies to enrich their professional development and teaching capacity, and explain clearly how new techniques can be operationalized to strengthen their students' learning expectations (INEE, 2018b, p. 6).

Four levels of teacher evaluation. Teacher evaluation was divided into four categories: initial teacher assessment (*ingreso*), continued teacher assessment (*permanencia*), performance recognition assessment (*reconocimiento*) and career progression assessment to advance within the SPD (*promoción*).

Initial teacher assessment. Before the reform, graduates from teacher training colleges, which were the only institutions that could train teachers, were ensured teaching positions (Reimers, 2018). Teacher training colleges have shifted over time from being equivalent to a secondary education to being equivalent to an undergraduate degree (Reimers, 2018). The reform instituted requirements to restrict entry

into the profession for candidates with the best results on the initial teacher assessment, regardless of previous training (SNTE, 2015). Today, degrees in primary or secondary education as well as pedagogy are all viable entryways into the profession.

The reform reimagined a teachers' role from a mere transmitter of knowledge to a facilitator of learning, an active participant in the academic environment and a key driver in creating harmony among students and the school community (SEP, 2017a). All teachers who passed the entrance evaluation were expected to demonstrate these competencies. The results of a national assessment are reviewed to ensure that only the most prepared teachers are selected and allowed to retain positions (SEP, 2017a). This procedure is meant to eradicate the nepotism, favoritism and low standards that had earlier permeated the profession. Previously, any graduate of a teacher vocational school was guaranteed a position without having to pass an exam. Professional development was vital in helping teachers who had attained positions through the old system in updating their skills and conforming to new standards. It was also key to ensuring teachers who entered the profession through the new system continued to meet the established benchmarks.

Continued teacher assessment. Continued teacher assessment became one of the defining characteristics of the reform. It was introduced to evaluate the competencies of teachers who were already part of the country's teaching force and dictated if they would keep their teaching position (Nuño Mayer, 2018). It is important to note that teachers had three opportunities to pass this exam, which consisted of a questionnaire as well as a test of subject knowledge (INEE 2018). If teachers were unable to pass the exam after a third attempt, they would not be removed from the teaching force altogether, but they would no longer be able to teach in the classroom. This applied only to teachers who had entered the profession through the entrance exam in 2015, not to those that had already secured a position (LGSPD, 2013). This exam arguably generated the most controversy and opposition from specific factions of teachers and the union. Insufficient performance on the initial two attempts on this type of assessment did not lead to immediate removal from the classroom, but instead mandated that teachers who did not pass receive professional development to bolster their performance.

Performance recognition assessment. Evaluation for recognition of performance had three objectives (LGSPD, 2013). First, it would recognize and support individual teachers as well as schools in their pedagogical activities. Second, it would introduce temporary or one-time incentives. Any monetary recognition was awarded with consideration of student outcomes as well as the socioeconomic status of the school in which the teachers were placed. Finally, it would link professional development to incentives so that even the highest achieving teachers were encouraged to improve their skills.

Career progression within the SPD. In addition to advancing horizontally in the teaching profession through performance recognition, educators in Mexico may also pursue leadership roles. There are great disparities worldwide in candidates' knowledge of and preparation for school leadership positions (Chapman & International Institute for Educational Planning, 2005). All principals, ATPs and supervisors in the Mexican educational system possess at least 2 years of classroom experience and have

either completed teacher vocational school or earned a degree in education (LGSPD, 2013). The LGSPD states that principals plan, program, execute and evaluate school functions; organize and support teachers, perform administrative work and facilitate communication between schools, families and mentors (LGSPD, 2013). The reform reimagines the principal's role as not just administrative but aligned with 21CC and better equipped to implement the NME.

The INEE follows a four-level rubric to analyze each assessment, with each level indicating better preparation. This rubric outlines the specific abilities candidates must possess in order to be ranked at each level. The process for ATP and supervisors follows the same logic (SEP, 2017b). This rubric provides guidance for the ideal type of professional development to offer.

Level 1 indicates a lack of knowledge of school workings, underdeveloped management skills and poor curricular knowledge. Level 2 shows better, but still basic, familiarity with management skills and school functions as well as a rudimentary knowledge of curriculum. Level 3 corresponds to a familiarity with school workings and the role of the principal, but inability to create fully-formed collaborative and inclusive school environments. Level 4 describes mastery of the fundamentals of school work and management as well as firm knowledge of curriculum, best classroom practices and mechanisms to improve teaching; this level describes candidates who have the ability to create collaborative and inclusive work environments and identify actions to connect the school to families, the community and other institutions, such as businesses and non-profit organizations (INEE, 2017).

Educator training and professional development. Training and professional development for teachers and principals can be categorized as initial teacher training, in-service teacher training, initial principal training and continuous principal training.

Initial teacher training. The RE mandated that all incoming teachers demonstrate mastery of the skills necessary to teach the new curriculum published as part of the NME (LGSPD, 2013), even though it would not be published until years later. In order to accomplish this lofty goal, the SPD emphasized the need to start implementing the NME curriculum goals in the early stages of both vocational schools and other degree programs (LGSPD, 2013). In previous attempts at reform, introduction to new curricular content was done years after teacher training had taken place, causing misalignment between teacher skills and what teachers were expected to teach (SEP, 2017d). The reform included an innovation in the initial teacher training with the introduction of a degree with a focus on primary education. This created an additional path into the profession and helped break the monopoly the teacher training colleges had held on the selection and promotion of teachers (Mexicanos Primero, 2018).

Very few changes have been implemented in teacher training colleges (*escuelas normales*), making it difficult to satisfy the essential components of content for the Model for Teacher Education (*modelo de educación normal*) (Consejo Asesor, 2014). Fulfilling the model's ambitious goals means diversifying training approaches in teacher preparation programs to incorporate pedagogy that explicitly includes 21CC, an essential component of the NME. Effective professional development would also

close the gap in skills between a teacher rated at Level 2, the minimum passing score and one rated at Level 4, the ideal benchmark.

In-service teacher training. In-service training is provided by a mixed system: a series of online and lecture-based teacher workshops, which reached 1.2 million teachers to prepare them to teach the new curriculum (Granados Roldán, 2018a), peer-to-peer instruction, discussion of the teaching practice and experience, and learning-through-action mechanisms. CTEs were the fundamental spaces for the new policy of in-service teacher training and development. Beginning in 2013, the SEP set aside monthly four-hour sessions that took place eight times a year so that teachers and principals could plan collaboratively, follow-up with students on school projects and activities, and develop research-based pedagogical abilities (Mexicanos Primero, 2018). The focus of the CTE expanded from training within schools to professional development between schools in hopes of creating a network of educators that could share best practices throughout communities (SEP, 2015). Chronologically, this form of training was harder to implement. Although it was promoted at the same time that the LGSPD and LGE were published, the mechanism took longer to become the norm (Reyes, 2018; Schmelkes, 2018).

4.5 Second Axis: The New Educational Model as a Tool for Educators

The NME was a comprehensive approach to changing the educational system in order to address the new challenges of the twenty-first century (SEP, 2017e). Major changes introduced by the NME had a profound impact on teacher professional development because they meant altering or adapting existing resources to be aligned with the goals of this new model. Because educating the whole child is a holistic endeavor requiring systemic alignment, the NME was centered in five key areas: (1) the curriculum, as outlined in the document *Aprendizajes Clave*; (2) schools to the center, which encompasses teachers, the SPD and teacher training colleges; (3) initial and continuous teacher and principal training; (4) equity, which emphasized education as a human right that was not constrained to schooling, but rather viewed as a lifelong learning process; and (5) governance (SEP, 2016).

The NME's curriculum emphasized 11 primary skills that students must develop in the new national education system which fall under three categories: Fields of Academic Knowledge, Areas of Social and Personal Development, and Spheres for Curricular Autonomy (SEP, 2017a). Teacher and principal assessment rubrics and training goals were, in theory, oriented around the ability to teach and internalize these 11 skills. Some of the innovations that were included in this new approach that transformed all the schooling process from pre-school to higher education were: socio-emotional education, a bilingual approach that promoted learning in the child's mother language, a focus on diversity which implied specific goals for individual needs and a promotion of personal and social development.

The NME presented a set of standards and new curricula that represented a novel approach to achieving learning objectives by emphasizing questions, projects and problems which consider the real interests of students and promote personal research, collaborative learning and flipped classroom models (SEP, 2017a). It was a shift in the way the educational system worked because it placed the student at its center (SEP, 2017a) by defining clear learning outcomes as well as ensuring that teachers, teachers in management positions and principals played a new role that envisioned the teacher as a facilitator of key abilities to develop well-rounded students.

The NME established a new pedagogy and stated learning outcomes, new assessments for learners, and a new approach to share this with parents, while also allowing for adaptability to the different socio-economic, cultural, regional and linguistic contexts throughout Mexico (Granados Roldán, 2018b; SEP, 2018).

In 2017, the SEP published the NME curriculum after consultation with national stakeholders. The 2014 "National Consultation on the Educational Model" included 18 regional and three national forums with 28,000 participants in total, including both the general public and experts. This generated 15,000 proposals and four documents totaling 1,943 pages (Nuño Mayer, 2018; Díaz-Barriga, 2018), which received input and feedback from universities, CTEs and CTZs (Nuño Mayer, 2018). The theoretical foundations of the reform are compiled in *Key Learnings for Educating the Whole Child*, which outlines the new curriculum and suggests pedagogical innovations and guidelines for their implementation into the classroom (SEP, 2017a).

4.6 Third Axis: Professional Development, Dialogue and Community Involvement

In order to catalyze a shift in the educational community paradigm, the reform moved away from requiring state-mandated mechanisms for meeting curricular goals and entrusted schools with the responsibility for communal strategizing to meet student learning objectives. This was designed to give more autonomy to schools in order to customize instructional methods and better meet the specific needs of their students. The reform instituted the previously mentioned CTEs, CTZs, in addition to the SATE and CONAPASEs, as programs to promote information-sharing, mutual learning and communal goal-setting among local school stakeholders. The inclusion of these new mechanisms in the school ecosystem allowed for professional development and teaching practices that focused more concretely on learning through collaboration with other educators and schools.

SATE were organized to improve school functioning and promote teacher and principal best practices across regions via support, assessment and monitoring of individualized professional development, knowledge, skills and capacities. A key provision of SATE's goal of facilitating peer-to-peer knowledge exchange was a mentorship program between senior and beginning teachers, an arrangement that had been lacking in previous training (SEP, 2017b).

CONAPASEs sought to create learning communities where all stakeholders in the educational community were represented. Both school leaders and families would come together to foster co-responsibility in the learning and holistic development of students. To do so, they would participate in the design and implementation of a school improvement plan, development of a productive learning atmosphere, and vigilance of proper school management and operations. This equipped educators with opportunities to better develop the skills that would allow them to reach the level 4 indicator.

4.7 Analysis of the Implementation of the RE's Theory of Change

Countries must address political constraints to realize a reform's objectives and break out of low-learning equilibriums (World Bank, 2018). The reform instituted governance mechanisms to recover the state's control of educational systems from teachers' unions and empower communities to participate in the educational processes, such as the establishment of the SPD, new pathways into teaching positions and the four types of assessments that ensure a merit-based system of entry and advancement. By shifting influence and decision-making from unions to the state, the reform's implementation threatened privileges that teachers had historically enjoyed, such as the abililty to inherite or sell teaching positions or awarding principal positions to those who demonstrated loyalty to the union. The challenge, then, was fashioning a new model that did not appear punitive of teachers. This was vital to ensure buy-in from a stakeholder who had both high interest in and influence over the execution of the reform (Bardach, 2012).

The two necessary elements to any reform or intervention are the program theory, which details stated outcomes and the inputs necessary to achieving those outcomes and the processes which are expected to produce those outcomes, and the implementation theory, which indicates the series of actions that must be implemented to accomplish the theory and its expected outputs (Kemmerer, 1994). In the case of the reform, there was a fundamental misalignment between elements of the reform's program theory, modernization of the education system to align to the 21CC, and its implementation theory, for the state to regain control of the sector by assessments. This misalignment, compounded by resistance from some members, specifically the CNTE in the southern states, of the educational community as well as the improper functioning of organisms meant to promote cooperation and interconnectedness, prevented the reform from fully achieving its goal of improving educational quality and equipping all students with 21CC for success in the modern world.

4.8 Analysis of the First Axis: Evaluation as an Indicator for Professional Development

The architects of the reform designed an implementation theory that instituted rigorous teacher and principal evaluation and created a framework for educator selection and promotion. The program theory, then, was to develop a better-trained teaching force and a transparent process for entry into and promotion within the profession. Additionally, the program theory hinged on an effective system of professional development that would support educators at all junctures of their careers. Finally, it was a direct attempt to break the stranglehold that the labor unions enjoyed over the sector for decades. However, several obstacles prevented this vision from coming into full fruition.

Both a desire to take immediate action after the Pact for Mexico had been announced and a restrictive legal framework meant that the evaluation was the first measure implemented by the reform as was mandated in the transitory articles of the LGE (LGE, 2013). While a top-down approach, which was the result of an agreement between the political parties represented in Congress, necessitated decisive action, this did not allow time for a more extended consultation period that could have provided teachers with a clearer understanding of what the reform sought to accomplish. Moreover, these consultations took place after the laws were published and focused on the NME and the curriculum, not on the laws (Consejo Asesor, 2014; CIDE, 2016). Although it is true that many different mechanisms were used to promote dialogue, they came too late. The unnecessarily accelerated pace at which teacher evaluation proceeded reinforced the perception that the RE was punitive, undermining the efforts of the 2014 and 2016 forums conducted by the University of Baja California and the CIDE respectively, which were created to gather the input of all key stakeholders. The positive outcomes of teacher assessment to enhance professional development were never properly explained, which gave more weight to the voice of teachers who opposed the RE (Schmelkes, 2018). That is, the group of educators that did object to the evaluations felt as if they were the targets of mandates and directives rather than collaborators in the authorship of the reform because of the timing of the reform's implementation (Tirado, 2018).

The *permanencia* exam, which determined whether a teacher could keep his or her position, was misaligned and only exacerbated the larger perception that evaluations were a form of punishment, rather than an avenue through which to improve. In fact, since the reform's implementation, the idea of evaluation has been consistently used by its detractors to attack the reform as disrespectful of teachers and more of a labor reform than an educational reform (Granados Roldán, 2018a). Crucially, SEP's framework never secured the backing of the SNTE, and was in fact the target of substantial criticism and the subject of widespread resistance (Reimers, 2018). This lack of acceptance clouded the perception of assessment, not just as a mechanism of the reform, but in the sector as a whole, which had far-reaching consequences, including Lopez-Obrador's decision to dismantle the INEE (Lopez Obrador, 2018).

It should be noted that these mechanisms had different levels of acceptance from the teachers and schools. While the CTEs were widely implemented and quickly became a fundamental space for teachers to collectively discuss their experience in classroom and improvements to their pedagogy, other mechanisms were not well received (Mexicanos Primero, 2018). Although the provision of evaluation did not satisfy all parties involved, it is important to reiterate that there was acceptance from teachers throughout the country, with more than 500,000 teachers to be assessed in the first 2 years of the implementation (Granados Roldán, 2018b). A survey regarding satisfaction of teachers shows the type of in-service training they received as well as how happy they were with it. The results of this survey suggest that there is perhaps enough acceptance of evaluation of educational activities to continue to form part of the educational landscape in Mexico under future administrations.

4.9 Analysis of the Second Axis: The New Educational Model as a Tool for Educators

While the reformed curriculum incorporates cognitive competencies as well as intrapersonal and interpersonal skills, there is still a clear imbalance in favor of the first two of these three categories. This suggests that, while the NME standards have pushed for the development of cognitive competencies, the skill area which most closely correlates to traditional conceptions of school learning, it has also catalyzed the development of competencies found in the intrapersonal skill area. In contrast, leadership abilities, which embody the interpersonal skill area, are not similarly prioritized. However, educators were not explicitly trained to deliver the new pedagogical approaches to transmit these specific new skills to learners.

INEE rubrics. Mexico's reform made an explicit effort to align its curricular goals with the 21CC, but a more concerted effort to develop interpersonal skills would have created more balance between the three categories and would have more explicitly emphasized collaboration and leadership for twenty-first century education. Only candidates achieving the criteria of Level 4 on the INEE rubrics, and to a lesser extent Level 3, display the capacities that fully realize the reform's expectations, and the ability to incorporate the 21CC into the NME. However, since Level 2 is the passing grade, teachers and educational leaders are selected even though they don't possess the attributes of an ideal educator. This highlights the necessity of promoting professional development so that an increasing number of educators can achieve the Level 4 standard.

Recent data show that 52% of 134,009 applicants were hired (Granados Roldán, 2018b). These numbers reflect a large pool from which to select the most-qualified candidates, but existing data does not show what portion of these 52% scored at Level 3 or 4. More evidence would have made clear how many candidates are at the ideal benchmark and how much additional training is needed to improve the preparedness of the application pool. In spite of advances in explicitly incorporating

21CC into the NME, many criticized the reform for lacking the mechanisms to ensure that 21CC were taught (Cordero et al., 2017). Although the NME is predicated on student-centered learning, the same concept is not applied to teacher and principal training.

4.10 Analysis of the Third Axis: Professional Development, Dialogue and Community Involvement

In order to shift the paradigm of the educational community, the reform employed the intertwined strategies of instituting accountability standards, loosening central government control and providing schools with greater decision-making power as well as better prepared leaders. It facilitated exchange of ideas and best practices via continuous professional development and community learning spaces (Reyes, 2018).

Online training and lectures trained large numbers of educators but did not account for peer-to-peer interactions or learning through action, which were a staple of the reform's understanding and teaching of the 21CC.

TALIS found that close to 90% of teachers participated in SATE training workshops. Out of those, 20% of teachers reported that they did not feel prepared to teach the required content (OECD, 2014). Other programs focused more on the strengthening of interpersonal competencies in teacher training, but these were much less utilized.

Teachers reported satisfaction with the program, which created a school learning plan in 170,000 out of the 200,000 CTEs established with a close collaboration between the teachers and principals (Velasco and Treviño, 2018). In sum, CTEs were acknowledged as welcome learning spaces, but few concrete action plans came out of these meetings (Schmelkes, 2018). SATE were meant to reorganize the ATPs, which ended up with a more administrative role than pedagogical, even though that is what the reform had sought to achieve. The short implementation span, which began in 2017, did not allow for them to be correctly understood, leaving them as a task yet to be fulfilled (Bonilla-Rius, 2019).

Additionally, the potential effectiveness of these learning spaces was severely hampered by inconsistent implementation. While some schools were able to put into practice these bodies, others were reluctant to adopt them. To bridge this gap, the SEP tried to make the above-mentioned mechanisms more widely accepted by promoting the use of guidelines and conducting the meetings for them to become actual spaces for co-learning (Reyes, 2018). However, instead of enhancing the dialogue and reflection about teaching practices, government involvement added to bureaucratic tasks for teachers and principals, which made the educational community resent these initiatives more (Schmelkes, 2018).

4.11 Advances and Shortcomings of Professional Development in the Reform

A retrospective look at the reform allows for a more holistic analysis that accounts for how the main actors in the educational system reacted to the core tenets of the reform. The principal achievements and pitfalls of the professionalization of educators in the reform provide lessons for other countries and have broad implications for large-scale educational reform efforts.

4.12 The Curricular Component of the Reform

The reform sought to infuse the NME's curriculum with 21CC that would catalyze learning and equip Mexican students with the breadth of skills necessary to succeed in the current century. However, the lack of established in-service training programs for teachers was a prime obstacle to achieving this goal. The Level 2 passing score on the entrance exam for teachers and principals required that educators possess a moderate level of cognitive and intrapersonal competencies, but did not establish the same requirement for interpersonal skills required in the curriculum. This made it even more difficult for students to acquire these skills. The new in-service teacher training delivered via the CTEs was a prime opportunity for intentionally developing interpersonal skills, but the lack of sufficient presence from and acceptance of ATPs made it difficult for the CTEs to remedy this specific problem.

4.13 Evaluation and Its Impact on Professional Development

An order of implementation that began with laws was logical, but placing evaluation before training only reinforced the narrative of some union factions that the reform was setting up teachers to fail. The evaluation for continuing teachers and the provisions around it were particularly problematic given that the multiple opportunities to pass, and its consequences of removal from the classroom but not the school, may not have been properly understood by all teachers. Better articulating the provisions of this specific evaluation may have helped to soften the blow and make the reform more palatable to teachers.

The task of replacing a decade-long teacher selection and promotion process with a new model was challenging, especially in the face of a powerful teachers union. Nonetheless, implementation of evaluations was a step in the right direction. Assessments were used to control entry into the profession, assign appropriate in-service training, incentivize exemplary teachers with better compensation, remove underperforming educators from the classroom and promote teachers, both within the teaching

track and to positions of leadership. Teachers who reached a "sufficient" grade were not mandated to take part in certain professional development opportunities. This did not go far enough in actively promoting continued improvement and disrupting any remaining complacency in the profession.

In any case, it is important to again emphasize that not all teachers objected to the RE. In fact, many teachers welcomed the performance evaluation, as evidenced by strong and increased participation in these evaluations. Regardless of this, the narrative advanced by the unions was one that characterized the reform as disrespectful toward teachers, a difficult message to counter. In fact, neither the INEE nor the SEP was successful in doing so. Perhaps even more importantly, the architects of the reform were unable to break through the image that they were creating a construct that confined teachers rather than communicating directly with educators in order to forge a path forward. While teachers are arguably the stakeholders most affected by any educational reform, the perception of the reform advanced by its detractors was that teachers were not a central part of its planning.

4.14 Key Lesson: Dedicated Professional Development Spaces with Teacher Input

A critical lesson from the reform is the importance of intentionality in dedicating both time and space to professional development. The CTEs and CONAPASEs were essential spaces for teachers to share best practices, develop pedagogy and engage in the governance of and planning for school communities. Ultimately, bureaucratic obstacles and inconsistent implementation prevented CTEs from achieving their maximum potential. CTEs often became groups for completing administrative responsibilities as opposed to promoting in-service teacher training, especially without a fully staffed and trained ATP. An ATP dedicated to meeting NME and teacher needs as revealed by assessment results may have been more impactful in removing bureaucratic red tape and ensuring consistent implementation across schools. While teachers participated in the consultation process and their input often led to the reimagining of specific aspects of the NME, a more concerted effort to shore up teacher professional development may have helped to avoid some of the problems that arose with the CTEs and could have resulted in a type of in-service training that was immediately aligned with curricular needs and teacher skill gaps, minimized bureaucracy and maximized participation through multiple stakeholder buy-in. Different actors in the education sector, especially teachers, have to be heard in all stages of the process from the design, to the implementation, and evaluation in a continuous manner. Ultimately, this was the cardinal lesson of the reform: it is essential to consult educators and include their input into any substantial reforms.

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