



The development of School Leadership in England and Mexico: lessons and insights

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With the collaboration of Adrian Ingham

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***The Development of School
Leadership in England and Mexico:
Lessons and Insights***

First edition, 2020

D.R. © British Council México

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CDMX, México.

www.britishcouncil.org.mx

ISBN Paperback: 978-0-86355-923-5

ISBN PDF version: 978-0-86355-973-0

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Table of Contents

Preface.....	6
Introduction	10
Section One: The education systems in England and Mexico	12
Section Two: The development of school leadership	26
Section Three: Recent school leadership strategies.....	40
Section Four: Leaders and teachers	60
Section Five: The role of accountability and evaluation in school leadership.....	76
Section Six: Final reflections, lessons and insights	86
Bibliography	93

Preface

This book presents a collaborative research project between Centro de Investigación y Docencia Económicas (CIDE) through the Programa Interdisciplinario sobre Políticas y Prácticas Educativas (PIPE) and the British Council Mexico, institutions which are both committed to fostering quality and equity in Mexican education.

PIPE-CIDE is a programme developed in a highly regarded research centre which seeks to contribute to the improvement of education through the design and implementation of high-quality research, policy and interventions, as well as education policy evaluation. The British Council is the United Kingdom's (UK) international organisation for cultural relations and educational opportunities, aiming to build knowledge and understanding between the people of the UK and other countries. It works with over 100 countries across the world in the fields of arts and culture, English language, education and civil society. Despite their different identities and histories, the two organisations share a common purpose and have resolved to join forces to work on education. This report is a product of that collaboration.

This book follows on from a 2014 report entitled *Recent Developments in the Leadership of Schools in England* (Ingham, 2014). This report highlighted the many changes in the approach to school leadership in England over the previous 15 years. It also showed how the participation of many stakeholders from both the public and private sectors helped to establish an educational policy that supports change and school leadership in a broader way.

In 2015, another report compared the Brazilian context with English school leadership developments (Ingham and Nogueira, 2015). It offered an analysis of the similarities and differences between their educational strategies, allowing the two countries to reflect and learn from each other. The report concluded that the English experience offers evidence for reflection on those aspects of the education system that influence the way headteachers and other leaders conduct school leadership and management.

This book draws on these two reports, adding updated information on recent developments in England up to 2018. It was written with the collaboration of Adrian Ingham who interviewed teachers, headteachers and other school actors in England, some of whose perceptions and comments are included here. It is important to highlight that the analysis focuses on the English education system, context and policies. Although England and the rest of the UK – Scotland, Wales and Northern Ireland – often have much in common in terms of context and / or policies, the results presented here will refer only to developments in the English system specifically. The book also explores developments in school leadership in the Mexican education system since 1993, with the aim being to provide a framework for Mexican authorities to make comparisons on school leadership policy. This research presents an analysis of how the Mexican context compares to English developments and how the Mexican context could progress towards the development of school leadership.

My understanding is that school leadership is more than the educational and inter-personal aspects of the headteacher's activities inside the school. In the sense that it represents all the policies and strategies from the whole education system – including different government bodies and stake holders – that lead to improvements in the quality of learning, governance, and innovation. This publication goes beyond a simple review of leadership practices at English and Mexican schools. Instead it looks at how each education system works, and what policies, institutions and strategies play a role in the development of school leadership.

The aim of the study is not to import a ready-made formula to be applied to Mexico. On the contrary, this project acknowledges that Mexico and England are very different countries, with their own histories and cultural backgrounds. However, concrete evidence of both the progress and struggles of the English education system may well inspire Mexican policymakers and encourage them to develop relevant strategies in the Mexican system. For that reason, this work explores both the accomplishments and areas of opportunity of both education systems to analyse what the Mexican context can learn from the English experience.

Jimena Hernández-Fernández

Research Professor PIPE-CIDE

Introduction

Great changes have happened in England since the publication of *Recent Developments in the Leadership of Schools in England* in 2014 and *The Development of School Leadership in England: Possible Options for Brazil* in 2015. Perhaps the greatest change has been a decision that the United Kingdom should leave the European Union – known as Brexit – which has translated into political changes and a process of adaptation that has inevitably affected the education sector. This book aims to show that even when a country is going through a crucial period of change in both political and economic arenas, there are lessons to be learned from the struggle and positive strategies can be put in place to foster school leadership.

This book will describe how England and Mexico are working towards systems which are supportive of school leadership. In doing so however, it is important to bear in mind the political contexts of the two countries. In England, as a result of the EU Referendum in June 2016 and the decision to leave the EU, David Cameron resigned as prime minister and Theresa May replaced him. In 2019 May resigned, and the Conservative Party again called for leadership elections. Boris Johnson won this internal vote and assumed power as Prime Minister in July of 2019. In Mexico, Enrique Peña Nieto, who comes from the oldest political party in the country, completed his presidential term in 2018. As a result of the elections of 2018, Andres Manuel López Obrador, who formed a new leftist party, assumed power. As we can observe both England and Mexico have recently experienced a change of political leader, so it is likely that crucial changes are yet to come in

political, economic and social arenas. With regards to education, May's, main proposal was to create new grammar schools, while Peña Nieto introduced an educational reform that focused on teachers' entry and performance examinations in the public sector, as well as a new educational model and curriculum.

This work shows that changes in political leadership often come with proposals to shift the course of action in education. For Johnson, in England, it appears to be to inject cash into the education sector, to promote the creation of more academy schools, improve student behaviour, and raise teacher numbers (Chakraborty, 2019). Conversely, for López in Mexico, the course of action is to revoke Peña's educational reform (in particular teacher's examinations) and to bring in a new school model (Hernández-Fernández, 2019). The political changes the two countries are experiencing are particularly interesting as they are yet to be implemented and face public opinion. However, due to the timeline of this book the periods of analysis will be in England up to the end of Theresa May's premiership and in Mexico up to the end of Peña Nieto's presidential term.

The aim of this book is to focus on the identification of areas where, despite the political scenarios, actions are possible to move towards a system that supports school leadership. It is divided into six sections. Section One describes the educational system of the two countries, highlighting the structures in place for school leadership. Section Two describes the historical development of school leadership in the education systems by looking at the main educational policies by different government terms. Section Three presents system improvements that have translated into strategies to foster leadership. Section Four describes the roles of leaders (headteachers and teachers) at school level. Section Five analyses the importance of evaluation and inspection, and Section Six presents some reflections.

1

Section One:
**The education
systems in England
and Mexico**

This section aims to put the English and Mexican education systems into context.

1.1 The education system in England

Education in England is overseen by the government's Department for Education (DfE). It is divided into stages according to age: Early Years Foundation Stage (EYFS) for ages three to five years; primary education for ages five to 11, and secondary education for ages 11 to 16. These three main stages are further subdivided into Key Stage 1 – Infants (KS1 ages 5 to 6), Key Stage 2 – Juniors (KS2 ages 7 to 11), Key Stage 3 (KS3 ages 11 to 14) and Key Stage 4 (KS4 ages 14 to 16). Key Stage 5 is post-16 education (ages 16 to 18) and tertiary education is generally for students aged 18 and over.

The mandatory starting age for school is five (Year 1 of primary school or infant school) and continues to 16 when students typically take exams for the General Certificate of Secondary Education (GCSE) or other Level 1/2 qualifications. Although education is compulsory until the age of 18, schooling is compulsory only until the age of 16. If remaining in school after 16, students continue their secondary studies for a further two years (sixth form), leading most typically to an A-level qualification, although other qualifications and courses exist, including Business and Technology Education Council (BTEC) qualifications and the International Baccalaureate (IB). If they choose to leave school at 16, a student's education can take various forms in terms of academic or vocational paths.

Table 1. Structure of the English education system by level

AGE	YEAR	CURRICULUM STAGE	TYPE OF SCHOOL	EDUCATION LEVEL
3	Nursery	Foundation Stage	Nursery School	Pre-school
4	Reception			
5	Year 1	Key Stage 1	Infant School	Primary School
6	Year 2			
7	Year 3	Key Stage 2	Junior School	
8	Year 4			
9	Year 5			
10	Year 6			
11	Year 7	Key Stage 3	Secondary School	Secondary School with sixth form
12	Year 8			
13	Year 9			
14	Year 10	Key Stage 4 / GCSE		
15	Year 11			
16	Year 12 (Lower Sixth)	Sixth form / A level	Sixth form College	
17	Year 13 (Upper Sixth)			

Source: Author's elaboration based on the International Student UK education system available at: https://www.internationalstudent.com/study_uk/education_system/

The DfE is responsible for child protection, education (compulsory, further and higher education), apprenticeships and wider skills in England. All children in England between the ages of five and 16 are entitled to a free place at a state school, of which there are various types. It should be noted that in addition to state-funded schools, there are many privately-funded independent schools.

The majority of schools in England are funded by the state, with the country being divided into 408 geographical areas known as Local Authorities (LA). Traditionally the government of the day would set education policy and the responsibility for implementing it would fall to the Local Authority which would run the schools. Importantly, this meant the Local Authority had some control over the way the schools were run. Following the 2010 Academies Act this system changed dramatically. The act enabled the creation of a new form of school management where schools were funded directly from the DfE rather than the Local Authority. Academy schools enjoy a greater depth and breadth of control over all their operations. They can set their own term dates, teach a curriculum of their choosing as long as it falls within legal specifications, set their own pay scales and manage their staff and students in the way they find most effective.

As a result, state funded schools can be split broadly into two camps; those funded directly by the DfE, and those funded – and to a certain extent controlled – by a Local Authority. Within the former group lie Academies and Free Schools. Academies are run by an Academy Trust and make up the majority of this sector. Free schools are set up and run by stakeholder groups such as charities or faith groups and often have a particular direction or ethos in terms of their curriculum, outlook and management. They enjoy the same freedoms as Academies in terms of budgetary responsibility and decision making, in fact they are, technically, Academies.

In terms of those schools still funded and run by a Local Authority, these are generally called Comprehensive Schools or Community Schools. They follow the national curriculum and have their budgets set by the Local Authority. It should be made clear at this point that state-funded schools are divided by this difference in funding structure rather than any other denominator, so the types of school discussed below will typically be found in both groups.

Faith schools will, as the name suggests, have a focus on a particular religion. In England the majority of these will be run in conjunction with the Church of England or the Catholic Church. They are allowed different admissions and staffing policies from non-faith schools to allow for religious freedoms and expression.

Grammar schools are unusual in the English system in that they are selective in their intake. Prospective students take an exam at 11 called the 11-Plus with a straightforward pass or fail criteria. Those who pass are eligible to apply for a place at a Grammar School, although there is no guarantee of being accepted. They were largely phased out in the 1960s and 1970s when policy changed to dictate that every child should be able to be accepted into any school, regardless of their ability in exams. Grammar schools now only remain in a handful of local authorities but are hugely popular with parents.

Special Schools cater for students with Special Educational Needs and Disabilities (SEND). Again, they can be either Academies or run by the Local Authority. The needs of these students vary and will include physical and sensory, learning and emotional needs. Although the culture of English schools is very much inclusive in nature, with a focus on both access and engagement for SEND students in mainstream schools, there will always be children for whom attendance at a mainstream school with an exam-oriented curriculum is simply not realistic.

Sitting outside the state-funded system are Independent Schools, also called Private Schools and, confusingly, Public Schools. These schools receive no central government funding but are financed by student fees. They do not have to follow the national curriculum and maintain complete autonomy over their operations. These schools educate approximately 7% of children in the UK.

England has an education system where many leadership and management decisions are taken at a school level (Education Development Trust, 2014). This is a consequence of the introduction of Local Management of Schools (LMS) introduced by the Education Reform Act in 1988. The LMS devolved autonomy on resource allocation and priorities from local authorities to school governors. In general, the structure of leadership roles within schools is headteacher, senior leaders and middle leaders as defined by the School Workforce Census Collection (DfE, 2018). Table 2 shows the corresponding posts.

Table 2. Leadership roles in English schools

LEADERSHIP	POST
Middle leader	Classroom teacher
	Advisory teacher
	Leading practitioner
Senior leader	Assistant headteacher
	Deputy headteacher
Headteacher	Headteacher
	Executive headteacher

Source: (DfE, 2018) School leadership in England 2010 to 2016: characteristics and trends

Headteachers report six main areas of responsibility:¹ accountability (time spent fulfilling the legal and other responsibilities of headteachers); strategy (setting the strategic ethos of the school and improvement planning); managing teaching and learning; staffing issues (including recruitment and staff professional development); networking (with other schools and other appropriate organisations); and operations (the day-to-day management of the school).

In England, headteachers are held accountable for school performance through a highly developed national accountability framework (Education Development Trust, 2014). All schools are subject to assessment and inspection by the Office for Standards in Education, Children's Services and Skills (Ofsted). Ofsted is a non-ministerial department of the United Kingdom (UK) government, reporting to Parliament. It is responsible for inspecting a range of educational institutions and other children-related services such as childcare, adoption and fostering agencies, early years provision and children's social care services.

With regards to education, Ofsted inspects or regulates childminding, child day care, children's centres, state schools, independent schools, teacher training providers, and colleges, as well as learning and skills providers in England. It also monitors the work of the Independent Schools Inspectorate. Ofsted employs inspectors who are experts in their relevant fields, so the vast majority of school inspectors will have teaching experience; in that way inspections of schools are performed by education professionals who have classroom knowledge and experience.

1. A study by PricewaterhouseCoopers in 2007 asked headteachers' opinions about what their main responsibilities are within their schools. The study results are quoted in Day and Sammons (2016).

1.2 The education system in Mexico

In Mexico, education is overseen by the Secretaría de Educación Pública (SEP). The mandatory start school age is three (first year of pre-school) and compulsory education lasts until upper secondary education (15-18 years old).² The education system is structured into five levels: first, three years of pre-school education (ages three to five); second, six years of primary at a compulsory starting age of six years-old (Grade 1 to Grade 6); third, three years of lower secondary for adolescents between the ages of 12 to 14 (Grade 7 to Grade 9); fourth, three years of upper secondary for young people ideally between the ages of 15 to 18 (Grade 10 to Grade 12); and finally, higher education (HE). Therefore, a normal school trajectory from basic to higher education without interruptions would last between 16 to 20 years, depending on the field of study.

Table 3. Structure of the Mexican education system by level

AGE	YEAR	EDUCATION LEVEL	EDUCATION STRUCTURE	
3	Grade 1	Pre-school (Initial education)	Basic education	Compulsory education
4	Grade 2			
5	Grade 3			
6	Primary Grade 1	Primary		

2. In 2019, as part of president López Obrador's reforms to the education article of the Constitution, the State became responsible for providing free education until higher education level.

AGE	YEAR	EDUCATION LEVEL	EDUCATION STRUCTURE	
7	Primary Grade 2	Primary	Basic education	Compulsory education
8	Primary Grade 3			
9	Primary Grade 4			
10	Primary Grade 5			
11	Primary Grade 6			
12	Secondary Grade 1			
13	Secondary Grade 2			
14	Secondary Grade 3			
15	Upper Secondary 1	Upper secondary		
16	Upper Secondary 2			
17	Upper Secondary 3			
18	Fresher year	Higher education		

Source: Author's elaboration based on MEXTERIOR Sistema Educativo Mexicano available at: <https://www.mexterior.sep.gob.mx/sisedMEX.html>

In the Mexican system, there is a slight difference between what is considered basic and compulsory education. In the National Constitution basic education is defined as the education that the State is committed to provide universally and free of charge; while compulsory education is the education that is promoted by the State although it is not pledged to be provided free of charge. Basic education includes the trajectory from pre-school to lower secondary school. In 2012, upper secondary education became compulsory. In that sense, basic education is pre-school, primary and lower secondary while compulsory is all the education cycle from pre-school to upper secondary education.

Schools that are funded by the government at federal or state level form the public school system. Here, pre-school education is offered in three modalities of schools: general, indigenous and communitarian. General schools have a general curriculum and classes are taught in Spanish. Indigenous pre-school education is based on the recognition of children belonging to an indigenous culture and / or their migratory experience. The communitarian modality offers education services in isolated and sparsely populated areas where there is no school, and is offered by tutors. Similar to pre-school, primary education is provided in the same three modalities: general, indigenous and communitarian. In any of the modalities, primary education is essential in order to pursue lower secondary education and must be undertaken before it.

Lower secondary education is provided through the following modalities: general, for workers, telesecundaria, technical, and for adults. Lower secondary usually targets the 12 to 16 age range, but is also available post-16 for workers or in the modality for adults. This level is propaedeutic, making it compulsory for students who want to move on to upper secondary or professional education.

The curriculum to be followed at basic education (pre-school, primary and lower secondary schools) is designed at the federal level of the

government by the SEP. All public schools are required to follow the curriculum and free textbooks are provided to students to support the process. Some schools may add additional subjects depending on the level of extra resources from parents' voluntary contributions.

Upper secondary education follows on from lower secondary school and is provided through three subsystems: the general baccalaureate which also includes modalities of open high school and distance education; the technological baccalaureate which offers a technical certificate and at the same time prepares students for higher education; and technical professional education, which trains qualified professionals in various specialties. Each of the upper secondary subsystems is structured differently in terms of objectives, school organisation, curriculum and the general preparation of students.

In Mexico there is also a private school system which students pay fees to access. Private schools at basic level must follow the national curriculum although they have the flexibility to use different pedagogical approaches and choose additional subjects of study. According to the Census of Schools, Teachers and Students of Basic and Special Education, 2014, by the Instituto Nacional de Estadística y Geografía (INEGI), 86.4% of schools are public while 13.6% are private. In Mexico there is a wide variety of private schools and the methods and quality of education can vary greatly. As well as catering for the middle and upper classes, private schools can be an option for students who did not get a place in the public system, particularly at upper secondary level.

At upper secondary level, private schools can choose to register with the SEP or with the Universidad Nacional Autónoma de México (UNAM). As a result, the private upper secondary curriculum to be followed will depend on the institution of registration. Certificates of both types of school registration are accepted to apply to any HE institution, although revalidation of classes may be needed.

In public schools the highest authority is the headteacher, who is responsible for the pedagogic operation, organisation, and management of the school. Pre-schools and primary schools have a Technical School Council (CTE, *Consejo Técnico Escolar*) as an advisory body for school management, chaired by the headteacher. This council meets at least once a month to analyse school issues and make recommendations regarding the plans and programmes of study. It can also make observations on teaching methods and educational services, teacher training, the acquisition of materials, the development and use of teaching aids, and other educational matters (Parés, 2016).

In lower secondary schools, as in the primary schools, there is a Technical School Council which assists the headteacher in the planning, development and evaluation of educational activities and in the resolution of issues. This council consists of the headteacher, who presides over it, deputy headteacher, and the entire teaching staff including teachers of special education, physical education and other specialties. In the case of indigenous, unitary and multi-grade schools, the CTE usually consists of teachers from various schools and is chaired by the supervisor. The CTE intends to provide a space where school staff can meet regularly to perform school planning and to discuss issues.

The administrative and pedagogical supervision of primary and lower secondary schools is co-ordinated by the educational agencies of the federal and state governments. In school zones, supervisors and inspectors perform technical-pedagogical and administrative monitoring functions, and serve as liaison between educational authorities and schools. The supervisors must know the educational needs of the community, organise and promote the work of the school in its different aspects and link the guidelines of the national educational policy with the concrete achievements of each school.

Table 4. Leadership roles in Mexican schools

LEADERSHIP	POST
Middle leader	Classroom teacher
	Prefect
Headteacher	Headteacher with teaching duties
	Headteacher
Senior leader	Supervisor

Source: Author's elaboration based on Parés (2015) Educational leadership in Mexico.

In Mexico, actions towards increasing accountability and evaluation are relatively recent, with The National Institute for Educational Assessment and Evaluation (Instituto Nacional para la Evaluación de la Educación, INEE) being created in 2002. Until 2012 it was a decentralised organ of the SEP, after which it became a decentralised, autonomous federal agency and so a separate legal entity, with administrative and budgetary independence. Its main assignment is to evaluate the quality, performance and results of the national education system from pre-school through to upper secondary level. To do so, it designs the necessary instruments for measuring processes and results, and issues evaluation guidelines for federal and local education authorities to follow. However, with the 2019 education reform, the INEE's legal status has been revoked and its attributions deleted from the National Constitution. As a result, the institution is going to disappear in the near future. It is relevant to mention that there is a proposal to create a new centre to replace the INEE, which will be in charge of the appraisal

of teachers, as well as the continuous improvement of the education system. The new centre has already appointed a council, but at the time of writing there was still no clarity as to what its attributions will be. As a result, the transition from the INEE to the new centre will not be explored further.

2

Section Two:
**The development of
school leadership**

This section aims to tell a brief story of the development of school leadership in the English and Mexican education systems. For clarity, this work refers to government periods and their educational developments with regards to education as a whole, and to school leadership in particular.

To tell the English story, the prime ministerial tenures are used as the unit of analysis. In England the government is decided by a general election which is held after the dissolution of Parliament – usually every five years – to elect a new House of Commons.³ At the general elections each constituency votes for a member of parliament (MP) and the party with an overall parliamentary majority forms the government, with the leader of this party becoming prime minister. The periods of analysis therefore vary according to how long each Prime Minister was in power.

For the Mexican story, the presidential periods are used as unit of analysis. In Mexico the president is the head of state and government. The National Constitution states that the presidential term is set for six years with no renewal. The president is elected by direct, popular, universal suffrage. Whoever wins a simple plurality of the national vote is elected. As a result, the period of analysis for the Mexican case is every six years.

3. Unless there is a successful vote of no confidence in the government or a two-thirds vote for a snap election.

2.1 The development of school leadership in England: the brief story

The Blair government (1997-2007) is a good place to start when telling the story of the development of school leadership in England. Tony Blair's foreword to the 1997 Labour manifesto, *New Labour Because Britain Deserves Better*, declared that: 'Education will be our number one priority, and we will increase the share of national income spent on education as we decrease it on the bills of economic and social failure.' Moreover, during his campaign, Blair stated that his government's priorities would be 'education, education, education' (Gillard, 2018a). As a result, at the time, the Blair era was seen by many teachers as a period of hope; where it was expected for tests and league tables to disappear, the selection for secondary education to be abolished, and grant-maintained schools to be brought under local authority control. However, no such promises had been made during the campaign (Gillard, 2018a).

The Blair government instead had as its main objective the improvement of under-achieving schools, and is remembered for its efforts to improve educational outcomes. The strategy was to convert schools into academies and remove them from the influence of local authorities. Successful schools were invited to become academies and embrace new freedoms in running their own affairs, particularly in terms of devolvement from local authorities. This strategy was supported in the school system and many schools benefited from the freedom to identify and work towards the improvement of their own opportunity areas as a community.

Another part of the strategy was to fortify the role of Ofsted in continuing to drive improvements in schools. However, contrary to what teachers hoped for, the push towards improvement continued to be by the threat of public exposure (Gillard, 2018a). As a result,

the administration continued to make the common mistake of blaming teachers for underachievement instead of observing the conditions in which their pupils lived or the inadequate or under-funded schools in which they taught.

The following prime minister was Gordon Brown (2007-2010). One of his first actions in the education sector was to split the education department into the Department for Children, Schools and Families (DCSF) and the Department of Innovation, Universities and Skills (DIUS). The intention was to focus the policy actions for each department, allowing the development of a more coherent structure and management system. As a result, the government would have on the one hand a strategy to focus on children's key issues such as poverty, schooling and care, and, on the other hand, a structure to oversee higher education, science and the link between the labour market and HE. The DCSF was meant to ensure strategies for schools to work more extensively and effectively with parents, other providers and wider children's services, as well as establish an accountability framework and school improvement strategies for all schools (Gillard, 2018b). In a way, the DCSF was the driver of school leadership. It:

- Enabled extended schools to give more support to disadvantaged children and young people.
- Maintained the testing regime, although the government acknowledged that schools could make well-informed judgments about when pupils should be tested. The government did not approve of streaming, but strongly supported setting for individual subjects, 'with judgments made by heads and teachers, according to the needs of their school'. (Gillard, 2018b).
- Highlighted that academies were improving faster than other schools, thus setting new academies at the centre of school strategies. Until then, to set up an academy, a process of sponsorship had to be in place to check bank funds. The new

strategy was to change the process in order to verify if the sponsor was an organisation which could demonstrate leadership, innovation, and commitment to act in the public interest.

The overall idea of having the DCSF and the DIUS seemed sensible, but an overlap in the target population started to create implementation issues. For example, the DCSF was to set education policy for students up to the age of 19, but DIUS led on reforms for the 14-19 age group. As a result, DIUS lasted for only two years and its responsibilities subsumed into a new Department of Business, Innovation and Skills.

David Cameron (2010-2016) caught public attention with regards to education during his time in opposition when he launched the conservative education policy paper *Raising the bar, closing the gap* in 2007. The document emphasised the importance of improving school results and students' achievement. One of the most visible changes of Cameron's government was that his predecessor's DCSF was renamed the Department for Education (DfE). Also, in 2010, the new government published the coalition's Programme for Government which stated the need to reform the school system to tackle educational inequality while giving greater power to parents and pupils to choose their school. The document also highlighted the following proposals (Gillard, 2018c):

- To fund a significant premium for disadvantaged pupils.
- To improve the quality of the teaching profession and to reform the national pay and conditions rules.
- To help schools tackle bullying.
- To create more flexibility in the exams system and reform league tables.
- To give heads and teachers the powers they need to ensure discipline in the classroom and promote good behaviour.

- To keep external assessment but review how Key Stage 2 tests operate.
- To ensure that all new academies follow an inclusive admissions policy.

In accordance with education policy, Cameron's strategy remained to open more academies. Moreover, letters were sent to all secondary schools inviting them to become academies. This action was criticised by the National Union of Teachers (NUT), where the invitation was perceived as an assault on local communities with the establishment of a new type of school. Also, the government's opposition argued that funding would be diverted to 'the strongest schools to convert to academy status, as well as to fund hundreds of new free-market schools, and that the role for the local authority in planning places, allocating capital or guaranteeing fairness or social cohesion is entirely removed. The weakest schools, children from the poorest communities, and children with a special need and those with a disability, will be left to pick up the pieces with old buildings, fewer teachers and larger class sizes' (Gillard, 2018c). Despite protests, the bill was passed and so the criticised academies continued to increase in number across the country. Additionally, there was the promise to open new free schools. However, fewer schools than expected were able to open as the DfE revisions appeared not to favour them as a result of short funding.

Cameron's government can also be remembered for the appeal for entrepreneurial spirit among school leaders, which was well received by many, but a shortage of funding affected the strategy of fostering school leadership. Despite this, an area in which leadership was supported was in the 'slimming' of the National Curriculum. The new curriculum allowed academies and free schools the freedom to set aside parts of the national curriculum with the proviso they teach a 'broad and balanced' curriculum. Moreover, during this period headteachers

were encouraged to take charge and make a stand against bullying while teachers were given the right to search pupils for harmful items. This allowed headteachers and teachers to make decisions and be confident that their authority would not be undermined.

Nevertheless, Cameron's government suffered a setback in the fostering of school leadership with the decision to dissolve the National College for Teaching and Leadership (NCTL, originally the National College for School Leadership, NCSL). The institution was loved and valued by teachers and leaders and had supported the profession since the 1990s.⁴

Theresa May (2016-2019) assumed power after Cameron's resignation. This period, in regard to education, can be summarised by the phrase: 'the battle for grammar schools returns' (Millar, 2016). Very soon after her appointment, May brought forward a proposal in a white paper⁵ called *Education Excellence Everywhere*. The document stated that 'by the end of 2020, all schools will be academies or in the process of becoming academies. By the end of 2022, local authorities will no longer maintain schools' (DfE, 2016a). May also gave a meritocracy speech, announcing an end to the ban on new grammar schools. Grammar schools take the brightest children, following academic selection at the age of 11. This was a model that died out in most parts of the country in the 1970s, being replaced by non-selective comprehensive schools, but selection survived in a number of local authorities.

The proposal was followed by a campaign for a new perspective on grammar schools, stating that the new grammar schools would

4. When the NCTL was repurposed in 2018, the regulation of the teaching profession, including misconduct hearings, passed to an executive agency of the DfE, the Teaching Regulation Agency.

5. White papers are policy documents produced by the Government which set out their proposals for future legislation. For further information, see: <http://www.parliament.uk/site-information/glossary/white-paper/>

‘support young people from every background, not the privileged few’ (BBC News, 2016). May justified her policy, saying ‘when it comes to opportunity, we won’t entrench the advantages of the fortunate few, we will do everything we can to help anybody, whatever your background, to go as far as your talents will take you.’ (BBC News, 2016). Nevertheless, May’s proposal shocked public opinion as grammar schools have historically been seen as elitist and as gatekeepers for social mobility. Moreover, the teachers’ unions, local authorities and some university authorities were vocal about the likelihood of the new grammar school policy preventing working class students from accessing good quality education and going to university.⁶

During May’s government the DfE published *Schools that work for everyone*, a consultation document which focused on the creation or expansion of schools. It proposed that:

- Independent schools should sponsor academies or free schools, and should offer free places to ‘those who are insufficiently wealthy to pay fees’ (DfE 2016b:14).
- Universities should be required to sponsor schools as a condition of charging higher fees (DfE 2016b:20).
- Existing grammar schools should be encouraged to expand, new grammar schools should be permitted, and existing comprehensive schools should be allowed to become selective (DfE 2016b:24).
- The 50% cap on faith-based admissions should be abolished (DfE 2016b:33).

4. Among contributor comments about grammar schools: ‘Everything about offering all children a good education and every child having the right to go to at least a good school seems like a lie since the agenda has stepped back into the realms of being chosen according to ability.’ ‘Grammars are not the solution for the majority. It is a nostalgic policy, based on anecdotal recall of politicians’ pasts. It doesn’t stand up to the test of evidence and is a distraction from the main debate. It is a false debate, not relevant to the world we live in.’ ‘It is a distraction we don’t need. No evidence it improves most pupils.’ ‘It will divert money that should be in mainstream [schools].’

Throughout this period the local authorities' power to influence schools, and the funding they received, reduced significantly. The move of more schools to become academies meant a further centralising of education in the country. In theory, the thousands of newly created academies depend on the London-based Department for Education, a situation which some regard as a benign development, while others see it as an underhand means for central government to control, remotely, what schools are doing. As a result, opinions differ considerably on the importance, effectiveness and motives of the DfE.

2.2 The development of school leadership in Mexico: the brief story

A good place to begin with the story of school leadership in Mexico is in the 1980s with the reforms made for political, social and educational restructuring. These reforms have been categorised by Del Castillo in 2012 (quoted in Gómez-Collado, 2017) as the first, second and third generation of government reform. The first generation of reforms allude to the decentralisation and financing of education, the second generation refers to the education system quality assessment, while the third generation looks at transformations to the school space (Gómez-Collado, 2017).

During Carlos Salinas de Gortari's presidential term (1988-1994), the third article of the Constitution was reformed, and the General Law of Education instituted. In 1992, the National Agreement for the Modernization of Basic Education was approved (ANMEB); which stated that public spending would give education the highest priority. This agreement enabled the first and second generation reforms and linked the federal government to the states and the National Teachers

Union (SNTE). The agreement highlighted the importance of raising the quality of education and set out numerous aims, such as to allocate resources to the education sector, expand public spending, expand coverage of educational services, raise the quality of life of students, provide greater access opportunities for social mobility, favour the economic promotion of individuals, and generate knowledge and skills to raise productivity (SEP, 2015 quoted in Gomez-Collado 2017).

From 1994 to 2000, during Ernesto Zedillo's presidential term, educational policies gave continuity to the ANMEB and continued to focus on basic education at primary and lower secondary school levels, resulting in increased coverage in those areas. An outstanding policy of this period was the curricular reform for primary schools, promoting free textbooks to support quality, as well as the publication of books in indigenous languages. Moreover, several policies were implemented to strengthen literacy, maths and science, as well as school management.

Another accomplishment of the period was Mexico's participation in the PISA evaluations. Although at the time the results of the tests were kept confidential, it was the first step towards obtaining independent information about the efficacy of the education system which could be used for the design of public policies to improve the level of achievement. (Gómez-Collado, 2017).

For the six-year presidential term of Vicente Fox (2001-2006) a document called *Bases for the education sector program 2001-2006* was released, which covered three key points:

1. long-term view of goals (up to 2025), as well as evaluation mechanisms, monitoring and accountability.
2. Reform of the management of the educational system which contained common points at all levels, types and modalities of education related to the structural changes.

3. Sector subprograms for education at separate levels: basic, upper secondary, HE, and for life and work.

This 2001-2006 programme tried to maintain a balance between continuity and change by recognising not only the achievements of previous policies, but also the complexity of making drastic changes in the education system (Moreno, 2004).

The 2001-2006 programme also proposed the creation of a set of specialised bodies, including a National Council of Educational Authorities in which the highest authorities of the 32 state systems, under the presidency of the Minister of Public Education, made the most important educational decisions in close co-ordination, and a Council of Specialists where authorities received advice for decision making. There were also several organs of participation, through which, for example, parents could organise and contribute to decision making and promote accountability.

Also, during the six-year tenure of Vicente Fox, reforms to the curricula and programmes of the Teacher Training School (Escuela Normal) were carried out (Moreno, 2004):

- In 2002 the third article of the Constitution was amended to establish the compulsory nature of pre-school education. In addition, the 31st article was modified to establish that it is the responsibility of Mexican citizens to ensure their under 15-year-olds are in school to receive basic education.
- In 2006 the Comprehensive Reform of Secondary Education (RIES) was established, which stipulated radical changes in curriculum content and a plan to 'balance' the curriculum.

Another educational policy driven by Fox's government was to increase transparency and accountability with the creation of a body to evaluate

quality, performance and results in pre-school, primary, secondary and upper secondary education. Called the National Institute for the Evaluation of Education (INEE), it had the aim of guaranteeing the quality of educational services by making information about their situation available for the first time.

The Education Sector Programme 2007-2012, during Felipe Calderon's presidential term, aimed to increase the quality of education, reduce social inequalities, promote competition and the use of technologies, as well as training individuals and inculcating a greater sense of social responsibility and values.

During Calderon's period a 'pact' was negotiated with the teaching profession; the 'Alliance for the Quality of Education' was signed in May 2008 between the Federal Government and the SNTE. In the document, the 'Alliance' intended to 'promote a transformation for educational quality', and called on 'other indispensable actors for this transformation: state and municipal governments, legislators, state educational authorities, parents, students of all levels, civil society, businessmen and academia, to advance in the construction of a State Policy.' (Vázquez Olivera, 2015). The pact intended to ensure that teachers 'are properly selected, properly trained and receive the incentives they deserve based on the educational achievement of children and youth'; and to guarantee 'quality education that promotes the construction of citizenship, that boosts productivity and promotes competition so that people can develop their full potential'. In addition it aimed to strengthen the centrality of evaluation 'to raise the quality of education, favour the transparency and accountability, and serve as a basis for the proper design of educational policies' (Vázquez Olivera, 2015).

It is important to note that none of the reforms introduced to the basic education subsystem since the 1990s had caused the disagreement

aroused by the Alliance for the Quality of Education (Vázquez Olivera, 2015). Since the signing of the document, several waves of protests and teacher mobilisations occurred across the country, which, despite their magnitude, failed to stop the mechanisms of regulation and control that the Alliance for the Quality of Education brought.

The government of President Enrique Peña (2012-2018) released the Education Sector Program 2013-2018 which had the aim of raising the quality of education with a gender and equality focus. The term 'quality education' is used in the Education Sector Program and included as one of its five national goals. In addition, the document emphasises that education is a human right that every Mexican should have access to.

More significantly, Peña's government amended the third article of the Constitution and released another educational reform. This reform modified the General Education Law and two general laws were created, namely the Professional Teaching Service Law and the National Institute for the Evaluation of Education Law.

The Professional Teaching Service Law established the terms for admission, promotion and permanence of teachers. The law indicates that every four years all teaching professionals, without exception, must sit and pass the various sections of an evaluation. If they do not sit the exam, or do not pass it after a second chance, they will be dismissed from their duties. This area of the reform raised huge controversy among the general public and teachers. For that reason, López Obrador made the abrogation of the reform one of his main campaign proposals.

An important change of the period of Peña Nieto in terms of school leadership is the release of the 'New Education Model'. The model and its curricular approach recognised the importance of developing new skills in students. With this, cognitive and social skills such as critical

thinking and problem solving, communication and collaboration, digital literacy and citizenship were recognised as foundations for learning.

Despite its innovative proposals, a key issue with the 2013 educational reform in curricular terms was that the implementation of the plans and programmes was not tested by piloting until the last year of Peña's government. Having left its implementation for after the presidential elections was a great flaw since given the political context of government change, and the position of the incoming government regarding the reform, this implementation was unfulfilled and revoked at the start of López Obrador's term in 2019.

3

Section Three:
**Recent school
leadership strategies**

This section presents a general overview of government strategies to foster school leadership within their education systems. Four categories are presented for each country:

- Education reform and general policies
 - Inspection strategies
 - Teacher training strategies
 - Actual school leadership strategies
-

3.1 Recent school leadership strategies in England

3.1.1 Educational reform and general policies in England

With regards to educational reform and general policies, the English school system provides an example of changes that have been implemented with the intention of promoting leadership. England went through educational reforms since the 1980s which helped to transform the role of headteachers. Until then, the power of authorisation, finance and implementation of education policies lay with the local authorities. The main impetus of the reforms in the 1980s was an emerging awareness of the risk of national under-performance. With local authorities in charge of education, the role of central government was rather limited, there was no national curriculum and little public accountability for school performance. At the same time, both the freedom and the corresponding accountability of headteachers and school governors was limited. The numerous measures subsequently taken by successive British governments greatly reduced the role of local authorities in education. As a result, responsibility for education is now shared across national, local authority and school levels. This means there is now greater national-level

ownership and enforcement of standards, as well as greater school-level autonomy and accountability for delivering what is required. This has meant much greater freedom for headteachers to manage their own school budgets, as well as other aspects of their school management and pedagogy.

The former Secretary of State for Education,⁷ Michael Gove, whose time as minister ran from 2010 to 2014, highlighted the need for fundamental reform. His challenge, however, was to gain the approval of practitioners and public opinion. Gove appealed to the entrepreneurial spirit among school leaders with proposals that were well received by many, but at the same time the closure of the National College for Teaching and Leadership (NCTL, originally the National College for School Leadership, NCSL) was less popular. Gove's actions were complicated by a period of government-imposed financial cutbacks, and closing the costly NCTL was seen as a viable option for a minister charged with having to save money. Nevertheless, the strategy to reduce the power of local authorities and devolve it to schools continued to gain momentum.⁸

The election of 2015 had education as a relatively minor policy theme when compared with elections in the previous twenty years.⁹ However, it was not to last. Soon, Theresa May declared that her vision for the future of education was to introduce and develop new grammar schools across the country.

In the period between 2015 and 2018 there have been repeated false starts in terms of government policy development and implementation.

7. 'Secretary of State' is a minister in the government cabinet.

8. 'It is trying to break up a 'one-size fits all' to a personalised system for each location.' Interview, educational leadership expert.

9. Interview, headteacher.

Changes to testing and assessment regulations have been started, then stopped. A plan to test four-year-olds on entry to full-time education was piloted for a year and then abandoned. Radical changes were introduced to the curriculum and to the testing of older pupils. Expectations were ratcheted up dramatically so that what was good one year was suddenly unacceptable the next. The 2015 white paper sent shudders through the system with its declaration that all schools would be academies by 2022, only for the policy to be dropped very quickly.¹⁰

3.1.2 Inspection strategies in England

Schools in England have been externally inspected since 1839, and inspection reports have been published since 1983. The role of inspections in holding schools accountable and levering up standards was recognised as part of the 1980s reforms, and in 1992 the scope, frequency and status of inspections were greatly enhanced with the inception of Ofsted.

Ofsted is a non-ministerial department of state closely aligned with, but independent from, the DfE. It is in charge of inspecting maintained schools and academies, some independent schools, and many other educational institutions and programmes outside of direct education, such as childcare, adoption and fostering agencies, and initial teacher training. It is also in charge of regulating a range of social care services for early years, children and vulnerable young people and ensuring these are suitable and fit for purpose. Ofsted publishes reports of its findings which can be used to improve the overall quality of education and training by informing policymakers about the effectiveness of education services.

10. This was announced to parliament not by the education minister, but by the Chancellor of the Exchequer in a budget speech. Nothing could have spurred more schools to move to academy status in a hurry than this forewarning. 'It fuelled the collaborative learning approach. We saw this coming and have made a choice because no one is challenging or supporting us. We have good governors, but that is not enough. The local authority is losing its last main support - EYFS – so all we have is statutory duties, inclusion, admissions and some community things.' Interview, headteacher.

Schools in England are graded by Ofsted on a four-point scale: Outstanding, Good, Requires Improvement and Inadequate, and reports are published in the public domain. Inspections happen about every three years, but the frequency varies according to performance, for example, 'Outstanding' schools have fewer visits from Ofsted. Nationally, at the time of writing, 21% of schools are rated Outstanding, 68% Good, 9% as Requires Improvement and 2% are Inadequate. Schools that are judged 'Requires Improvement' or 'Inadequate' are monitored and supported in their efforts to improve.

One unusual facet of the English system in terms of inspection is that it allows schools to evaluate themselves and offers external validation of the schools' evaluations, although in practice, the ever-changing Framework for Inspection, revised annually by Ofsted, has a dominant influence on how and what schools choose to evaluate themselves on.¹¹ Self-confident schools look to the framework, but focus mainly on their own priorities for school improvement and the most effective means of evaluating 'holistically, by concentrating on their values rather than tight achievement targets and data'.¹² For many headteachers the belief, is that 'when embedded, self-evaluation is the life-blood of the school; it tells the story of a school's journey, how well they know themselves and what they need to do in the future'.¹³

Confident schools do not bow automatically to Ofsted. They have their own beliefs and feel confident in asserting them. This is all very well when things are going well, but when the tide of success is against a school it is very hard for the leaders to do anything other than to take Ofsted's requirements very seriously indeed. Autonomy has to be

11. 'Sensible people look first for what Ofsted will look for. Creating a narrative round the data.' Interview, educational leadership expert.

12. Interview, headteacher.

13. Interview, headteacher.

earned, and schools which are rated as in need of improvement ignore the warning signs at their peril.

In some underperforming schools, pressure on teachers comes from the school's own leaders who want to see rapid improvements. But this takes time, and sometimes teachers will move to another school to escape the situation. School staff move around very quickly when compared to the past.

The question remains in terms of why so many schools adhere to the Ofsted framework approach to self-evaluation. One leading headteacher has stated that it is because performance tables are being judged on results, which have become the de facto measures for school success in many parents' eyes.¹⁴

3.1.3 Teacher training strategies in England

The English education system has adopted various methods for training headteachers in leadership, focusing on individual and collaborative skills. With the creation of the National College in 2000, the Government developed and implemented the National Professional Qualification for Headship (NPQH), which until 2012 was mandatory. The training covers topics such as leading and managing, enhancing teaching, and improving and maintaining high quality education. It emphasises the educational and interpersonal aspects needed in a leadership role.

The emphasis is on leadership development for both middle and senior leaders. There is a national qualifications framework for middle leaders, senior leaders and those aspiring to headship, with the more recently added qualification in Executive Leadership (NPQEL) for people

14. Interview, headteacher.

leading several schools. Although it has not been compulsory since 2012, most headteachers choose to gain the NPQH before applying for more senior management posts.

Currently, a network of support exists to promote school improvement and professional development. It consists of the following designated leaders: Specialist Leaders of Education (SLE), Local Leaders of Education (LLE), National Leaders of Education (NLE), and National Leaders of Governance (NLG). This system was introduced in 2006 when the National College formed the first cohort of National Leaders of Education (NLE), all of whom were leaders of 'Outstanding' schools, as accredited by Ofsted. Following this, a network of National Support Schools (NSS) was developed for schools in difficulty. The focus is on classroom planning, management and observation, data analysis, reciprocal visits, financial management and participation in school leadership team meetings. This network is a powerful mechanism for change.

Alongside this, about 600 schools have become teaching schools, which train new teachers and develop existing members of the profession using a collaborative network of training schools and universities. The aim is that student teachers can undertake their professional training within the school system, which in turn works within wider school-led alliances. In this way, support for raising standards is managed locally and reflects the local needs.

3.1.4 School leadership strategies in England

Regarding actual school leadership strategies, England has made important investments in the system in an effort to improve both the quality of learning and equality. Particularly with the introduction of academies, which, although funded directly via a central government agency, are locally autonomous with a certain freedom of operation in terms of curriculum and salary structure.

Academies have been set up at each end of the school quality spectrum. The Secretary of State for Education has the power to convert a failing school into a 'sponsored' academy. An academy sponsor can appoint all or most of the directors of the charitable trust to which the academy belongs, and thus take a large degree of control over the academy's strategic vision and improvement plan. Many high performing schools saw advantages in gaining academy status themselves as well, particularly because of the increased freedoms this entailed. These schools ('converter' academies) began to apply to the Secretary of State for the new status, which is granted following appropriate checks, including one by Ofsted.

Additionally, there are formal and informal collaborations between schools of all types, for many different purposes, and under many titles, such as 'chains', 'federations' and 'clusters'. At least two-thirds of academies are now in 'multi-academy trusts' (MATs). The autonomy that goes with the status of becoming an academy requires schools, especially smaller ones, to consider a number of unfamiliar issues and tasks. For example, few primary schools have the capacity to prepare employment contracts, which would usually have been done by local authority advisors. Similarly, a single academy in isolation might not have access to previously available local authority pedagogical advice or professional networking. When schools join MATs, their property and employment contracts can be held centrally by a charitable company, which then formally delegates the appropriate degrees of authority to its academies' governing bodies. Working as part of a group of schools has allowed professional development to improve teaching and learning.

Another initiative was the creation of 'free schools', enabling community groups to set up new schools in response to local needs. These free schools are a subsection of the academy format, where completely new state-funded schools can be established by coalitions of, for

example, teachers, parents, existing schools, educational charities, or universities. Free schools have some additional flexibility to preserve their nature; for example, although their promoters must convince the Secretary of State of 'sufficient' demand for the school, they need not demonstrate its absolute necessity, and pupils may be taught by staff who do not have formal qualified teacher status (QTS).

As a result, in England, the concept of school-to-school support has become the key approach for school improvement, replacing earlier traditions where local authorities were the main drivers for better standards. This new model has been accelerated by the considerable growth in the number of MATs. As described above, MATs enable schools to share their effective practice and to realise administrative economies of scale. Academy status confers certain freedoms in the deployment of budgets and the employment of staff, and some MATs benefit from access to larger pools of both funding and personnel. For example, MAT schools can increase the flexibility of their staffing deployment and succession planning programmes by working across the trust. These opportunities can help keep good staff who might otherwise move on, they also provide an enhanced promotion ladder for middle leaders and headteachers. Some of the latter may, for example, be allocated supervisory responsibility for more than one school within the MAT.

The government encourages MATs to provide school-to-school support. The prospect of 'school-to-school support' is attractive and many believe that collaboration is natural and mutually beneficial for schools. With that understanding, groups of school colleagues can be encouraged to meet regularly to share examples of good practice and to resolve shared challenges. However, to be successful it requires goodwill from the teachers involved and, over time, needs resources (economic, human and technical), as well as sustained commitment.

All schools which are engaged in working closely with others have to be aware of the delicate balance between collaboration and competition. The need to recruit the maximum number of pupils for a school in order to boost the school budget means that collaboration with geographically close schools can be tricky: 'No one tells the others what they are doing in case the others improve over their own. I would love to work more with nearby schools, but the competition element makes it difficult. We have joined another cluster which is not geographical and with them we do share school improvement ideas. It works really well.'¹⁵

The stark reality is that informal collaboration can work, but schools are so busy that collaboration can be hard¹⁶ even though governments have moved more and more to force schools to do so. From a local authority standpoint, 'informal school-to-school support doesn't work unless it is tied down and there is time'.¹⁷ The reality is that there is tension of co-operation and competition between schools, although recently converted schools tend to create more formal arrangements between themselves as a means for co-operation.

The lesson from the major initiatives seems to be that doing more than simply *encouraging* schools to collaborate is the prerequisite of sustainable success with the most difficult of schools (Ingham, 2014). However, the presence of an institution to support collaboration and exchange is required in order to support schools and headteachers in their development of leadership and collaboration.

15. Interview, headteacher.

16. Interview, multi-academy trust CEO.

17. 'Some heads will speak of collaboration but will then only collaborate with another "small" school. Some are very generous and will help and support everyone, but you absolutely know that there are some schools which are so competitive and want to maintain their standing and won't share anything!' Interview, education professional and headteacher.

3.2 Recent school leadership strategies in Mexico.

3.2.1 Educational reform and general policies in Mexico

In Mexico educational reform has experienced four waves. The first wave of reform was a decentralisation process in the 1990s and the signing of the National Agreement for the Modernization of Basic Education (ANMEB). The second wave included the Social Commitment for the Quality of Education in 2002. The third wave started with the Alliance for the Quality of Education (ACE) in 2008, and the last wave includes the 2013 Education Reform.

In the first wave the Federal government and most of the states signed the ANMEB, which agreed that the federal government would transfer the funds to operate education services and to train teachers in the different states, except in the Federal District (now Mexico City) which remained under the regulation of the SEP (Hernandez-Fernandez, 2015). The decentralisation process forced states to be co-responsible for increasing their own funds for education and for improving quality, enrolments and for guaranteeing equality. However, research has suggested that the capability to do so varied greatly among states (Latapí, 2009).

It is important to highlight that the decentralisation was not planned to reach the micro level in the education system, neither did it intend to promote school leadership. It did not entitle state educational authorities to choose their own curriculum, rather they were still required to follow the national curriculum approved by the SEP. This is why schools and teachers remained with little autonomy and little power to implement any changes apart from in administrative matters (Hernández-Fernandez, 2015).

While the best known aspect of the educational reform of the 1990s is decentralisation, it should not be forgotten that this was only one

component of it (Zorrilla & Barba, 2008). The ANMEB also included changes and amendments to the Constitution, where substantive issues were addressed: the deregulation of the educational service in 1992 and the amendment to make lower secondary school compulsory in 1993. With this, basic schooling increased from six to nine years.

Other elements of the ANMEB reform included areas of the initial and basic education curriculum as well as continuous training for teachers (Zorrilla & Barba, 2008). The reform of educational content and materials constituted a curricular and pedagogical reform both for basic education and in-service teacher training. With this, content returned to the curricular organisation by subjects. This reform also diversified the production of educational materials for students and teachers with a constructivist approach. In addition, it incorporated an institutional vision for supervision and school management in schools.

The second wave of education reform started when a new government argued that the curricular reform had problems. Therefore, the Fox administration made a proposal for a more comprehensive reform. As a result, preceded by debates around the curriculum, a curricular reform was approved for lower secondary school (Zorrilla & Barba, 2008).

Later, in 2002, the three grades of pre-school education were established as mandatory with a new reform. Three areas constituted the axis of the education reform. It began with the demand for justice and equality as a main condition for development. The government placed an emphasis on equality and opportunity access, with special attention given to large vulnerable groups: indigenous people, marginalised populations, young people and adults who have fallen behind in education, women and disabled people. To that end, compensatory programs were reinforced and a new National Scholarship System created to support disadvantaged youth in getting into higher education (Miranda López, 2004).

Moreover, the education reform of the 2000s looked at education quality as a means to achieve adequate educational results. The relevant elements included were organisational and infrastructure improvements, as well as financial resources. In the regulatory and organisational domain, the reform proposed to update the regulatory frameworks and organisational structure of the SEP, as well as the inclusion for the first time in Mexican educational history of an education evaluation system. There was also a strategy to boost evaluation and reporting information systems with the intention of establishing clearly visible and understandable indicators which would make educational results transparent. Likewise, the role of financing was highlighted and with it the commitment of the State to continue to defray the expenses of the public school was endorsed, although criteria were set in place to boost the financial participation of state governments and some other sectors of society (Miranda López, 2004).

The Social Commitment for the Quality of Education reached agreements on the following: that society, and not only authorities and teachers, would be involved in the design process of the educational model; that there was going to be flexibility so that each State or region could define the type of education that best suited their reality; that an educational evaluation institute would be created to monitor the quality of teaching; that selection exams would be used to appoint directors and inspectors; that the students had access to nutritious food at school and to a system that would evaluate health; that they had access to technology and the opportunity to learn English as a second language; and that there was a flexible school calendar so that rural students, for example, could work in the field (Flores-Andrade, 2017). All these commitments were more rhetorical than real, since many of them were not met due to opposition by the National Teachers Union (SNTE) (Santibáñez, 2008).

The third wave of education started with the Alliance for the Quality of Education (ACE) in 2008. The commitments included, among others,

the modernisation of schools to equip them with the infrastructure and equipment necessary to guarantee an adequate school environment. It was also deemed essential to train teachers and students in the use of information technologies to promote the development of skills and abilities, as well as enhancing mechanisms of participation and school management. In this regard, plans were set out to create a national school information system so that the information collected would serve to improve the management of schools.

Likewise, the ACE contemplated the professionalisation of teachers and educational authorities through the allocation of vacancies through public competition, in such a way that performance would be the basis for promotion. The creation of a national system of continuous training and improvement for in-service teaching professionals was also expected. Its purpose would be to train and professionalise teachers in order to improve their performance. Incentives were expected to stimulate performance and reward the merits of teachers; in particular, it was planned to reform the guidelines of the teaching career programme so that it would consider only three factors: a) school achievement; b) novel courses; and c) professional performance (Flores-Andrade, 2017).

In 2012, a new wave of reforms began with the presidential initiative to reform the third article of the Constitution before Congress. The initiative set out that the State must guarantee educational quality at all mandatory levels of education, the establishment of a professional teaching career service, as well as a national educational evaluation system.

In general terms, it can be said that this educational reform consists of two stages. The first stage can be described as modification to the third article of the Constitution and to the General Law of Education, and the enactment of laws on the subject, including The General Law of

the Professional Teaching Service and the Law of the National Institute for Evaluation of Education. As a result, the 2012 education reform in its first stage includes (Flores-Andrade, 2017):

- The creation of the Educational Information and Management System, as well as the consolidation of the National Evaluation System.
- The appointment of the National Institute for the Evaluation of Education (INEE) as an autonomous public body endowed with new responsibilities (for example, assessing the quality, performance and results of the national education system) and attributions (such as the issuance of guidelines by which the educational authorities carry out evaluation tasks).
- The State would ensure that admission and permanence in the teaching career service, as well as promotion to management and supervisory positions in compulsory education (pre-school, primary and lower secondary) is carried out by examination.

Following the Education Reform in 2013, the SEP submitted a proposal in 2016 for a new educational model and curriculum. The document suggested strategies to promote leadership in schools by placing the ‘school at the centre’ of the education system’s planning. However, as the structure and legal domain for States and schools remains the same, it did not provide schools with enough leeway to practice truly independent leadership and management.

Mexico still has a long way to go towards effective educational leadership. Questions remain whether the system enables schools and State education systems to make the decisions needed to improve the local school environment, and also whether the inequalities in school infrastructure and teacher training allow school actors to exercise the leadership required for a better pedagogical approach.

3.2.2 Inspection strategies in Mexico

In Mexico, inspections are performed by a school inspector who works as a liaison between the education authorities, headteachers and teachers. Inspectors are hired by the federal ministry to monitor what schools are doing and how headteachers are managing schools. In practical terms the inspector serves as an advisor when school plans are not being met. It is important to mention that, unlike the inspection process in England, the inspector in Mexico does not evaluate the performance of schools and their opinions do not have a great impact on further decisions at schools. However, inspectors have some level of influence on decision making, because of their closeness to educational authorities and their knowledge of what happens in schools.

In the Mexican education system inspectors have been proven to support school leadership only when they commit to the role of school advisor. This has not been a general situation but there is evidence that some inspectors have managed to generate meaningful relationships with headteachers, and based on that trust have assisted them in refining their pedagogical and management strategies, which has translated into better leadership.

Additionally, with the INEE's data collection and research results, Mexico has been able to obtain relevant information about schools' development. However, the INEE has never had the attribution, as Ofsted has, to inspect and supervise the development of teachers and headteachers as a means to improve school conditions and student learning.

3.2.3 Teacher training strategies in Mexico

In Mexico, the Teacher Training School (Escuela Normal) has been the main institution in charge of teacher training for the basic education level (pre-school, primary and lower secondary schools). Both the Escuela Normal and basic education are overseen by the SEP at federal level.

As a result, the training approaches for future teachers are intended to run in parallel with national educational policies (Navarrete-Cazales, 2015). However, the alignment between teacher training and the basic education curriculum has not always been met.

In the 1990s, the SNTE proposed the creation of a common model for Escuelas Normales through a basic training curriculum and education model. The curriculum at the time differentiated, with specific options for the training of pre-school, primary and secondary school teachers who would be working in different contexts (Navarrete-Cazales, 2015). The initiative was intended to articulate the theoretical and methodological content with observation and critical practice of real school processes. The SNTE's proposal was incorporated into the ANMEB in 1992. Despite the fact that the Escuela Normal held the same status of HE institutions, it remained tied up in the political struggle, and as result it cannot be considered to generate changes and research in the educational research field (Navarrete-Cazales, 2015).

The reform designed and implemented three strategies for teacher training: a) Promoting the update and training of teachers in service, through of the National Programme for the Permanent Update of in-Service Basic Education Teachers; b) Design of an economic incentive program called the Teaching Career, based on a mechanism for horizontal promotion of teachers; and c) Real increase to base salary (Zorrilla & Barba, 2008). However, the Federation continues to concentrate the regulations and directionality governs Escuelas Normales. As a result, the Escuela Normal has never enjoyed any autonomy that would favour develop school leadership and academic development.

Finally, contrary to England, the Escuela Normal trains teachers with no opportunity to get actual teaching experience until they finish

their studies and get a position in the education system. Because of this, novice teachers have historically relied on personal connections within the Teachers Union to get a job. The 2013 Reform included the introduction of examinations to enter the teaching career, and in this way 16,135 aspiring teachers got a teaching job in 2014 (Backhoff and Niebla, 2015). Nevertheless, the 2019 Education Reform changed that and stated that every Escuela Normal graduate will get a job in the education system although it is not yet possible to know how the supply and demand forces will meet a balance.

3.2.4 School leadership strategies in Mexico

One of the first strategies towards reform in school leadership was the development of a programme called *Programa Escuelas de Calidad* (PEC, Quality Schools Programme), created in 2001 during the government of Vicente Fox. This encouraged school-based management since it allowed schools to manage some of their resources and take responsibility for some areas of planning. One innovative aspect was its role in creating a school community through establishing links in the wider community and with other local stakeholders. Despite improving the role of headteachers and financial efficiency, PEC did not change the centralised planning system, neither did it effectively create a school community that promoted school leadership (Santizo, 2009). Perhaps one of the most important limitations on the PEC's success was that it was only a programme, not a comprehensive education policy. If education policy is understood to be a set of actions to solve education problems executed by a government, then the PEC was a programme within a strategy and, by design, could not reach every school in the system. In fact, only schools with certain characteristics could apply for the PEC and their participation in the programme was for a limited time. As a result, impact on the nationwide leadership and planning culture was negligible.

It is relevant to mention that there have been other attempts to create participatory and democratic environments in schools. This involved the creation of in-school organisations to implement actions in favour of participation and leadership, such as the Technical School Councils (CTE), and Social Participation School Councils (CEPS, *Consejos Escolares de Participación Social*). Their objectives were to become open spaces for the exercise of autonomous decision making in schools. However, the main problem identified by both teachers and administrators regarding the implementation of the CTE and CEPS was the hierarchical structure of the educational system and the lack of participation and leadership culture. This meant the collegial and participatory work was not anchored successfully in school culture (Santizo, 2009). As a result of the 2013 educational reform another instrument was the Technical Assistance Service for Schools (SATE, *Servicio de Asistencia Técnica a la Escuela*). The SATE's function is to offer a 'set of specialised supplementary support and advice to teaching staff and staff with management functions to improve professional teaching practice and school operation.' (Guerrero et al., 2012). The main actor behind SATE is the Technical Pedagogical Advisor (ATP, *Asesor Técnico Pedagógico*), whose function is to provide external technical support to the school. Outsourcers include supervisors, inspectors, sector managers and teaching specialists, as well as the ATPs themselves, who work in various capacities while the headteacher remains the main internal support agent.

Currently, both managers and teachers in schools need advice on educational improvement in the areas of teaching, learning, classroom management and school management and organisation (Guerrero et al., 2012). SATE will need to define which professionals are to be involved and decide whether the teaching staff should be professionalised with pedagogical technical advice or with support through school-based management. Therefore, in order for SATE to

contribute effectively to school improvement, SATE actors should be enabled with the skills, time and conditions to perform their function (Cordero, Fragoza, & Vázquez, 2015).

4

Section Four:
**Leaders and
teachers**

Educational leaders are important because they impact upon the effectiveness of schools and teaching, as well as the proper functioning of the education system in general (Boonla and Treputtharat, 2014; Lusquiños, 2015; Sirisookslip, Ariratana and Keow, 2014 quoted in Ruiz Moreno, 2017). Effective leadership has a direct and positive effect on school climate, organisation and administrative efficiency of schools, as well as an indirect but positive effect on student learning (Freire and Miranda 2014; Delgado and Santos, 2015 quoted in Ruiz Moreno, 2017). This is why it has become very common for policy makers, academics and school actors to talk about the importance of promoting school leadership and encouraging headteachers and teachers to develop their personal leadership skills (Ruiz Moreno, 2017).

Indeed, educational leaders are responsible for ensuring that teaching and learning processes improve educational practices and positively influence the attitudes and activities of teachers in school (Young et al., 2007). Moreover, school leaders are expected to improve outcomes by means of inspecting and planning everything the school community is committed to and encouraged to achieve (The Wallace Foundation, 2003). Also a school leader should provide technical and pedagogical support as well as pedagogical orientation to achieve the school goals (Ruiz Moreno, 2017).

Expectations of school leader are often high, but it is undeniable that reaching school leadership is complex. This section presents the roles and attributions of both headteachers and teachers with regards to leadership in England and Mexico.

4.1 Leaders and teachers in England

In England since the 1980s schools have been able to almost fully make their own decisions regarding most aspects of school life. Over time, the focus moved to the need for school improvement planning and the word ‘leader’ became more popular. It remains the dominant word today.

According to the data of 2016-2017, there are 16,800 headteachers, 12,600 deputy headteachers, 11,600 assistant headteachers and 38,600 middle leaders working in English Schools (DfE, 2018). There are 506,400 full-time teachers in the United Kingdom: 216,500 work in primary schools, 208,300 in secondary schools, 61,500 in independent schools and 16,700 in special schools. 425,200 teachers work in England, 22,000 in Wales, 43,500 in Scotland and 15,700 in Northern Ireland. The vast majority of teachers are female (69.5%), while only 30.5% are male. It is worth mentioning that at primary school level, 82.4% of teachers are female and this percentage is steadily increasing (British Educational Suppliers Association, 2017).

The number of teachers, in any form of leadership role in primary schools rose from 65,500 in 2010 to 79,600 in 2016. The largest increase across sectors has been in assistant headteachers and middle leaders, from 3.5% of teachers in primary schools and 5.6% in secondary schools in 2010, to 5.2% and 6.5% respectively in 2016 (DfE, 2018).

England has worked on having a period of enhanced school-level management, where headteachers gained great autonomy in management of finances, personnel and the school estate (premises), where previously services to support the school were provided by the local authority and these were paid for out of the school budget. Headteachers found themselves drawn away from the core business of teaching and learning and this caused many to find the lack of

time to focus on classrooms, teachers, and students, very frustrating, especially when the expectation in terms of accountability was that the headteacher was still to be the pedagogical leader.

One headteacher of a stand-alone school puts the dilemma clearly: 'A lot of heads feel they are not as involved in teaching and learning as much as they would like. The administration of the role is now huge! I battle every day to spend as much time as I can with children and staff, but this comes at a cost in that I never get any of "my" [management] jobs done during the school day ... I think school management has increased by stealth and with an ever-diminishing local authority, more and more of management is laid at the school's door. Added to this is how schools have to develop leadership capacity in their own schools while offering support to other schools. I think the pull for some leaders means that aspects get neglected and that is how they quickly find themselves in negative [Ofsted] categories.'¹⁸

The situation in multi-academy trusts is somewhat different. Although generalisations are dangerous, many MATs have created teams of administrators for what they call their 'back-office functions', which include finance, personnel and premises, and these serve all the academies in their group. By pooling the functions, the leader of each individual academy is free to spend more time on teaching and learning – a major selling point for potential future school leaders. MATs generally use the title 'head of school' or 'principal' for their school leaders in order to distinguish their roles from those of headteachers in stand-alone schools.

One criticism of MATs is that they reduce the autonomy of individual school leaders. This could potentially deter an existing head from

18. Interview, headteacher.

joining a MAT, but it would not necessarily put off candidates who have an enthusiasm for teaching and learning.

Purist believers in the importance of the ‘teacher’ part of the title ‘headteacher’ insist that teaching should remain a vital core duty of the school number one leader whatever the technical status of the school. For John Tomsett, ‘all members of school leadership teams should be respected practitioners who are at least good and working towards becoming great teachers’. He says: ‘There is a huge fork in the road for headteachers: one route leads to executive headship across a number of schools and the other takes headteachers back into the classroom to be the headteacher’ (Tomsett, 2015).

Leadership in MATs can, of course, be said to lie now with chief executive officers or executive principals, a fact which can divide opinion. This is especially the case when it is suggested that experience as a teacher or headteacher need not be a prerequisite to becoming a CEO or executive head.

Today, stand-alone schools, whether local authority-maintained schools or academies, have found that support facilities are no longer supplied by the local authority as in the past, and they need to buy them on the open market. This ‘open market’ approach has advantages, but it also demands substantial time and care if standards are to be maintained.¹⁹ The job of such headteachers to maintain the function of *leader* of teaching and learning while simultaneously *managing* the complexity of a small-to-medium sized business has become much more challenging.

For English headteachers, as in any other part of the world, leading a school is not easy. The challenges of managing the complexity of a

19. ‘The autonomy to appoint our own staff and manage our own budget is brilliant.’ Interview, headteacher.

school include being a role model and source of inspiration for teaching and learning, improving the level of achievement and safeguarding students. All this happens while managing financial resources and being accountable to the governing body, parents, the funding authority and other stakeholders across the wider school community. This makes the modern role of the headteacher in England a significant responsibility, so, although the educational system infrastructure is set up to alleviate pressure from headteachers and support them, the ability to delegate and to work collaboratively within and between schools is vital.

Middle leaders also play an essential part in English schools. These positions not only improve the management of teaching and learning, but also provide a career pathway for aspirant future leaders. Some outlier headteachers have managed to run their schools without giving leadership responsibility to their teacher colleagues, but for the great majority, sharing leadership has become essential to school success.²⁰ The size of school can be a determining factor, and with many primary schools now over one thousand pupils strong, it is a widespread and expected feature. Middle leaders will lead core subjects, manage a phase, lead aspects of teaching and learning in their subject, and act as mentors to more inexperienced staff. They hold national leadership qualifications and have led whole-school projects for which they are accountable.²¹

Initial teacher training in a university or college involves teaching practice in classrooms which gives student teachers a more practical insight into the job. In this respect schools are taking more control of the area, with 600 Teaching Schools having responsibility for organising initial teacher training. These training schools form

20. 'In a medium size primary school seeks to relieve teachers of much responsibility for things beyond their own classroom and therefore no longer has a tier of middle leaders.' Interview, headteacher.

21. Interview, headteacher.

alliances with other local schools to perform their role. They also provide continuing professional development for existing teachers and leadership development opportunities, as well as being involved in research and evidence-based practice. There are also now several school-based routes which are run either by Teaching Schools or by Charities such as Teach First. In these cases, the majority of training is school based with the student then attached to a University, College or other accredited provider for the academic input. Schools like having trainee teachers with them, and the trainees themselves enjoy the early immersion in school life. Schools which are rated at least 'good' by Ofsted can become teaching schools and the number has increased in the past three years, as they make a growing contribution to the mixed menu of training and development opportunities available to schools and teachers (DfE, 2016b).

Another aspect of the apprenticeship approach is the increasing encouragement for unqualified teaching assistants to undertake part-time training while being paid in their assistant role. The school gains staffing capacity and the assistant has the opportunity to decide whether teaching is the right career.²²

Despite these positive aspects of the model there is a high rate of novice teachers quitting their jobs – and the profession – with the most common reason being 'workload'. In other words, teachers are asked to do too much in the time they have available and the balance between their personal and professional lives does not suit them. Another possible explanation for the loss of so many teachers is the weight of expectations on their planning and assessment roles. A 'fear' of Ofsted is a key driver in many schools and keeping up with the number of required planning proofs and evaluations is very time-

22. Interview, former HMI and Ofsted inspector.

consuming. Conversely, confident headteachers and principals have been bold in reducing that aspect of work and feel surprised that so many schools still insist on elaborate lesson plans and multiple-level marking of work which is undertaken in the mistaken belief that it will impress Ofsted inspectors.

In recent years the composition of the student body has, in the opinion of some, made the job of teachers more challenging than ever.²³ The enhanced pressure comes from the diversity in classrooms which can make the job very difficult, for instance the proportion of pupils with special educational needs has increased in recent years, as has the number of students for whom English is not the first language.

Moreover, the range of subjects to be taught and the increased depth and complexity of learning expected has increased the level of challenge for teachers. From 2014 to 2016 there were changes to the national curriculum and assessment standards which caused consternation in schools. The measures, which in themselves, were welcomed by many teachers and school leaders, added considerably to the pressure on schools because of the speed with which they were introduced. The curriculum changes in 2014 meant that less had to be taught but it had to be taught deeper, and this change was not easy to implement.

In the autumn of 2014, Ofsted announced the decision to include class observation as a means of improvement, with Sir Michael Wilshaw, the then head of the body, writing; 'What we will do is look at lessons across the curriculum, across the school, and make a judgement of the strengths and areas for development. And most important we will see if the headteacher agrees with us.' (TES, 2016). The announcement

23. Interview, headteacher.

caused considerable anxiety, but generally teachers did not oppose the changes. On the contrary, many saw it as a professional development opportunity. To be formally observed is an expectation for teachers in English schools, but the habit of awarding grades to observed lessons has been mostly dropped both by school leaders and Ofsted inspectors. Teachers had become used to the 1 to 4 grading system and it has taken time for the benefits of the change to be fully appreciated. Most leaders who have responsibility for observing colleagues believe the move was important. 'At first, teachers were disappointed not to receive a grade, but it has made them more reflective with a real focus on what could be improved in their teaching.'²⁴

Based on the report *School leadership in England 2010 to 2016: characteristics and trends* we can provide data on the characteristics of school staff. The number of teachers who were newly promoted to a leadership position each year increased from 25,400 in 2011 to 38,100 in 2016. In primary schools, there was a smaller proportion of teachers in leadership roles in stand-alone academies (33.2%) compared to MATs (34.3%) and local authority maintained schools (36.4%). It is also relevant to mention that the age for teachers varies greatly from 2010 when compared to 2016. There is an overall decrease in the size of older cohorts, and an increase in size of the younger cohorts. In 2010, half of headteachers were aged 51 or less, compared with half aged 48 or less in 2016. Virtually all promotions into middle leadership were after the age of 23, into senior leadership after 27, and into headteacher roles after 31. Moreover, more than 20% of those in teaching had a leadership role by the age of 27. In 2016, for those teachers aged 35 or above, over half of teachers in service were in a leadership position; this compares with age 49 or above for the equivalent in 2010 (DfE, 2018).

24. Interview, headteacher.

4.2 Leaders and teachers in Mexico

In Mexico the highest authority in compulsory school education is the headteacher. The Mexican headteacher management role includes defining goals, strategies and policies for the operation of the school, analysing and solving pedagogical issues and reviewing and approving the curriculum plan devised by the teaching staff, as well as more irregular or unforeseen tasks like designing strategies to address students' behaviour, and dealing with violence outside and inside schools (de la Cruz, Razo, & Cabrero, 2019). Of the total number of staff dedicated to basic education in Mexico, 5% are headteachers who exclusively dedicate their time to school management and administration issues. Additionally, 4% of staff hired by the SEP hold the position of headteacher but also carry out teaching activities in the classroom. As a result, 9% of the staff working in basic education have the position of headteacher, and 55% of them are exclusively dedicated to management work, while the remaining 45% play a double role as leaders and teachers. This data was electronically obtained by the Educational Information and Management System (SIGED) under the SEP (2016-2017).

Furthermore, 24% of staff hired by the SEP consist of heads of education, supervisors, prefects and administrative staff. This data is surprising as the amount of supervision staff is more than double the amount of actual school leaders.

It is relevant to mention that there is no public information to check the profile of headteachers in Mexico. However, the SEP states that the profile for headteachers in basic education 'expresses the characteristics, qualities and desirable abilities for the efficient performance of the functions of the directive personnel in the schools of basic education'. Headteachers are subjected to continuous training programmes that help strengthen their abilities (SEP, 2015).

In Mexico, the headteacher presides over two collegiate bodies that assist in the functioning and organisation of schools: The Technical School Councils (CTE) and the Social Participation School Councils (CEPS). Teachers, parents, and other members of the school community all participate in those two bodies. However, they are only entitled to make recommendations, and ultimately it is the headteacher who has the final say in their meetings. Subsequently, the area inspector (supervisor) or the corresponding director or 'delegate general' further reviews any recommendations, in practice making the final decision (Santizo, 2009). Therefore, although it appears that headteachers have a lot of power within their schools, that power is largely restricted to what the legislation entitles them to do within the confines of the education structure. This largely amounts to managing the money that comes directly to the school (Ornelas, 2008).

In addition, basic education schools have little contact with each other or external organisations, meaning the support network is weak. Ávila and Rangel (2005), cited in Santizo (2009), reported that the relationship of trust between the community stake holders and schools is mainly the work of the headteacher. In other words, the leadership, communication and collaboration skills of headteachers as well as their motivation to interact with the community, make it possible to generate links between school and community. However, if the leading ability of a headteacher is limited or lacking, the link between school and community will be restricted and the support network further reduced. In that sense the Mexican education system does not encourage school-to-school support as the English system does. Schools are seen as isolated entities and headteachers have found it a struggle to get information on what is happening in other establishments.

The number of links between schools and their extended communities can be observed indirectly through the additional resources they obtain. Data from the PEC's external evaluation showed that resources

obtained by schools from non-state community actors represent almost 10% of their budgets. This fact deserves to be highlighted, as the PEC schools were required to promote interaction with their community and with other schools. The PEC program completely disappeared in 2018, resulting in the absence of incentives for schools to liaise with each other or to practice the PEC leadership skills.

UNAM (2007) conducted a study with parents about their opinions on the leadership skills of headteachers, which in general were favourable. In state schools the percentage of approval was lower than that of parents from private primary schools at 63% and 87%, respectively. Parents rated the ability of state school headteachers to handle difficult situations as acceptable, with 56%, although considerably lower than the 78% earned by headteachers in private primary schools. Hence, there is a perception that headteachers from private schools are better leaders than those in state schools (UNAM, 2007). This raises questions, such as whether there is a difference between the kind of headteacher hired by each type of school. In other words, could the training, experience and abilities valued by private schools explain the difference?

González, et al. (2008) point out that Mexico has a problem with school leadership because of a lack of teamwork tradition, an inefficient education system structure, a lack of technical preparation for teachers carrying out co-ordinated work, and a lack of resources to motivate working groups. The authors conclude that it is essential to have specific management training which is contextualised and has an effect on career prospects.

With regards to teachers in Mexico, in the 2013-2014 school year, 1,201,517 teachers taught in 228,205 primary schools, while 273,939 teachers worked in lower secondary schools. The volume of teaching staff shows how big the Mexican education system is when compared

to the English one. At pre-school and primary schools, teachers are mostly women: 93% of teachers in pre-school are women; in primary the female presence decreases to 67%, while in secondary school 52% of teachers are women (INEE, 2016). With respect to age, it can be noticed that in pre-school there is an early entry to the profession as 30% of teachers are between the ages of 18 and 25. Conversely, in primary and secondary schools only 7% and 3% of teachers are that young, respectively. In pre-school, educators retire earlier than primary and secondary school teachers. So, while at pre-school, teachers of 55 years and older represent just 2.2% of the total, this proportion is to 6.4% and 8.4% in primary and secondary, respectively (INEE, 2016).

As mentioned earlier, historically in Mexico, the institutions responsible for the initial training of basic education teachers have been mostly Escuelas Normales. However, given the inclusion into compulsory education of lower secondary school in 1993, pre-school in 2011, and the curricular modifications to plans and programmes of basic education, the number of required trained teachers increased greatly. Therefore, the education system demanded teacher training to take place in private institutions and other HE institutions (Roque Gómez & Mandujano Zambrano, 2016). As a result, the government created the National Pedagogical University (UPN) and opened the door to private universities to collaborate both in the levelling-up of pre-school and primary school teachers who did not have a degree, and the training of new teachers. In parallel the government pushed to transform the Escuelas Normal into HE institutions (INEE, 2016). Over time, universities gained validity and high proportions of young teachers with a full degree at all levels of basic education have teaching positions within the public education system.

Moreover, the schooling patterns of basic education teachers, disaggregated by ranges of age, reflect changes over the past ten years. The level of schooling of teachers in pre-school, primary and

secondary show that the younger generations of teachers are more educated than those close to retirement. In addition, the number of postgraduate teachers has increased. It is also observed that the proportion of teachers who are exclusively recognised as *normalista* (a teacher who studied at a Escuela Normal) has decreased, while the number of university graduate teachers has increased (INEE, 2016).

In terms of continuous development, for several decades, various federal and state level actions have been implemented in Mexico. In 1971 the Federal Teacher Training was created under the General Directorate of Professional Improvement of the Teaching. Twenty years later a programme was launched for teachers' continuous education: The National Programme for Permanent Teachers Update in Basic Education Service (PRONAP), and more recently the National System of Continuous Training established the Programme for Professional Improvement of Teachers in Service. As can be noted, various systems coexist for the development of teachers' continuous training and development. However, the great diversity of programmes reflects how incoherent the teacher training policy is.

Moreover, there is not enough systematised information on the programmes, plans and activities for continuous education and professional development that are offered to teachers in basic and upper secondary education. What we do know is that there is very limited financing in place for training to be available and accessible to all teachers (INEE, 2016).

Within the framework of the 2013 educational reform, new powers were granted to strengthen the autonomy of management in schools. This increased freedom could be used by teachers and headteachers to develop leadership; however, in practical terms, the reform focused only on the evaluation of teachers and very little attention was placed on providing training. The reform stated that underperforming

teachers would have available training and resources for continuous development, but the promise was never met. As a result, schools in general show a certain level of resistance to change, which limits the development school leadership.

The obstacles to performing great school leadership are also related to the lack of motivation and confusing objectives provided by the government. Additionally, the Teachers Union causes division and has a lack of organisation that does not allow collegiate work and the implementation of projects and improvements (Roque Gómez & Mandujano Zambrano, 2016). Teachers have reported feeling pessimistic and unhappy about implementing changes, as they feel harassed by the school community and the union. A large part of the teaching staff has expressed its rejection of the implementation of reforms, arguing among other things that they violate their labour rights and put their permanence at stake (Roque Gómez & Mandujano Zambrano, 2016). Hence, the education system has still a long way to go to create the necessary environment for teachers and headteachers to implement real leadership.

5

Section Five:
**The role of
accountability and
evaluation in school
leadership**

In many countries, control mechanisms are being implemented to increase monitoring and accountability in the education sector. In addition to inspection systems, market mechanisms have been introduced as new forms of accountability to improve school performance (de Wolf & Janssens, 2007). Those reforms have generated discussions on the advantages and disadvantages of different external control mechanisms in education. Nevertheless, accountability systems are built on the foundation that schools have to be accountable, parents informed and performance indicators used by pupils and parents for school choice (de Wolf & Janssens, 2007). Thus, information on quality can increase active involvement by stakeholders and help ensure education quality in schools. This section explores the accountability and evaluation strategies in place in both England and Mexico and how they are used to foster school leadership.

5.1 Accountability and evaluation in England

Thirty years ago, the data available on school performance in England was negligible. Today it is all-pervading, and teachers spend a great deal of time analysing data they produce. However, it remains unclear whether schools are better because of the time they spend accumulating and analysing statistics.

In practice, every school in England has systems and staff members to deal with the data which is a major feature of school accountability. For some reports on school progress, data has come to dominate prose description. Serious doubts remain, however, about the validity of many conclusions made on the basis of dubious data collection. 'How deep is the school's understanding of the data it collects? How much is truly

diagnostic, informing future teaching rather than satisfying the hunger for more questionable evidence of progress?²⁵

Schools often lament the testing industry that has grown to feed this hunger for data and they ask why teacher assessment is not used instead. One simple answer is that teacher assessment is not always reliable. There is always the possibility that there could be a feeling in some quarters that teachers might have an inevitable tendency to inflate the progress their students make. Equally, it is not inconceivable that politicians might not trust teacher assessment to give them an accurate and reliable picture of how things stand, and therefore insist that for overall judgements of schools, formal, summative tests should still be used.

There is a real issue for school leaders in that they need to report regularly on student progress and have up-to-date data for when Ofsted arrive. Should they introduce more formal testing, thereby increasing the reliability (at least of the test outcomes) of assessment? This relieves some of the burden of assessment from teachers but also de-skills them in terms of knowing in precise terms how well their pupils are doing. The alternative is to rely on the expertise of teachers and their assessments. But the important point is that the school has a choice, where headteachers can use their leadership skills and experience to define the strategy and be accountable for it. It should be remembered of course that inspectors are human and have individual views and hunches. We should be wary of taking inspection reports and judgements as scientific truth.

Inspectors depend on school data when drawing up hypotheses before visiting a school. The phenomenon of ‘gaming’ the accountability

25. Interview, headteacher.

system means there is a constant concern that some schools ‘massage’ the data and assist pupils during testing: ‘We hear lots of examples of cheating on the tests. Some schools transfer pupils at age eleven whose standards are not what the record says. Schools also lower the “on-entry to school” levels of children to inflate the progress of their pupils. Playing the system means people don’t trust the judgements of Ofsted’.²⁶

More and more school leaders are losing their jobs when an inspection goes badly. Ofsted does not, of itself, force change: ‘Ofsted in itself is not a pressure. It just provides the judgement, on the basis of which others exert the pressure. What it does mean is that the stakes in an Ofsted inspection are even higher than before for the diminishing number of schools which are not good or better. The pressure on schools less than good has ratcheted up. Inadequate schools now automatically become academies. It is mandatory. The Department for Education will brook no other option.’²⁷

There are myths surrounding the work of Ofsted, and too many schools implement policies or demand specific behaviours from their teachers in the belief that Ofsted requires them. The approach to marking pupils’ work is a good example. Many schools encouraged different coloured pens for comments on pupils’ work, some used by the teacher, others by the pupils who were asked to respond to the teacher. The amount of work produced by this impressive but unsustainable to-ing and fro-ing of comments added substantially to the administrative burden on teachers.²⁸ Ofsted inspector, Sean Harford has resorted to issuing a statement that comments about marking will from now on

26. Interview, headteacher.

27. ‘5% of schools are currently judged inadequate and 15% requiring improvement. 80% are good or better – a figure that has never been higher!’ Interview, former HMI and Ofsted inspector.

28. Interview, former HMI and Ofsted inspector

not be included in reports ‘other than whether it follows the school’s assessment policy. Inspectors will also not seek to attribute the degree of progress that pupils have made to marking that they might consider to be either effective or ineffective ... inspectors will not make recommendations for improvement that involve marking, other than when the school’s marking / assessment policy is not being followed by a substantial proportion of teachers; this will then be an issue for the leadership and management to resolve.’ (Harford, 2016). Whether school leaders should live in fear of Ofsted is a moot point. The fact is that it continues to exert tremendous influence on schools.

The English supervision system has an effect on school climate. For a headteacher to lead a school from ‘requires improvement’ to ‘outstanding’ by jumping the category ‘good’ altogether is an exceptional and remarkable event. How does the headteacher reflect on the experience?

Our inspector was good at seeing the whole picture and realising that the starting point for our children is very low. Even to get them to the national expected level is exceptional. The children’s thirst for learning and knowledge really shone through on the two days they were here ... [we had] a very fair lead inspector, not out to punish us for one poor reading result. They showed an understanding of schools in our area ... I believe Ofsted serves a purpose – a watchdog to see that standards are the same ... but between teams there are variations and sometimes hidden agendas, things the individual inspectors are passionate about. They can be like a dog with a bone, not letting go until they have the answer that matches the response they are looking for. We know of wonderful schools that are just judged to be good when we all know they are

*outstanding ... the inconsistency can cause disbelief. We have heard of people saying about our result, 'What! [our school] outstanding?!' There can be a lack of trust of the judgements.*²⁹

In truth, to be outstanding is an intangible, cultural thing. Successful schools now receive shorter inspections and can be left alone by Ofsted if their data shows no sign of deteriorating, but the feeling of 'fear' is a reality.³⁰ What this demonstrates is that an education system that offers high standards to all is achievable. There is now a generation of children who have known nothing but high standards of education throughout nursery and primary and secondary school.

If there has been an explosion of data domestically, there has been an equal interest (among politicians especially) in seeing how well students, and by deduction, schools, are doing when compared with their international equivalents. The Programme for International Student Assessment (PISA) is undertaken every three years and tests 15-year-olds' abilities in science, mathematics and their home language. 'This year's report, which has a science focus, revealed that the country has climbed from 21st place in 2012 to 15th place in 2015, despite a fall in point score from 514 to 509. The UK has also climbed two places for reading, rising from 23rd to 21st. However, despite attempts to replicate the educational practices of East Asian countries, the UK's performance in maths has fallen, with the UK dropping from 26th to 27th in the rankings'. (Gurney-Reid, 2016).

29. Interview, headteacher.

30. Interview, headteacher.

5.2 Accountability and evaluation in Mexico

In recent years Mexico has invested significantly in the assessment of academic performance at various school levels and the dissemination of results, with the establishment of The National Evaluation of Academic Achievement at School Centres (ENLACE operated by SEP) and the Quality and Educational Achievement Exams (EXCALE operated by INEE). However, efforts to introduce and support accountability in schools remains unsuccessful and not sustained (Tatto, Schmelkes, Guevara, & Tapia, 2007).

Although the evaluation of student performance could be considered an important step forward, especially considering the previous opacity in this area, it is necessary to state that the measurement of academic results among students represents only one small link in the full chain of decisions and interventions required for a comprehensive system of accountability (Cárdenas Denham, 2010).

The absence of an accountability and evaluation system can be explained by a lack of budget as well as the lack of technical, organisational and political support. Moreover, the lack of transparency relates to the prevailing obscure political culture (Winkler, 2006 cited Cárdenas Denham, 2010). Additionally, by institutional design the federal government has exclusive attributions for the evaluation of the education system and students. The design of plans and programmes, as well as control over the hiring and promotion of teachers lies solely with the SEP. This excessive administrative centralisation has reduced the opportunities for states to generate local policies and for local schools to collect data.

Some actions taken in recent years however suggest a reorientation in the management of the education system regarding the generation and dissemination of information that would allow evaluation of its

performance. The creation of National Institute for the Evaluation of Education (INEE) by the federal government in 2002 and significant central investment for a census on learning assessments in primary and secondary schools are examples of the type of programmes and actions that increased the information available for performance evaluation.

The INEE provided the Mexican education system with domestic data that had not previously existed, and developed its own information collection instruments for measuring processes and results. With this in mind, it might have been able to expand its role into measuring professional development, using similar instruments such as tests and context questionnaires for students, teachers and headteachers. However, with the 2019 Education Reform the INEE will disappear, so we need to wait until the new centre is formed to understand its attribution and scope. The new centre has an excellent opportunity to expand its scope and make itself more relevant and useful in its support of schools, not only with information but also in fostering school leadership with development and training for school actors.

Is relevant to mention that it would not be appropriate to call the INEE the ‘Mexican Ofsted’ as its attributes are very different. The INEE never had the mandate – as Ofsted does – to inspect and supervise the development of teachers and headteachers as a means to improve school conditions and student learning. In particular, the INEE does not perform any kind of school visit as a means of inspection because staff from the education ministry are responsible for that. In this sense, Mexico still lacks an independent institution for evaluating the education system’s performance which has the level of involvement and importance of Ofsted.

Mexico, like England, places importance on the results of international evaluations, and according to the results of PISA 2015, Mexico performs

below the OECD average in science, mathematics, and reading. Since 2006, Mexico has only improved by five points in science. In reading, PISA 2015 results show that the average score has lowered by two points since the 2009 results. Mathematics performance improved by 23 points between 2003 and 2015, however, 2015 results dropped by 11 points compared to 2009.

Moreover, Mexico outperforms Latin America in all three subjects by only a few points. These results arouse public interest and provoke heated debate on the adequacy of the system, the quality of teaching and schools and the efficiency of investment. As in England, when Mexico's PISA results arrive the public argues that there have been policy failures, and that students are badly prepared to face the globalised world. However, these debates do not result in changes of approach, and education policy is still not informed by this identification of fundamental problems.

6

Section Six:
**Final reflections,
lessons and insights**

The education literature suggests that school leadership is key to influencing student levels of achievement, through promoting effective teaching and learning and by inspiring and motivating teachers. Leadership also impacts on the overall school climate. The results of a meta-analysis with 27 cases of school leadership conducted by Robinson et al. (2008), show that the dimension of school leadership with greater effect on student learning outcomes is 'to promote and participate in teacher learning and development.' In support of this finding, some of the most influential work on school leadership suggests that leadership and its relationship with school improvement is closely linked with the importance of headteachers' work in the dimension of learning and teaching practices (City, Elmore, Fiarman, & Teitel 2009; Elmore 2000 quoted in cited in de la Cruz et al. 2019). Therefore, the means by which an education system fosters (or not) school leadership is extremely important as it may define not only the quality of education students receive but also their overall school experience.

As this book highlights, the education contexts of England and Mexico are very different. Those differences are observed not only in their respective educational structures but in their means of supervision and data collection, leadership strategies, the attributions of school actors, and so on and so forth. This book intends to perform a revision of both countries educational contexts, focusing on recent developments from 2014 to 2018 that strengthen school leadership at different levels of the education systems. The aim in doing so is to identify possible options that can strengthen and inspire changes that can foster school leadership in a more meaningful way. The comparison between the English and Mexican contexts shows that both countries are trying to implement school policies for leadership; however, neither of them have had an easy path in doing so.

As previously stated, this volume does not suggest a ready-made formula for developing school leadership. On the contrary, it is believed that a single approach to improving a country's education system does not exist, and it is noteworthy that England experienced difficulties when implementing new strategies to improve school leadership. This report emphasises the history and context of both countries, in order to analyse the issues that take place in the implementation of changes. Furthermore, learning happens during any implementation process, and, in this way, perhaps both countries could learn from each other in the development of future school leadership policies and strategies.

England has experienced political turbulence in the past few years. Notwithstanding this, it is interesting to witness certain continuities in the education policies under successive administrations. For example, the diminishing role of local authorities, the professionalisation of the teaching workforce, and the publishing of test results and inspection reports as levers for improvement. As in many other parts of the world, funding pressures have been an issue. The government has recently grappled with a national funding formula for schools, which attempted to anticipate the difficulties of pleasing all stakeholders at a time of limited funding.

Moreover, the DfE itself has become smaller. Fewer officials are employed and the means of delivering support to schools have become less direct. For example, courses and qualifications, designed by the National College for Teaching and Leadership, are now offered by private providers and teaching schools, and the role of central government has become more one of creating and operating quality control. Conversely, spaces for school leadership have opened up, and school staff are making use of the possibilities for defining different ways of management and interactions.

Mexico has also experienced a great deal of political change. In 2000 the political party that had governed for 71 years lost the general election, opening a new political chapter with different political wings alternating in power. The new government in 2000 surprised people with its ideas for education. For example, the aforementioned INEE was the first attempt to evaluate the quality of education and promote accountability. At the same time, the previously described PEC programme was designed to promote leadership and transparency in schools. Those two strategies were a breakthrough in the education system, because they opened a door to reassessing education policy design. However, the political context has had a very strong effect on education design and every time a new government assumes power it tries to make a statement by rebuilding the education system. The most drastic example of this is with the new Mexican government that has revoked a very recent education reform – which had not been evaluated by its results – and cancelled the operation of the INEE.

England shows concrete evidence of progress in the infrastructure, as well as the educational and inter-personal aspects, of school leadership and management. This may well inspire policy makers and encourage them to develop appropriate solutions for the Mexican education system. It is worth mentioning that the development of school leadership in England is an ongoing process. It sits alongside a wealth of other initiatives that started with the Education Reform Act of 1988, which was far from being a ‘ready package’ of reforms. Since then, there have been a series of decisions designed to improve education, all of which required political courage and will (Ingham and Nogueira, 2014). From 2014, England has experienced considerable changes aside from the leadership issue. For example, there were three different education ministers between 2014 and 2017, who passed a series of separate initiatives that affected curriculum and assessment, as well as making structural changes that saw many schools converted into academies, which later led to the development of ‘free schools’.

The latter shows that political issues have an impact on education policy in the same way as we observed in Mexico.

In this regard, the two countries still face the challenge of separating politics from policy design. Although the English system shows us that it is possible to encourage headteachers to engage and co-operate with each other to achieve a common goal, policy makers need to engage more in the discussion about which types of schools are needed, how to evaluate and supervise in a more effective and adequate way, and the best way to make schools come together to promote better planning. Also, discussion is needed around developing a more efficient process of budget allocation and allowing schools more flexibility in managing their resources.

It is undeniable that the process of globalisation has brought challenging fiscal circumstances and complex relationships between countries. Thus, the importance of high-quality education provision is more pressing than ever. Both the English and Mexican education systems need to adapt to the demands of contemporary society.

The English school system provides an example of changes that have aimed to promote more effective school leadership. The system has gone for a meaningful decentralisation, that despite the struggle, has made school staff more responsible than ever for what happens inside their schools. Conversely, although Mexico has also focused on decentralisation, the process has not fostered independent school leadership, either at school level or at state level. States and schools remain subordinated entirely to federal-level direction, and little space has been given for individual schools to propose, innovate or execute policies. There are however some examples of how well schools can do when allowed to manage some of their own resources and contribute to planning. Therefore, it is desirable that the changes to be implemented as a result of the 2019 education reform do not disregard

previous experiences and instead provide schools with enough leeway to practice truly effective leadership and management.

With regards to supervision and inspection, England devised the Ofsted school inspection system as a tool to improve schools. Inspectors work as liaison between the education authorities, headteachers and teachers, and part of their function is to provide advice, as well as to intervene in educational processes. This intervention has promoted the exchange of ideas and incentives to support school improvement. Mexico does not have an equivalent inspection system. However, the newly appointed Technical Assistance Service for Schools (SATE, Servicio de Asistencia Técnica a la Escuela) and the Technical Pedagogical Advisor (ATP, Asesor Técnico Pedagógico) do provide external technical support to schools. Both SATE and ATP will remain part of the 2019 Education Reform, and it is important to make use of the support they can provide in improving professional teaching practice and school operations for headteachers. Specifically, the advice required by school managers and teachers is on teaching, learning, classroom work, school management and organisation. In addition, teachers need support in developing their own leadership skills, as well as guidance on how to relate to the school community in a more formal and institutional manner.

An additional point to note is that the English education system encourages its schools to evaluate themselves, while at the same time having a rigorous public accountability system in place. Achieving a balance has proven to be an issue, as the continuous inspections increase the risk that some schools will focus their efforts on external accountability rather than internal improvement. In Mexico, accountability and evaluation efforts are recent initiatives. The INEE had designed collaborative spaces for state educational authorities, education specialists and members of civil society to discuss proposals that enrich education performance and strengthen decision making. In

2015, the INEE released the first set of guidelines for improvement, focusing on improving the initial training of basic education teachers. This represented a significant contribution to the commitment of improving the quality of education and evaluation.

However, significant challenges remain in promoting school accountability and identifying areas for improvement in students' learning. The new government decided to dissolve the institution to create a new centre, and this has a great opportunity to enhance the quality of the Mexican education system. The Mexican system needs an independent institution that can evaluate educational performance and define strategies to improve. Ergo, the Mexican education system needs to strengthen the role of the new centre, so it can observe teachers' practice, make recommendations and provide guidelines for improvement. Most importantly, evaluation on its own does not help teachers and schools improve; the new centre also needs to support teachers and headteachers develop through relevant training and courses that help them achieve their maximum potential.

Mexico still has a long way to go towards effective educational leadership. Therefore, special effort is needed in enabling all areas, from individual educators to school managers and state education systems. It is also important to mitigate against the inequalities in school infrastructure and teacher training. This approach would give all actors the opportunity to learn and exercise the required leadership skills which contribute towards the shared goal of improving students' learning. In addition, an impartial supervisory body should not only evaluate but also support this educational change.

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