

Evaluation & Local Capacities: Is It Possible to Rebuild Federalism?

From INEE

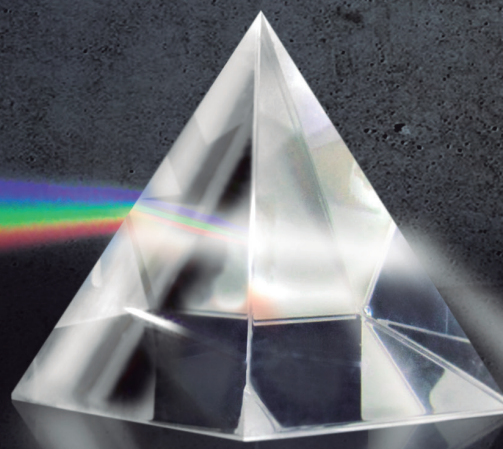
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International Experiences

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National Perspectives

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Special Report: Multi-Grade Schools

Local Building of a Federal Evaluation Policy
Attention to Diversity: Diego Juárez Bolaños
Educated in Nature, an Experience in the Mountains
of Veracruz: Jay Griffiths



With Computer Graphics and Texts in
zapoteco, maya, mixteco, otomí y totonaca.



The logbook

National Educational Evaluation Policy Gazette in Mexico

Year 2, No. 6 / November, 2016-February, 2017

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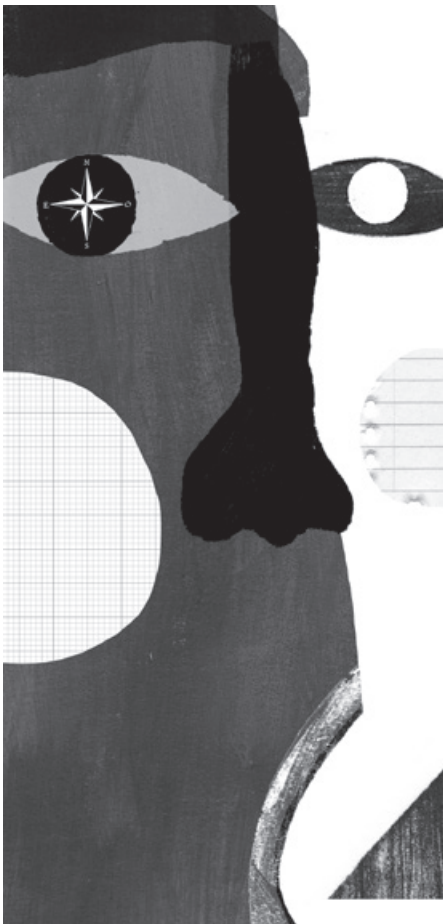
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Evaluation & Local Skills: What Kind of Federalism Does INEE Seek?

Life is—essentially—a dialogue with our surroundings. To live is to coexist, and the other that coexists with us is the surrounding world. Therefore, we cannot understand a vital act, no matter which, if we do not connect it with the environment to which it leads.

José Ortega y Gasset,
The Revolt of the Masses

MEMBERS OF BOARD
OF GOVERNORS OF THE INEE



The content of this edition of the *National Educational Evaluation Policy Gazette in Mexico* arises from the following concerns: Is educational federalism a viable option for the improvement of educational quality in Mexico? In what measure does educational evaluation enter into this concept? How should it be implemented so it participates in favor of the right to quality and equitable education as mandated in our Constitution? Where do we begin? What experiences and lessons can we learn from other countries? And, on the face of this task, how has the National Institute for Educational Evaluation (Spanish acronym: INEE) walked along this path and what kind of federalism is it searching for?

To begin with, it is clear that the history of the reforms to the Mexican Educational System has not been an isolated journey; but, rather, it forms part of the decentralizing actions in Latin-American countries.

In 1980, Chile became the continental laboratory for the application of educational reforms. On their part, in the 90s, Argentina, Colombia, Costa Rica, Panama, El Salvador, and Brazil carried out their respective restructuring (López Guerra *et al.*, 2006). Mexico joined this structural change in 1992, with the Elementary Education Modernization Agreement (Spanish acronym: anmeb). This was followed in 2004-2011 by the Preschool Reform, the Comprehensive Secondary Educational Reform and the Elementary Education Articulation.

The recent 2013 Educational Reform, implied changes in form and content —such as the creation of the Professional Teaching Service (Spanish acronym: spd) and of the INEE as an autonomous constitutional body; the review of administrative decentralization and federalization; the emphasis on schools as the center of political and educational system concerns; the adjustment in the transfer of financing and scrutiny on the compliance of the maintenance and equipment tasks for elementary education schools, teachers' schools, and pedagogical universities under the charge of entities and municipalities; the establishment of compensatory programs; and the definition of the gratuity policy for disadvantaged population.

Within the framework of these important educational transformations, we can affirm

that—today—the recovery and strengthening of State's rectoria on education necessarily implies the strengthening of local skills and the promotion of educational development from a local perspective, and this places the entities' voices on the stage while shaping a scenario for the construction of public policy from the local to the national sphere, passing through micro and medium implementation of government actions and not only through major federative decisions.

This is what INEE is searching for, a collaborative federalism that directs its vision towards each state's reality and redesigns the way of thinking on public-education policies —listening to those who live them, promoting self-diagnosis, and encouraging the construction of their own plan in order to contribute to the achievement of the country's major objectives. This is the federalism which has been put into action by INEE in the last three years.

In face of this challenge, and as part of the primary tasks of the Institute, an initial path—which is central to our advancement towards a true federalist practice—has been drawn within the construction of the National Educational Evaluation Policy (Spanish acronym: pNEE). The design of the 32 State Educational Evaluation and Improvement Programs (Spanish acronym: PEEME) and the Medium-Term Program of the National Educational Evaluation System (Spanish acronym: pmp SNEE) 2016-2020 is an example of this work.

These actions are accompanied by cross-cutting projects in order to generate an active participation in each entity allowing us to build from the local to the national stage, as well as permitting us to study and fortify the regional spaces of the federation which are shared by the states. The objective is not just to “take state realities into consideration,” but to open clear processes for entities to identify and prioritize their context by building their own educational evaluation and improvement projects.

It is important to highlight that federalism and decentralization are a worldwide reference of change regarding educational management. And though these are concepts that have been present in political discourse and educational activity in the country, their presence has not been reflect-

FROM THE DESK

ed in successful achievements despite the progresses shown—which are undoubtedly present. The persistent problems of unequal educational results between federal entities, and of resource distribution, are still there. Furthermore, autonomy in educational decision-making within local areas is still seriously limited.

This is why the sixth edition of the *Gazette*, which marks its second anniversary, is aimed towards the analysis of these concepts, pointing to the investigation of the role played by local actors, and on the way to understanding the perspective of national and international experts on the subject of evaluation as an instrument for the construction of federalism and educational improvement. This issue recounts our history—after three years of autonomy and the creation of the SNEE, the 32 results which can be read here are witnesses to an evaluation policy which includes the crucial local expression by way of the PEEMES.

We welcome you readers into the pages of this publication, which includes experiences from Brazil, South Africa, Argentina, Ecuador, and the United States. And in celebration of the new publishing period we enter, we dedicate a special report to multi-grade schooling, a crucial subject in the local and federal education agenda. This edition also includes the activities of the SNEE and all educational actors who represent—within this collective body—the labor of hundreds of thousands of teachers, administrators, supervisors, and managers working to enable the exercise of the right to equitable and quality education.

We hope this *Gazette* proves to be—once again—a useful space for dialogue and reflection. ☺

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That Which Endures:
Two Declarations

In this trending-topic reader world, where #Hashtags communicate more than a whole paragraph, the *Gazette* joins the virtual though it still has a preference for paper; the same paper where, along history, great narrators have written in—the one which helped, in different formats and sizes, so that news could reach our houses in the form of newspapers and magazines. That same paper of those notebooks where we learned to write in our school years.

Now, the *Gazette* is posted and uploaded to the web, it becomes Tweet and cloud—but it also materializes for those who haven't yet given up paper and decide to read on it.

So, it turns into a journal, a notepad, and a route map, to witness the evolution of the National Educational Evaluation System.

And, thus, it transforms itself into blog to safeguard all of its editions and receive its readers' comments at: <http://www.inee.edu.mx/index.php/blog-de-la-gaceta/>.

So, on paper, the *Gazette* declares, just as Doris Lessing—English writer born in Iran, Nobel Prize for Literature, 2007—said, “we haven't given in” —because we have more readers now, and they are also more demanding, they communicate more with us:

There are a few of us around in the world, we rely on each other even though we don't know each other's names. But we rely on each other all the time. We are a team, we're the ones who haven't given in, who'll go on fighting. I tell you, Anna [...]"

“The Golden Notebook”, Doris Lessing (1919-2013)

We don't give in because, as we declared two years ago, we believe *It Is Possible to Fly*:¹

[...] when Totonac People decide it is time to teach the children of their community to fly, they go out dressed in white and plunge into the jungle seeking for the best tree. They dance in front of the wisest elders and listen to the drum and flute music, asking the Earth's permission to



cut the tree and get out of its interior the same fortitude they have as a respected, surviving, and millenary group. With that communal strength, once the tree log is clean they pull it 15 meters or more along the path and then they sing for kilometers while laughing—they will build a school for flying children; together, they will rise the log inserting it into the Earth again; then, together with the children, they will wear colors and will place a drum at the tip of the log on top of which the teacher will dance before his students release the strings attached to their legs and spin around the sun, without fear.

Such an endeavor is only possible when communication, respect, union, and faith in a common goal exist—learning. Such is the reason for the existence of this *National Educational Evaluation Policy Gazette in México*—getting to know those experiences that make us strong, traveling together along paths leading to what we want as a country.

Today, two years after that edition, we still move on and repeat what was said back then:

Welcome to our pages, which are yours.

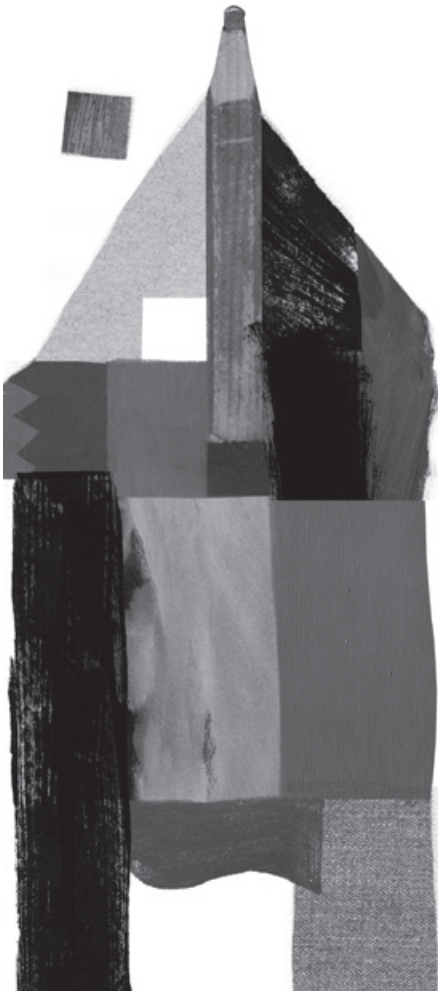
May you find here elements to build on solid ground. ☺

¹ INEE. *De puño y letra. Gaceta de la Política Nacional de Evaluación Educativa* No. 0. (October 2014-January 2015), p. 5

THE SPECIAL GUEST

Senseless “Evaluationism”: The Danger of Making Differences Official

In an interview, **Emilio Tenti Fanfani**, professor at the University of Buenos Aires, explains why “in federal countries it is required to articulate local and territorial interests with the national concerns.” In a parallel way, he warns: “Any State evaluation can have important social effects, by producing official rankings and establishing differences.”



Working in a Federalist Way: Specificities & Components

Emilio Tenti Fanfani has been a professor and a meticulous analyst of the educational reality for more than three decades. During a phone conversation, he tackles the motivations, the ways, and the usages of evaluations in Latin America, with an emphasis in Mexico and Argentina. Initially, he analyzes the political-administrative structure and its various components:

“From the point of view of public policies, a balance is never attained between the division of labor, the construction and execution of public policies, and the decisional structure in countries such as Argentina, Mexico, and Brazil. The consolidation of their systems implies decisions that are made at the national, state, and even municipal levels.

“In federal countries, it is necessary to articulate local and territorial interests with the national interest, which supposes a permanent negotiation. This is the reason why there is always an unstable balance in this labor division. In Argentina, there are coordination mechanisms; for instance, you have a Federal Educational Council formed by all the Ministers of Education in the 24 provinces, and presided by the National Minister of Education. Federalism requires dialogue, negotiation, and, therefore, reciprocal concessions by the parties involved. This is a rich decisional structure, very complex, which needs a permanent political effort for dialogue, democratic deliberation in the creation of alliances, consensus building, and respecting collectively-taken decisions.

“Specifically, a national learnings-evaluation policy needs agreements about the objectives that production of information on the state of development of learnings in all of the territory entails, in order to compare its internal differences from a global and national point of view, seeing the State as an analysis unit. At the same time, we have to contemplate specific interests, the particularities that territorial components have at a state or regional level.”

The Main Challenges to Achieve It — Working Together

Tenti, a specialist in education, graduated from Political and Social Sciences at the National University of Cuyo, and holder of a

Diplôme Supérieur d’Etudes et Recherches Politiques by the Fondation Nationale des Sciences Politiques, in Paris, breaks down the challenges of this federalism and puts into balance the weights that must be equilibrated in a federalist relationship:

“First, there has to be a national consensus about the meaning of evaluations, not only about learnings, but also about evaluation of policies. When you talk about evaluation, you are enunciating a generic mechanism. We human beings tend to value what we do. This means we formulate projects, objectives, strategies; then, questions arise—to what point have we achieved these objectives? Why haven’t we? Which factors are contributing to the achievement of these objectives? Which factors have made it more difficult?

“The meaning of evaluation could be oriented towards decision-making or the correction of public policies to guarantee the achievement of national objectives; it could also be carried out in terms of the interest of administrative control; or with punitive ends, that is to say, evaluate in order to sanction and to distribute prizes and punishments. In the face of this catalogue of possibilities, the real meanings of evaluation have to be discussed comprehensively to establish a consensus among actors at the national, regional, and state levels. Once this is done, everybody will share the meaning of the evaluation processes.

“It is necessary to make national objectives compatible with specific autonomies. Therefore, it must be clear that autonomy must not affect general achievements or objectives. I mean, some evaluation objectives—like the instruments and areas that are being evaluated—can be specific to each state without affecting the achievement of collectively-defined national objectives. Local evaluations and the evaluation of the national educational system should be compatible”.

Looking Beyond Latin America

The member of the Argentinean National Research System—who has been a professor and researcher in institutions in Colombia, Mexico, France, and Argentina—ponders on the importance of analyzing foreign experiences and on the risk of a thoughtless localization of successful models:

“Looking outside can be inspiring. We have to observe what’s happening beyond the region, but we must avoid the cheap

formula of politics that goes: ‘Let’s do it like in Korea, like in Chile, like in Brazil’, which is a temptation. For instance, in Argentina there’s always someone who says: ‘Let’s do it like in Finland’, or ‘let’s do it like the Koreans’. But things that work in Finland, or in Chile, don’t work in Korea. The mechanisms, the institutions, the educational policy, the system, or the evaluation model can work in Japan but not in Belgium, or France. We have to analyze what is being measured and how it is being measured.

“Another issue is defining how often evaluations are carried out. For instance, the former Argentinian government had established evaluations on language and mathematics were going to be carried out every three years, because modifications in average school performance are slow to happen—if they actually occur. Now, the current government has decided to carry out assessments every year. It could be argued why spend so much doing annual census assessments of all the boys and girls in the last year of primary school and in the last year of middle school? This is a very expensive operation and resources are always scarce. If the average changed a lot in the short term, it would be very suspicious. And if it doesn’t change the operation is useless.

“Then, to analyze what other countries are doing is useful to see the advantages and inconveniences of the mechanisms, but it is indispensable to bear in mind that each national society has its own history and its specificities, and that evaluation mechanisms and public policies can’t be transferred integrally from one context to the other. You can’t plant out a tropical plant into a subtropical or temperate climate without there being inconveniences. We have to avoid uncritical imitation.”

Evaluation in the Face of Resistances

Tenti Fanfani, who has been a consultant for the United Nations Children’s Fund (UNICEF) Argentina and the International Institute for Educational Planning (IIEP), UNESCO for Latin America, speaks about the resistances to evaluation and the paths to reaching agreements:

“Concerning the meaning of evaluations, there are a few tendencies. One of them is to refuse to measure how youngsters reach certain learning objectives. In most of the world, union leaders have always been opposed to quality evaluations for education. Why? Because they sense, and with

good reason, that the school system has had the capacity to develop schooling, to integrate youngsters into the school system and to distribute titles, certificates, and diplomas, but it hasn’t had the same efficacy to develop knowledges. I mean, when systems are made massive, a distance appears between diplomas and what their recipients have integrated and are capable of doing.

“This distance responds to very complex factors—which pointing out is not enough but need to be explained (which is not possible to do in this analysis)—that cause society to become suspicious of both diplomas and the school system. This has been a distinctive feature in Latin America for the last few five-year-periods. Before, school was an institution free of any suspicion. If there was school failure, no one thought about blaming the institution, the teachers, or the teaching method; in general, it was explained by deficiencies of students themselves. But when the system becomes massive and a great distance appears between diplomas and the capabilities, or skills, of its recipients, the idea is introduced that school needs to be examined. In part, we are all guilty. For instance, the educational system is impoverished when many families and students are content merely with a diploma.

“Of course, this generates resistances. In Mexico and in Argentina this is a very conflictive issue, and we have to be very careful in its treatment. But I can’t imagine an educational quality evaluation scheme without the consensus of those organizations representing educational workers. It’s very difficult to impose it against the will of those who play the role of representing the teachers’ collective. This makes it conflictive enough.”

“Then, the first thing is to make a deal of sorts with the representative forces of educational workers to agree on why, when, and what to evaluate at the national level, what to do with federal evaluations, and how to integrate territorial interests in order to harmonize local ones with international ones, among other points.

“A political labor is required that achieves fundamental consensus. Without that, the operations and the information produced will be of very low-quality, they won’t be useful and will generate many economic and political costs. Much debate work is needed. In Argentina, for instance, there is no consensus about this question.

“Within this panorama, I get the impression that there are two fundamentalisms at work. On the one hand, the naive belief that evaluating is almost equal to solving the problems; on the other, the lack of trust in evaluation. We have to look for more sensible positions, and make efforts in persuasion.

“We have to be careful with the effects of evaluation too. As Olac Fuentes Molinar, the Mexican education specialist, ‘In any institution everybody knows there are excellent teachers, regular ones, good ones, and bad ones; but to rate and to label—institutionally—a teacher as bad, that’s a different thing.’

“On this issue, we have to be very careful when differences that exist in reality are made official—because they are reinforced and generate a ‘double existence,’ as an objective fact and as a social construct. The same happens with poverty: You can be poor, or you can be poor with a ‘poverty certificate’ endorsed by the State, as it was done in the 19th and early 20th centuries. It’s necessary to be careful with the institutionalized ratings and hierarchies that State evaluation produces.

“Every evaluation has an important sociological effect that sets these differences. If one makes them official, it can be harmful from a social point of view. Let’s assume there’s a professor rated with a ten, another one with an eight, and yet another one with a six, and let’s assume they all have a certificate which the State—with its official power—has granted them. That certificate sets their rating.”

Evaluations by Scopes of Action

As for the scopes of the evaluation, that can go as far as the teacher’s figure being the evaluator of his or her group to establish starting points in the teaching-learning process. Tenti explains:

“The State has to evaluate the educational systems as a whole in order to allocate resources and establish policies: The development of learnings in big aggregates, groups of students, the national total of students, and the territories that compose it. In this way, the State evaluates and is the user of the data produced by evaluations. But we have to avoid mixing things and having teachers becoming the users of that information.

“For instance, the teacher, a good education professional, should be capable—at the beginning of the school year—of saying: ‘I

am a fourth-grade teacher and I have to be able to apply a test to my students in order to know the state of their linguistic-skills development. In what shape are my students? What are their problems? As a teacher, I should be able to do that diagnosis, read it, and use it to deploy an educational strategy according to the particularities of my students in that cycle. Given that the professor has always been an evaluator, to believe that he is a user—and not an evaluation producer—in the classroom is to downplay and disavow his or her professional capabilities and skills.

The evaluation should be a resource, a technique the teacher must be capable of applying. The evaluations the State carries out are for the formulation of public policies and, in that sense, they entail more than census operations—what is needed are operational representative samples. To know if students from Nuevo León are learning more math than those in Oaxaca you don't need a census, you need a representative sample.

A Message for Decision-Makers

Reluctant to give advice, the researcher sketches out suggestions he would give “to a council, a minister, or someone with the power to decide an evaluation policy”:

“I would tell him or her that before launching the evaluation, she has to be clear about what she wants to evaluate for. Because an evaluation produces information, but not of any kind. First of all, it's official information that has descriptive and prescriptive effects; I mean, it has the relative capacity to make real that which it's describing. Second, it has labelling effects (it classifies, orders, and ranks); it says, in an official way—that is to say, in a public and authorized way—who are the best and who are the worst.

“I would add the need to think in depth about the implications of that information; what does that information mean? What use will be made of it? I mean, what is it for? There has to be clarity on this in order to convince everyone—and there are many—involved in this process, among them teachers, officials, regional and state-level ministers, specialists, technicians, parents, and the mass media.

“If there's no clarity, the necessary consensus for the operation to be successful will not be achieved. This is indispensable in order to know what to evaluate, what the effects will be, and how those effects which

turn out to be ‘perverse’ will be controlled. We mustn't forget that evaluation is good intended but can generate unpredicted negative consequences. It's necessary to be prudent on these issues, because an evaluation has a big social impact.

“In this sense, you don't have to evaluate like it's a fashion or a mandate, nor as if it were some kind of bias. Because some believe problems are solved by evaluating everything, all the time. For a certain Western political sphere, evaluation is the new mechanism of governance and control. We are going from a ‘Educator State’ to a ‘Evaluator State.’ To think about the ‘whys’ may be useful to avoid an evaluating frenzy that may end up being senseless.

The Moment of Truth

Tenti Fanfani finalizes the conversation by explaining he is not “an evaluation expert,” but “a sociologist interested in the articulations between the school system and the social world in its diverse dimensions,” which is the reason why he sees that issue “as a contemporary movement of educational policy that has its socio-historical explanations.” And he contextualizes this activity:

“It wasn't by chance that Europe began evaluating in the 1970's, when the system reached a certain massive dimension and evaluations appeared as the ‘quality’, indicator for the school system.

“In my conferences I often repeat that the emergence of evaluation mechanisms for the quality of education is an indicator that the school system has stopped being infallible. And that in Latin America, as in the whole world, it's easier to provide schooling, develop schooling, found schools, appoint teachers, and distribute diplomas and certificates than to develop people's knowledge.

“Now comes the moment of truth, because you can't build a more democratic, rich and just society without developing a common base of powerful knowledge for all people. Even if for that we have to acknowledge that this is much more difficult than to simply provide schooling.” ☺

Interview: Magdalena Alpizar



Would you like to listen to the interview with Emilio Tenti Fanfani? Watch the video at the Gazette's micro-site at: <http://www.inee.edu.mx/index.php/blog-de-la-gaceta/>

THE SPECIAL GUEST

South Africa: The Need for a Way to Interact with Provincial Governments

“It's important to know how many students are in school, but also how many are learning and how they are learning,” says **Servaas van der Berg**, professor of Economics at the University of Stellenbosch in South Africa, and he assures us that, “As is often the case, the provincial governments don't know why policies are implemented, so either they incorporate them in their own fashion, or they dismiss them”.

During the symposium “Key Topics for Basic Education Evaluation. Dialogues with the International Educational Academy”, organized by the National Institute for Educational Evaluation (Spanish acronym: INEE) and the Educational Research Department of the Center of Research and Advanced Studies of the National Polytechnic Institute (Spanish acronym: die-Cinvestav), in September, 2016, the Gazette had a conversation with Servaas van der Berg, who holds the South African Chair of Research on Socio-economic Policy at the University of Stellenbosch and has played a key role in the macro-economic strategy of that country, including a grant support system for more than 10 million children, and an annual educational evaluation. The following analyses come from the dialogue that connected his insights on Mexico and South Africa.

How to Identify a Developing Country?

From the information of the Program for International Student Assessment (PISA) of the Organization for Economic Cooperation and Development, Mexico is close to the developing countries, which have a low proportion of children and 15-year-old youngsters in middle school, like Turkey. That's one of the characteristics of this kind of nation —many people are outside the educational mainstream system. They may have access to education at some point, but they leave school before the age of 15, or fail so repeatedly that they don't make it to senior high school.

In my home country, South Africa, this phenomenon is very similar, and the same happens in Namibia, a neighboring country in which I also work.

Another situation in common is that there are great educational differences between cities and rural areas, because it's difficult to bring good teachers to remote areas, so parents can't see the benefits of education (having an educated child often means to be restricted from local jobs) and many people don't see the necessity of access to education.

Of course, in Mexico City we can find features similar to those of the educational systems of developed countries, but the level changes in rural areas.

In South Africa we have a great number of multi-grade schools. These spaces generate a lot of difficulties for teachers, particularly when the variety in terms of students' quality is high.

Language is another great issue. In South Africa we have approximately 40 different languages.

Most children in South Africa study the first grades in their native tongue, but in some cities there are not enough speakers of those tongues, so it becomes necessary to use different languages within a single group. By fourth grade, most of the South African languages transfer to learning in English. But at that level students should already be reading, and by changing the teaching language, their reading ability diminishes. This is a problem in most developing countries where the official language is not the language spoken in many communities.

To extend a little on the topic of the implications of this issue, I must say that in Namibia, and in some South African regions, there is a great number of small communi-

ties. It is very complicated to find teachers who can, first, get there, and then, teach in all the different languages. It's almost impossible to have the right staff in the right schools, and with the right language. For example, a teacher in mathematics might be needed, but the one available doesn't speak the language of the region.

What Are the Extremes in a Developing Country?

To a great extent, poverty and education are part of the same issue for developing countries. More than anything else, we need to grow. Where there is no growth it's impossible to create enough jobs or face immigration problems. All these factors depend on internal growth.

Mexico is a country with medium and high incomes; it's not in the same position as India, Afghanistan, Mozambique, or Ecuador. However, a good part of the country has an education similar to that of a poor nation. Dealing with that is going to become an epic problem. It's difficult for me to state my opinion; I'm a stranger here, but it would seem to me that, if you want to integrate the poorest population into modernity, reducing gaps in terms of rural education must be a priority in the agenda. In the end, the growth of a country needs educational quality.

The fact is that, if a great percentage of the population is poorly educated, as in my country, it will be a lot more difficult to enter into a path of economic growth.

What Happens to Educational Reforms in Developing Countries?

Mexico has improved the dynamics of its educational system; but that, of course, does not confirm that educational quality has improved. This seems to be still pending.

What we see now in Mexico in terms of policies related to its educational structure, in South Africa we have had several attempts of that kind. We want a system that yields better educational results, but the South African Educational System can't work well, with the exception of the one for the middle classes. Specifically, teachers are not in a disposition to join in the reform.

We abolished the most recent attempt at educational reform. It was too expensive, it entailed innumerable changes to the system, and the latter wasn't able to progress. So, eventually, we decided to change and start again. That meant a loss of years.



Because of that, I think we must be careful about those experiments that influence the forms of teaching; they are dangerous because teachers will be less apt to teach the new methods, and the government will discover that it needs a huge effort to train them in the use of methodologies that can fail. The lesson from that experience is that it is necessary to begin changes from the initial formation—or the first years of formation—of teachers, and wait for the results of those modifications before implementing a reform.

When I say that radical changes are potentially dangerous, I mean that they are so for the educational system. In a process of such vast proportions as a reform, the teachers are frequently confused because they can't handle new forms of teaching and they can't use their usual strategies. Therefore, they impart a very poor teaching and the children suffer because the system doesn't work.

I say this because, in our case, the reforms concerning teaching methods haven't been very successful.

We have also made reforms concerning evaluation, which has caused trouble with teachers' organizations. In fact, we had a similar phenomenon to the one happening now in Mexico. In that instance, I was in favor of teachers' assessment, but the implementation wasn't good. It seemed to have a punitive character. You have to be very careful with those kinds of decisions.

Finding reforms that place teachers in the right spaces is very difficult. I have done work in Namibia to investigate subsidies for rural teachers, because it is a very big country with only two million inhabitants. Given that population is widely scattered, it is very difficult to get children to school.

As I said, we need schools in rural areas. But it is very complicated to place qualified teachers in those regions.

The Biggest Challenges of the South African Educational System

South Africa has made great progress in getting children to school; but, like the majority of developing countries, school quality is weak. Around 60% of children arrive to middle school with great difficulty, and only 14% move on to the next level. Finally, the proportion that attends university is minimal.

Then, against our need to offer better skills to our students, schools do not deliver quality. Besides, in many schools there are

no teachers of specialized subject-matters, and in many schools Mathematics is not taught because there are no teachers. This also happens with Physics and other subject-matters, and it causes many good students to lack the proficiencies to become accountants or engineers, or to even realize such options exist.

What's interesting is that even during the times of Apartheid, the system invested a lot on bringing in qualified people, but the educational quality didn't improve. Today we no longer have the racist system which operated in that period, but there are still remnants of it. For example, a school was considered "good" when, historically, it had been for white people. Now we're going to include people from other groups. But the reality is that weak schools are, for the most part, excluded from quality education, and they still largely serve the black population.

Although this panorama diminishes at the higher level, where population has mixed and works well, that's not representative of the national situation.

The South African Evaluation

In our quest for educational quality, in South Africa we are trying to evaluate from the earliest to the highest grades of basic education. The only assessment we had was for twelfth-grade students, who took part in an assessment which was massive in terms of quantity, but it lacked precedents because there were no previous individual assessments. When we had this program, the government started to evaluate first grade, second grade, third, fourth, fifth, sixth and ninth in terms of Mathematics and Language. There were issues related to the calibration of the evaluation, and all local variations face that problem, but at least you could see which schools had been strengthened after trying to intervene in an empathic fashion. We no longer have that. But we expect to return to the fight with new strategies.

Other challenges in terms of evaluation are related to language. Aside from the fact that we don't have enough textbooks for all African languages, there is very little literature written in them. Many of the children in rural areas were not exposed to any kind of reading. There is literature in English, but we are trying to develop textbooks in different languages for the earliest grades. After that, we do want to start to teach them to read in English.

Many parents who wish their children learn to speak and write in English try to send them—from the earliest grades—to schools where that language is taught (historically, for whites or authorities). Obviously, not everybody can do that.

But when children try to speak with others there, or even among them when they play, they assume they have to do it in English, and that's not so. They don't acquire the benefits of the experience in English, they are not fully immersed in the language.

The Relations Between Central and Provincial Governments

As in Mexico, in South Africa we have a centralized educational system, although not so federal as it is here. In theory, public policies are made at the national level and the implementation is provincial, but many solutions are not well thought through and, therefore, they are not understood alike in the center and in the provinces.

As happens often, provincial governments don't know why policies are implemented, so they either incorporate them in their own fashion, or they dismiss them. This happens because there is limited capacity. At the national level there are officials with enough training to interpret data and analyze how the system is working, but at the provincial level these capacities are limited, they have no information, they don't use national statistics, or they lack measurements of their own. We need a way to interact with the provincial governments, and in some sense, to involve them in the process. This is a great challenge.

The federal government does meet regularly with provincial governments, generally to discuss technical issues, but there are not enough meetings to discuss or direct public policy. We have a conference in which officials of the provinces participate, and a national research conference, but we need something different. We want to build capacities in the provinces so the people who are in charge understand these policies, but that entails a long process. From the research perspective we can do very little, but something needs to be done because those local situations affect the nation.

A proof is that in South Africa we have very weak systems of police services, water, housing, education, and health. We are still struggling to obtain these capacities and to succeed in making the personnel that par-

ticipates in all these policies capable of doing what they do well. All of this effort is related to education.

At country level, we have the National Development Plan, that focuses on policy. It's not very quantitative, which I think is good. The most important thing is not to say we are going to produce a certain number of graduates, for example, but putting the right guidelines in place.

It Is Crucial to Evaluate the Educational System

I find INEE's evaluation in Mexico extremely relevant, because when you evaluate the system you have to look inside and outside schools at children's cognitive levels. This is a kind of evaluation that developed countries have rarely done. This affirmation is reflected in public policies. It's very common to find one policy aiming to get everybody to school and another one to deal with those who remain outside school. Both efforts should be integrated.

For example, we have very high dropout rates with students around 14 and 15 years old. This means we need more early interventions, but all of it goes back to the necessity of knowing, understanding, and assessing how the system operates.

This is why I think that evaluating the system requires a holistic view, both quantitatively and qualitatively. It is important to know how many students are in school, but also how many are learning and in what way—how much learning is taking place through the years.

If the problem is serious, for example, if most fourth-grade children are not getting an adequate learning, what happens is a loss of resources, people, and opportunities. That needs to change. €

Interview: Laura Athié



Get to know all the papers in the symposium "Key Topics on the Evaluation of Basic Education. Dialogues with the International Education Academy": <https://goo.gl/91uPNt>



"Quality Education in Developing Countries: What We Learn from International Educational Evaluations?", video of the conference by Servaas van der Berg during the symposium: https://www.youtube.com/watch?v=R-FMMn7_XOLE

VOICES FROM THE CONFERENCE

OUR VOICE

Generating Information Systems for True Federalism

In an interview, **Teresa Bracho**, a member of INEE's Board of Governors, affirms that evaluation must be part of the natural educational assets, "just like chalk and textbooks were in their time. It must be demanded, required, people should identify it as basic for day-to-day work in schools, local administrations, and in the federal administration."

TERESA BRACHO

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The Paradox: Federalism with a Recentralizing Direction

The idea of educational federalism emerged from federalism at the end of the past century. During the 20th century, there were movements from municipalization to hyper-centralization, because growth in demand was mainly federal. But it was until the end of the past century that steps were taken towards decentralization, or educational federalism.

This is interesting because (as analyzed by Alberto Arnaut) the term "federalism" had different meanings throughout that century. In the first half of it, federalism meant centralization—contrary to municipalization—and consisted basically in "incorporating the federation". However, by the end of the century, it meant a return of system administration to the states.

Why was the term federalism used at the end of the century? Because Mexico's centralizing movement was strongly blocked by the National Union for Education Workers (Spanish acronym: SNTE). What federalism achieved was to return the system's administration to individual states, it gave them back what the Secretariat of Public Education (Spanish acronym: SEP) used to control. Although the logic was to divide the union's

organization among all the states, as a federation of clusters, the single national union abided. And here we are today, with this concept of federalism in which states have control over the system's operation.

There are those who say there is a recentralizing movement. This is not the case, what was decentralized is still decentralized—all that was transferred to the entities remains there. What occurs is that there is somewhat more control over resources and wages. What was previously transferred by way of the Support Fund for Basic Education (Spanish acronym: FAEB) is now controlled by the Contribution Fund for Education Wages and Operation Expenses (Spanish acronym: FONE). This has helped to recover information that was lacking in the center. There is a return of control with the FONE, because it is not directly administrated by the states.

For many, this new Educational Reform has meant recentralization, because national-level regulations have been created, such as the Professional Teaching Service Law (Spanish acronym: SPD) and the Law of the National Institute for Educational Evaluation (Spanish acronym: LINEE). When the INEE was created, it adopted the duties of SEP regarding the evaluation of the national



educational system, and the duties of authorities of the federal entities related to evaluation were obscured. This is why, for many, the SPD and the LINEE outline a centralizing movement.

Federalism Makes Sense

At INEE, we believe federalism makes sense for a margin of autonomy within the educational systems of the entities to exist. Nobody would want to recentralize what has been decentralized. For instance, teachers in the mountain range of Oaxaca or Chiuhuahua who had not received their payment had to come to SEP to solve the problem. It would be absurd to return to that.

What can be done, however, is regenerating information systems with respect to what is happening in the entities—how teachers are doing, the state of schools and what their students are like, etc. All of this should be reflected in the Educational Management Information System (Spanish acronym: SIGED), which is still not one hundred percent; but that is the direction in which we must be headed. It is not possible that the system does not include information about the number of students and teachers, or the conditions of schools, and so on. How do we administrate and design public policy without information?

For example, the census carried out at the beginning of the term of office would not have been necessary if the system's information recovery were a day-to-day activity. So, this movement to gain more information does not necessarily imply recentralizing or regaining control. It is about having information on what is happening in order to make decisions in education policy.

The general position of INEE's Board of Directors is to let the states have more freedom in terms of selecting what should be added to, or what is needed from evaluations. We think national evaluations should be strengthened in this sense, and I believe states should participate more proactively in their required information proposals.

Part of the unforeseen changes in the Reform is that many evaluation departments were obscured or erased, they were absorbed into the SPD, or they simply said: "If we have the INEE, why do I have an evaluation department?" This presented a problem, because the importance of maintaining their own evaluation systems was not clear for local authorities. This was a problem of communication with

INEE, as we have not come to replace anybody but to reinforce them, to solidify them. They do not have to be dedicated solely to the application of national evaluations.

Here, there was a problem of softening local evaluation capacities. I believe that now INEE is attempting to correct this interpretation.

Bringing Capacities Together

Now there is a National Educational Evaluation System (Spanish acronym: SNEE) that combines the capacities of everyone. For example, this movement promoted by INEE's Education Regulation and Policy Unit (Spanish acronym: UNPE) for thinking about the SNEE as an authentic evaluation *system* represents an acknowledgment of the needs of the state educational systems and the need to making them stronger from within the Institute. Without this, who will propose the way in which the evaluation will be used? Who will identify the areas that require additional information besides the national information?

Therefore, there must be a capacity to make decisions of this nature—one, to perform different evaluations; and, two, to offer entities the capacity to appropriate their own policies as well as their results in national evaluations. It is very important that they are strengthened.

Evaluation is not only the application of instruments. It includes decision making to indicate those areas that need information, what needs to be evaluated, why and what the evaluation is needed for, how it will be used, and the ability to interpret the results within their contexts, and also to benefit from them. Without this, national evaluations make no sense.

This capacity for information appropriation—to complement different needs and capacities—is what I would call evaluation federalism. Let's look at an example: The Educational Evaluation and Improvement Project for Multi-Grade Schools, which developed from the different states within the framework of the Regional Meetings and the National Educational Evaluation Policy (Spanish acronym: PNEE) on which entities have worked for several months. By recognizing its importance, we have aimed to implement it from the center because we have the capacity needed to promote it. The SNEE can detonate it as a national project, but it comes from the entities, with the pe-

culiarities they have observed and which we look at from the center. It arises with the consolidation of the SNEE; the movement which strengthens entities in order for them to build and use the information constitutes the consolidation of the SNEE.

Evaluation Is Not Merely Instrument Application

We have a current path, into which the Institute directed great support, and it is a good thing it was done in this way at that point in history, but the hardest thing is to make individuals see this evaluation not as an isolated instrument, but as an assembly that produces relevant information; from deciding what knowledge evaluation tools I need, what I want them for, how I am going to use them, what evaluations will be applied, and how they will affect the quality of education.

This is why the Educational Evaluation and Improvement Programs (Spanish acronym: PEEME) are a great area of opportunity; because this is not merely about an evaluation department making decisions, it also demands the participation of the entire administrative framework—the Secretariat, the secondary higher education department, the elementary department, the syllabus department, etc., in order to think of the kind of information needed.

This is one of the most important triggers, because the PEEME construction did not only involve evaluation departments, but also substantial operational departments. Hence, the identification of information needs, the way this is used, and the suggestions for improvement. If this is put in place, it will represent a great step towards a comprehensive strengthening of state education secretariats.

The essence of evaluation is to generate information that helps in the assessment of what there is and what needs to be done. The consolidation of the SNEE and the execution of the PEEME can be a firm step towards strengthening federalization, because the system goes straight to the essence of evaluation, allowing it to develop within the entities and also from the center.

When observing the construction of the PEEMES, we can see that they mobilize, and that is excellent. The result of the Multi-Grade Project is a perfect example within the group of entities.

Evaluation: Part of the Natural Assets

I am confident that, by 2020, evaluation will be part of education's natural assets, just like chalk and text books were in their time, that it will be demanded, that it will be seen in its substantial role in day-to-day work in schools, and in local and federal administrations.

The movement unleashed by the PEEMES is related to decision-making. This means that a value is assigned to the evaluation result in order to decide on something. If it has been installed by 2020, one day people will say: "This is an instrument that helps me decide how to organize the work of the Technical Board, or to decide on the orientation of math teachers, or even to decide how to assign available resources, etc." When these decisions are the result of information, when we make informed decisions, we will have taken a great leap.

I believe it is possible to have a movement that guides us on what to do with the results of the evaluation, which identifies what can be expected from the evaluation, what is beyond its scope, etc. If this is done, it will be a great INEE achievement aimed at improving education.

In this sense, I would like to see a more fluid dialog, a more cemented coordination of the relationship between the INEE and the state and federal authorities, as it helps improve relations between them.

INEE can be mediator between the center and the entities, and then we can say: "It can be done like this," "this dialog is possible," "we can all be recognized as an authority and it is better for all of us to move forward together." This is possibly one of the secondary roles of the Institute.

Transference of coordination can be important for the Institute. It is not a simple task to coordinate with the central and state authorities at the same time. In fact, before INEE's autonomy, I had not had this kind of relationship with state education secretariats or with the federal authority.

Lessons Learned

I think coordination is the aspect that has been hardest to establish, even within the Institute. We have moved from thinking of autonomy as autism—consciously separated from reality—to the acknowledgment that autonomy within INEE means being able to relate equally with the other actors in the educational system.

The Institute has a lot to learn about what is going on in the states, and sometimes it can fail to perceive local realities. To

learn from them is a challenge, because we are used to seeing only numbers. We have to learn how to come closer to these realities. Our evaluations still reflect this learning challenge; hopefully, PEEMES will help us in this. We need to learn to listen. Arrogance is never a good companion to knowledge.

Finally, I would like to add a personal concern; we always say that changes in education are long term, but we need to learn to imagine how to mobilize the system in a clearer and more directed manner. In my opinion, this will result from achieving three things:

- 1) The evaluation is given its intended use; 2) The information is guaranteed for guidance in decision-making, and; 3) This change takes place sooner rather than later. €

Interview: Laura Athié



Would you like to learn more? Read: *The challenge of using the information produced by Mexico's educational evaluations*, an article by Teresa Bracho, in the *Gazette* No. 2 (July–October 2015), at: <http://www.inee.edu.mx/index.php/blog-de-la-gaceta/>

VOICES FROM THE CONFERENCE

OUR VOICE

Reconceptualization of Federalism: Innovating from Tradition

Derived from an interview, the concepts the author refers to stem from an intent. "If we manage to get the states' concurring preoccupations to transform into a national project with shared components, then each state will decide on which it has to work." She adds that the path to educational federalism can lead to the creation of "communicating vessels between entities" and allow us to "learn to establish a dialogue with accurate indicators."

MARGARITA ZORRILLA FIERRO
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"A little history has never harmed anyone," says Margarita Zorrilla, member of the Governors Board of the National Institute of Educational Evaluation (Spanish acronym: INEE), who has transited—in her experience in evaluation and national education—through academia, state governments, and the federal government. She speaks—from that point of view and her experience—about a federalism that mixes up centrality with autonomy. And she thinks about the Mexico she would like to see.



Federalism has to do with decision capabilities. In the Political Constitution of the United States of Mexico, it is established that we are a Federal Republic and that the nation is shaped by a sum of free and autonomous entities. But "federal" hasn't always meant the same thing in Mexico. In the 1930s, the centralizing meaning of this concept predominated, derived from seeing "federal" as a synonym of the Federal Government. In those years, to federalize teaching meant to centralize it.

Six decades later, in 1992, the reorganization of the educational system was decided, and this was recorded in the National Agreement for the Modernization of Education (Spanish acronym: ANMEB) by way of two components: Decentralization and social participation. But, a little further on, fundamentally because of the influence of the teachers' union, decentralization talk stopped in order to discuss federalization in its decentralizing sense.

The ANMEB is known as the “Deal of the three R’s,” since it has established three major policy lines with the purpose of promoting quality basic education with equity for all: Reorganization of the national educational system, Reformulation of educational contents and materials, and Re-appreciation of the teachers’ function. [...] This meant the definition of a national educational policy which, because of its importance—some analysts say—can be compared to the creation of the SEP in 1921.1

So, we have been using the same term for, at least, two different things. For instance, after the first period of centralizing federalization in some states they spoke of “federalized teachers” to distinguish those who belonged to the Federal Government.

In the moment of the 1990s decentralization, I experienced directly the transition from the university to a state system right when the decision of decentralizing the operation of the educational system was made; we must emphasize that this is what is being decentralized—the operation, the payments, the management of resources, and the possibility for states to build their own projects of educational development. From my experience and assessment, this was extremely important. Several entities took federalization seriously in its decentralizing sense.

It is true that, at the end of the past century, the Federal Government encouraged changes that were not widely adopted by the states. But it is also true that, at the central level, the Federal Government was finding difficulties to establish a dialogue when confronted with the proposals of the states.

Federalists & Centralists

The decentralization of the operation was gradual, and it had effects of various different kinds. The first thing states received were resources to pay through their own methods. Some of the current economic problems of the educational system derive from this gesture—there was a wage negotiation at a national level, and then wage negotiations in the states, which gave way to a “double negotiation.” The 1992 federalization generated the rise of new social and political actors. A link was established—between governors and the union organization—that had diverse political, economic, and educational implications.

Another consequence had to do with educational policy programs. Programs endowed with federal funding have always existed, but there are few with funding from the states. With the progress in decentralization and the creation of different budget funds, the states had less and less possibilities of having access to federal funds. There were exceptional cases like the Quality Schools Program (Spanish acronym: PEC), which was designed by federalists, people who believed in the states and articulated the responsibilities of the actors. Then, instead of the central level deciding what, when, how, and at which cost a program would be implemented, trusteeships were created, people accountable was appointed in the states, and state responsibilities were established.

The 1992 decentralizing federalization decelerated five or six years later. In that sense, even though there was great responsibility in it from the Federal Government and the states themselves, it is not possible to determine only one factor to explain the deceleration in that stage.

Here, it is necessary to quote Gregorio Torres Quintero:

Centralization is not bad in itself; unity in authority is indispensable for it is civilizing in a certain period of peoples’ evolution, as it has been demonstrated over and over in world’s history. Centralization only becomes an obstacle to progress when it tends to depress local initiative once that initiative has become mature, when it is already self-aware, when it feels its own dignity, and when its power is revealed precisely as a happy result and by virtue of good centralization.²

Torres Quintero, who lived from 1866 to 1934, illustrates this debate clearly. His insight is as valid today as it was then.

In a certain way, we can think that recentralization of the National Educational System began to occur because the states were not up to the expectations, particularly in the management of their resources and, consequently, in the commitments they acquired.

PEEMES and the Federalization

INEE Wants

At this moment, educational federalism has to do with the capability of the states to assume complete responsibility for the education of the population within their geography. As it was enunciated at the beginning of this text, Mexico is a federal country and the states’ autonomy is written in the Constitution. This is not open for discussion. What is open for discussion is what happens in reality; that is, the ways in which this feature of our national organization occurs. We have to look at what’s happening. The INEE insists on developing the National Educational Evaluation System (Spanish acronym: SNEE) on the basis of the *Guiding Document for the National Policy of Educational Evaluation* (Spanish acronym: PNEE), in which the need for each state to build its own State Educational Evaluation and Improvement Program is outlined. The idea is to connect, in a pertinent and creative manner, “evaluation” and “improvement.”

In promoting the development of state programs that link up evaluation and improvement, it is necessary for us to go beyond promoting regional work between entities in a way that synergies are generated in the field to enrich the education of boys, girls, and teenagers within the diverse geography of Mexico.

In the same spirit of a legal mandate focused in the entities, one of the promises of the 1993 General Law for Education was that the Secretariat of Public Education (SEP) would see to it that there wouldn’t be any major inequalities between entities. In spite of that, the homogenizing way of thinking—with all its difficulties in accepting diversity—predominated. We haven’t learned how to make decisions in a particular area, we think everything must happen at the national level. A clear sample of it is the following: In order to bring down school dropout rates which predominate in middle school and high school, how can we make State decisions ac-

ceptable and politically correct in all places in the country? That's part of the challenge. Within this panorama, the biggest challenge is the formation of local capabilities. We have to form leaders who know how to develop ideas, transform them into projects, carry them out, and follow up on them.

Communicating Vessels with Accurate References

On the basis of everything above, at INEE we are advocating for a true federalism and that is why this is being openly discussed with the states through various mechanisms, the most important one being the SNEE.

The states are grouped in geographical regions, they show differences. The concerns of Nuevo Leon are not the same as Durango's, nor should they have to be. How do we establish a horizontal dialogue? That's what the Institute is striving for.

For the sake of contextualizing this Dialogues and State Projects Initiative, let's remember that the 2013 Educational Reform granted constitutional autonomy to the Institute, which has maintained the collegiate body of the Council for Relations with Federative Entities (Spanish acronym: CONVIE) and also designs and operates the SNEE's Conference.

We have one ongoing initiative for an Evaluation and Improvement Program for Multi-Grade Primary Schools, in which more than 25 states participate. This shows that if we manage to get the states' concurring preoccupations to transform into a national project with shared components, then each state will decide on which it has to work most within its geography. This is about generating communicating vessels between entities and learning to dialogue with accurate indicators as references.

Therefore, the evaluation promoted by INEE creates referents—results that make gaps visible—and convenes to work in their solution as a national educational system and as a federative entity; that is, it builds federalism.

Two Conceptions of Federalism

Now, in the Regional Meetings there has been talk about what could be the seed of two conceptualizations: "Collaborative federalism" and "federalism as a symmetrical and horizontal integration." It is interesting because federalism includes the center—federalism doesn't mean the center is not pres-

ent—while 'collaborative' means managing to get all the states involved.

In that sense, it is impressive to listen to the conversations held during the PEEMES work in September this year, which strive to put very clear issues on the table. What we have to do, then, is listen to each other and find mechanisms to strengthen ourselves: "I know some things you don't know, and you know some things I ignore, that's what we are here for." Collaboration makes sense in this space because we all don't know the same things, nor in the same way.

From my perspective, the aforementioned is a promising path for this country to develop and take a leap forward through a federalism with these characteristics while developing the substantial parts of the Mexican State, which means its federative entities.

We have to consider that the federation has an asymmetrical relationship with the states, which is why there's talk of the need for a federalism that builds horizontal and symmetrical relationships. In the measure in which we understand and identify the features of diversity we will have advanced a step further. We have to know what diversity means, what are the features of each entity on this issue. That is why the work done with multi-grade within the frame of the PEEME is so important, because it guides us to tend to other issues and levels that don't include regular schools, since they are not in the same conditions.

Within this frame, there is light at the end of the tunnel for federalism in the PEEME. There are several elements available that can help us accomplish permanent labor and dialogue—as much as collaborative labor—even if there is a cultural challenge; on the states, they know what to demand and to whom. A sentence said by Abraham Lincoln comes to mind: "The only way to predict the future is to create it;" or, paraphrasing Václav Havel (1989-1992), hope is not the same as optimism, optimism has to do with the expectation of something turning out all right, and hope is the conviction that something is meaningful.

In particular, I have hope and evidence that things can go better. I think this exercise of the PEEMES has the virtue of placing the decision in the hands of people. What does it mean to empower decision-makers? We have to sit with the people and discuss. The important thing is not taking for granted that, being the authority, you're correct, or that you have

all the elements, be it at the state or central levels.

Undoubtedly, we need to be persistent, since this is something that has to be built slowly. The objective is to make decisions in educational policy based on evidences. That's at the heart of the SNEE and it also implies collaboration and communication. There is no end to that, and it's like a spiral in which, gradually, you pass from one stage to another—a stage will be reached with the PEEMES, and then we will reach another one with SNEE's Medium-Term Program and we'll have more clarity.

The PEEMES will become what we want them to become. And this will happen because planning, goals, and intentions are present.

We have to see things as processes; and, in turn, to see these processes as a network of relationships with people, between different hierarchies, with the past, with the present, with the future, with knowledge. All of these elements count. We, the ones with the longest trajectory, are the ones who have to bring to the present the features of history that we can't afford to lose. The most important teaching is that we have to learn from what's happened, from tradition. We have to acknowledge people, individuals. Federalism can be rebuilt, what is needed is the intent to do so, and a series of leaderships. If we reach agreements as entities, if we work together and bring components together, we'll be more likely to obtain resources from the center.

Another aspect that is starting to become important is information and knowledge. The initiative of giving life to the PNEE and SNEE is marvelous, it must be strengthened so that information is used. We must give it technical attention and be congruent with the findings we have encountered.

The Training of Federalists

Today, we have the Specialty in Politics & Management of Educational Evaluation, in coordination with the Latin American Faculty of Social Sciences (Spanish acronym: FLACSO), Mexico; there are also training programs for educating evaluators, such as the Diploma in Educational Evaluation of INEE-UNAM, in coordination with the National Autonomous University of Mexico, but we need more.

It is fundamental to think about what this training consists of, because programs are

required to form technical staffs in different specialties. For instance, how can the INEE support a program for the induction and training of the new heads of education in the federative entities? That's a priority, because we need to dialogue using the same language.

The Institute has to be much more pertinent and opportune in technical terms. And this implies that there has to be clarity about what the evaluation means, be it at the grand scale or at the scale of the national educational system.

To end, I want to declare that today's evaluation is different, thanks to the National Educational Evaluation System. The states are working on their PEEMES, and INEE offers them knowledge and accompaniment exclusively. The states are the ones which analyze, propose, develop, and apply. That is, they add their realities to outline a realist and diversified federal panorama. We are on our way to achieve the principle of the institute that says: "Evaluation is for improvement." €

Interview: Laura Athié

¹ Source: Zorrilla Fierro, M. and Barba Casillas, B. "A change in Mexican Education. The new role of local governments". Work elaborated for *Jornadas Internacionales: Aportes para la nueva Ley de Educación Nacional*, organized by the Ministry of Education, Science and Technology of Argentina and the International Institute for Educational Planning (Spanish acronym: IIEP UNESCO), regional seat Buenos Aires, on September 14th, 2006. Published in *Sinéctica*, ITE-SO's magazine: <https://goo.gl/Eb70pq>

² "General report relative to the works carried out by the National Congress of Primary Education in its second meeting, held in the Capital of the Republic in the year 1911." Bulletin *Instrucción Pública*, SIPBA's Official Agency, Mexico, XVIII/4-6, September-November, 1911. In: Arnaut Salgado, Alberto. *La federalización educativa en México: historia del debate sobre la centralización educativa, 1889-1994* / Alberto Amaut. Mexico: El Colegio de México, Center for Sociological Studies, 1998.



Know more about the PEEMES:

Visit the microsite of the PNEE in the "Projects" section of the INEE's website: <http://www.inee.edu.mx/index.php/pnee-peeme>



Look for the special supplement for decision-making: "The SNEE and the National Policy for the Evaluation of Education: Progress and Perspectives," at the *Gazette's* blog: <http://www.inee.edu.mx/index.php/blog-de-la-gaceta/>

ROADMAP

PNEE and SNEE: Cooperative Federalism & Local Capabilities

Starting from the historically centralist relationship between the Federation and the entities, this work generates a conceptual frame and an exercise in resignification of the construction and progress of the PNEE and the SNEE to establish new center-local relations. To accomplish that, it describes the actions taken, defines the conceptual coordinates, formulates scopes, and enunciates the main challenges.

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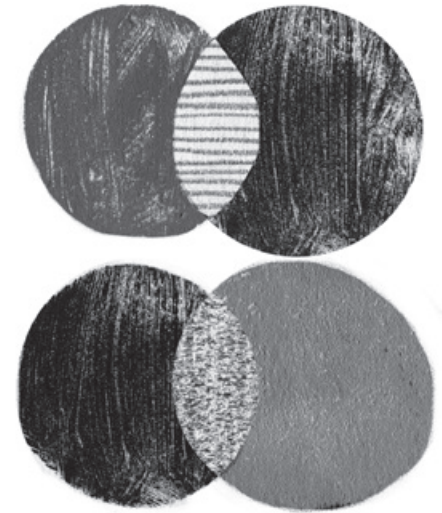
For Sandra, Paco and Camila

Introduction

The recent definition in Mexico of the National Educational Evaluation Policy (Spanish acronym: PNEE) and the efforts derived thereby to promote and articulate evaluative actions of educational authorities (federal and local) and of the National Institute for the Evaluation of Education (Spanish acronym: INEE) within the frame of the National Educational Evaluation System (Spanish acronym: SNEE) has presented us with diverse challenges of technical, political, and institutional coordination order.

These challenges are linked to the historical dual relationship between local educational authorities and the federal one: *a*) Financial and political dependence of the former and; *b*) The discretionary elements derived from corporate, union, and political agreements with the powers that be, which has contributed to a lack of transparency and accountability.

Independently of its historical justification, this scheme of administrative centralization (or "centralized" decentralization) and local discretion has defined suboptimal



relationships that generate, among other things, the following problems: 1) The technical and organizational weakening of local capabilities; 2) the lack of correlation between guidelines of educational policy and local needs; 3) The institutional fragility to address local demands in a concerted way; 4) The inexistence, or weakness, of mechanisms to bring to the national public agenda some focalized problems in the local sphere; 5) The lack of confidence and credibility of local actors to generate initiatives for innovation; 6) The perverse division of labor between the local capability of resolving conflicts and the federal capability of providing institutional and technical rationality to the educational system; 7) The federal incapability in providing technical assistance and follow-up for local authorities; 8) The permanent dispute for the distribution of the public budget in the federative entities; 9) The lack of cooperation and exchange of experiences and initiatives between local authorities, and; 10) Great difficulties to establish the culture of evaluation and improvement at the heart of schools, both in institutional management (federal and local) and at intermediary decision-taking levels.

Main Progress of the SNEE and the PNEE

We point out below, in a rough way, the central points on the progress of SNEE and PNEE in order to formulate, afterwards, an interpretative proposal of its scopes and

meanings within the frame of cooperative federalism and the strengthening of local capabilities.

SNEE's Conference

A functional and organizational structure has been built through criteria of regional representation and participation of educational authorities (federal and local) with the finality of exchanging information and experiences related to educational evaluation. During the ordinary sessions ordained in the legislation, for the last three years we have seen the appearance of spaces for discussion and analysis on strategic issues and on the construction of the PNEE, as well as on the organization and functioning of the SNEE.

Spaces for Coordination & Consensus

The Institute promoted the Regional Dialogues for the Construction of the PNEE so local educational authorities could exchange points of view on the relevant issues of the national and local evaluation and improvement agendas—in a closer and more informal environment—with INEE's Government Board. Later, the same format was used with the federal educational authority. The PNEE was built from these spaces of dialogue, and agreement proposals taken to the plenary of SNEE's Conference were selected. From 2014 to 2016, 25 high-level meetings took place with different educational authorities, local and federal.

Definition of the National Evaluation Policy

In November, 2015, the *Guiding Document for the National Educational Evaluation Policy* (Spanish acronym: DR PNEE) was constructed and published (in a joint manner between INEE, SEP, and local educational authorities). It integrates the general guidelines for the policy, the axis of its functioning, the main lines for its action, its working spaces, its priority tasks, and a medium-term (2020) image-objective.

A Federalist Vision through the PEEME

With the DR PNEE as its reference, an arduous labor was developed with the 32 federative entities for the elaboration of the State Educational Evaluation and Improvement Programs (Spanish acronym: PEEME)—planning instruments for the analysis, definition, and guidance of educational evaluation and

Frame 1. State, PMP SNEE's National and International Projects 2016-2020

Category	National Projects		State Projects	International Projects	Total
	SEP	INEE			
Educational achievement of students	4	1	32	4	41
Suitability of teachers and directors	2		30	1	33
School organization	-	-	29	-	29
Educational materials and methods	-	4	2	-	6
School infrastructure	-	1	10	-	11
Policies, programs, information systems and institutions	4	8	23	-	35
Totals	9	15	126¹	5	155

Source: Own elaboration, UNPE-INEE, 2016

improvement actions in basic and secondary education at the federative entities. These instruments integrate three central dimensions: From the national to the local, from the local to the national, and properly school-related². Besides the 62 follow-up actions that—from January to October, 2016—were performed with the 29 federative entities which requested it, during 2016 an intense calendar of meetings was accomplished.

SNEE's Medium-Term Program

PEEMES will be the starting pillars in the coordination of the SNEE, because they will guide and give substance to SNEE's Medium-Term Program (Spanish acronym: PMP SNEE), around which the different evaluation actions—state and federal—will be articulated. 155 evaluation projects are to be developed, 126 of which come from the approach of local authorities, 24 from national authorities, and projects of international character (Frame 1). At the same time, a great national evaluation and improvement project for multi-grade schools was built with the consensus of local authorities. This is an issue of vital importance for the country, though it had been forgotten by the federal educational policy.

Conceptual Bases and Resignification of the SNEE and the PNEE

Towards a Cooperative Federalism

Discussion on federalism as a political and institutional form of the national states is long-standing and it has generated differen-

tagreements regarding its nature, historical scopes, and current validity. For the functioning and the organization of the SNEE, it matters to acknowledge cost-sharing federalism, in which the national government decides to which policies it will allocate resources and what the conditions are, while the subnational level can decide to accept the terms, and, if that's the case, contribute to its development. In this model, there is no room for institutional isolation nor for unilateralism, only for concerted actions out of legal concurrence or political cooperation.

In this sense, the PNEE and the SNEE have generated important cooperation spaces and have developed different regulatory modifications that generate agency aperture; that is, issues or questions come from local initiatives, regional relationships are maximized, and mediation-and-enrichment bridges are built between the local, regional, and national spheres. This is exemplified by the experience of the construction of PEEMES and the way the National Evaluation and Improvement Project for Multi-Grade schools was constructed and defined.

Building "Intimate Congruencies" between National and Local Spheres

Literature on the field points out that decentralization can solve the efficiency and efficacy of the state apparatus, as well as attending—in a pertinent and timely manner—necessities of rural communities. Besides, it allows to deal better with conflicts in order to avoid their accumulation at the

top of the system. In a similar way, along with the improvement of government decisions (and beyond it), decentralization is perfectly compatible with the learning of self-government.

In contrast with its virtues, we are warned that the benefits pinned on decentralization do not always come into being and can even generate some problems—in particular in poor countries—such as an increase in corruption and tax evasion (Murthy & Mahin, 2015).

In this context, the learning that the PNEE and the SNEE have installed—on the basis of real institutional practices—is manifested. It begins by acknowledging that, in spite of the political and administrative recentralization schemes, local educational authorities have learned to manage local conflicts; they have tended to, even with insufficiencies, the gaps left by the national educational policy (as the multi-grade experience shows); they have made progress, even with setbacks, in the strengthening of their educational organizational structures; some of them generate information and knowledge, and propose innovations in various educational ambits; all, or almost all, have documented—with more or less intensity—good educational practices and, in general, they all build their local educational policy agenda within a frame that not only reproduces the national lines but integrates specific diagnosis, focalizes problems, and adapts and integrates educational improvement actions and interventions.

It is also true that, in many federative entities, political *clientelism* and corporate practices—as well as institutional inertias contrary to transparency and accountability—still prevail, as well as, in many cases, a great technical weakness in the definition of actions and interventions for improvement of the policy, the management, and the educational processes.

However, in the context marked by these contrasts, the PNEE and the SNEE are opening different areas of opportunity that are being exploited and will need to be strengthened in the immediate future. With the proposal of educational evaluation and improvement projects, in an environment of construction, learning, and feedback, there are progresses on the line of what some authors have called “negative decentralization,” in which local groups assume greater control of the totality—or most—of the decisions that link them

to national governments, and on the policies which reproduce their existence (González, 1991). However, a greater challenge to contribute to this decentralization design will be the position of the federal educational authority itself, because it can't keep on sustaining Manichaeian stigmas (“local bad, federal good”) without any self-criticism. In the face of that, it will be necessary to convince with deeds: It will perhaps be necessary to generate, before a new institutional architecture, a movement and—along with new decentralizing policies—a new culture.

Inter-Governmental Relations, Governance & Local Capabilities

Recently, inter-governmental relations (Spanish acronym: RIG) have been associated to federalism and decentralization, and also to the frames for the design and implementation of public policies.

The term RIG alludes to a quota of activities or interactions between all kinds of government units and a territorial level of action. Given that no territorial sphere has all the necessary resources (human, financial, legal, and informative) for the development of a policy, “the interaction between them becomes indispensable for this formation, being financial aspects a crucial factor in the analysis of this interaction” (Aoranoff 1991:7).

One of the classic authors on the RIG, D. Right, highlights five operative attributes: 1) All the combinations of possible interactions in policy production and the relations between the government's sectorial agencies at the different levels; 2) Relations that exist only between officials who run government units; 3) Interactions between officials can be casual, formal, and informal; 4) All the government officials are considered potential or effective participants in the decisions on policies, and; 5) There is a tight link-up between policies and the RIGs that are being implemented.

On the other hand, from the field of the analysis of public policies—and from the field of democratic theory—the concept of governance has emerged to refer to more horizontal and participative forms in the exercise of government:

It means precisely the existence of a process for directing society that is not equivalent anymore to the sole directing action of the government, and in which other factors take part [...] which now can hardly be in a

command-and-control mode, by virtue of the political independence of social actors and their relative strength because of the resources they possess... It's the passage from a hierarchical-centralized style to a style of government associated and interdependent between government agencies, private, and social organizations (Aguilar, 2007: 7).

In correlation to the administrative and organizational definition of governance, its social dimension has been emphasized as it supposes coordination, direction, and meaning of the actions taken by a multiplicity of actors in a horizontal and democratic perspective (Martínez, 2007: 72).

The exercise of governance requires, undoubtedly, and alike the performance for a good federalist or decentralized institutional design, the capability of institutions and social actors to participate with responsibility and efficacy. From this derives that the change in the role of the State in relation to the resolution of public problems affects the form and the content of the responsibilities of public agencies. In this sense, to build institutional capacity means to promote and create networks of interaction between public and private sector organizations and non-governmental organizations (Willems and Baumert, 2003).

The three levels of institutional capacity that result from this concept are: The micro level (individuals, public servants); the middle level (the organization, the institutional functioning and efficiency); and the macro level (institutional capacity in its environment) (Segnestam *et al.*, 2002).

The progress in the PNEE and the SNEE open very promising paths of work with the conceptual models of RIG and governance, because they contemplate two axes that the PNEE has pointed out as strategic in its definition and development: Social and institutional coordination, and the strengthening of local capacities.

The systematic reiteration of passing from the national to the local—and from the local to the school—in the proposal of a methodological construction for evaluation and improvement projects has also represented a strategic bet. From there, we need to push governance schemes to mobilize actors and networks, and maybe push a new relation scheme in the processes of implementation—at the micro and medium levels—of evaluative actions, and in the interventions for educational improvement.

It will also be necessary to mobilize and reassign resources facing the scarcity scenario that the country will go through. It is necessary to support, cooperate, strengthen, and respect the law, as well as to provide accountability. SNEE's real center and specific weight to prove if it is possible to guarantee the quality of educational services provided by the State—which is its great constitutional mandate—will lie there.

In Manner of Conclusion

A fundamental claim of PNEE and SNEE's development strategy is to recompose, through evaluation, the basis for a cooperative federalism. Because of technical reasons—as well as because of political and institutional-strategy justifications—we cannot strive to guarantee the constitutional right to a quality education for all just from central spheres. A constitutional right of the 21st century can't be guaranteed with an institutional management model of the 19th century. This has to do, of course, with a cooperative federalism that articulate schemes of integrative decentralization which allow us to leave behind isolation and unilateralism, and to strengthen integrative decentralization through governance models and horizontal inter-governmental relations with a maximum level of cooperation. All of this must be based on the strengthening of local, technical, organizational, political, and financial capacities; and, why not pointing it out, also on self-regulation, transparency, and accountability.

The activation of the evaluation as a system—coupled with the distributive mechanisms of social participation and democratic governability—generates extraordinary opportunities to re-found our educational federalism, as well as to change the inertia of centralized decentralization and imposing and vertical inter-governmental relations.

The guiding criteria—substantive principles of the PNEE-SNEE strategy, we must add—have been clear. By establishing the tight bond between evaluation and improvement at the center of the proposal, the pretension is not only to build a project, but most of all to generate a movement and promote a new culture. The strategy has been clear—having the technical capability and the force of the evidence at the forefront (which constitutes the meaning and the mission of the INEE), the acknowledgment of local needs and realities has been high-

lighted together with respect, cordiality, and the need to share capabilities and experiences and to assiduously strengthen technical assistance and follow-up, to empower and strengthen local technical teams, to end imposition and blind following of orders without eliminating the capacity to direct, to create awareness of gradual accomplishments and make progress in appropriation processes, to foment informed dialogues between technical teams and decision-makers, to acknowledge trial and error as a working method, and to foment self-corrective capacity.

The latter has inspired—sometimes explicitly and sometimes tacitly—the actions taken and the results obtained in the last three years of work on the construction of the PNEE and the organization and functioning of the SNEE, on the basis of the labor around the State Educational Evaluation and Improvement Programs (PEEME). With the imminent integration of the evaluation projects and the actions of institutional strengthening in SNEE's 2016-2020 Medium-Term Program, the federal and local educational authorities will have to prove their institutional effectiveness to put in place, as of now, the mechanisms of what will be increasingly demanded by society as a whole in the medium term—an effective improvement of education and the quality of its results. €

¹ Due to the continuous work of analysis and organization by the PROEMES, the percentages may vary slightly.

² The logic for the formulation of the PEEME integrates three central elements: *i)* A methodology of construction that goes from the identification of the educational problems in terms of gap and inequality, the identification of their critical causes and the identification of evaluation needs associated to the problem and its critical causes; *ii)* A definition of evaluation and improvement projects that stipulate their impact in the medium and long terms; and also *iii)* The guarantee of their political viability.

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THREE YEARS, 32 STATE EDUCATIONAL EVALUATION AND IMPROVEMENT PROJECTS: 2016 BALANCE

How do we guarantee the right to quality education? Three years after the Educational Reform, and working together with the State and Federal educational authorities, INEE proposes a path starting from the construction of State Educational Evaluation and Improvement Programs modeled on the National Educational Evaluation Policy. This is the balance of the path that has been laid down through dialog and evaluation.

The Path Begins

2013. The Education Reform is Passed. Article 3 of the Political Constitution of the United Mexican States (Spanish acronym: CPEUM) assigns the Mexican State the responsibility of guaranteeing the quality in obligatory education such that “educational methods and materials, school organization, educational infrastructure, and the suitability of educators and administrators guarantee the highest learning standards in the students.” Thus, the National Educational Evaluation System (Spanish acronym: SNEE) was established¹ and its coordination was assigned to the National Institute for Educational Evaluation (INEE).²

2014-2015. Autonomous INEE. Under the order of Article 17 of the Law of the National Institute for Educational Evaluation (Spanish acronym: LINEE), and with the participation of the local and federal

educational authorities, by way of the Regional Meetings,³ the INEE, in full autonomy, coordinated the preparation of the Principle Document of the National Educational Evaluation Policy (Spanish acronym: DR PNEE), supported by seven principles—five guiding principles and two cross-cutting principles. Its mission is to contribute to the guarantee by the Mexican State of equal quality education for all children and adolescents in the country. The DR PNEE was presented at the SNEE’s Conference in October, 2015, and it was approved by INEE’s Board of Directors on November 26th of the same year.⁴

2015-2016. Representatives of local educational authorities in elementary and secondary higher education from the 32 federal entities started preparing the State Educational Evaluation and Improvement Programs (PEEME),⁵ following a methodology developed by INEE, that includes four stages: 1) diagnosis (problematization), 2) purposes and projects, 3) actions and goals, 4) calendars and indicators. This path permitted the creation of the Educational Evaluation and Improvement Projects (Spanish acronym: PROEME).⁶

Results in 2016

While finishing the preparation of SNEE’s Medium Term Program, 2016-2020, 32 PEEMES—corresponding to each entity—were designed, from which 126 PROEMES

have been created. On average, each region has presented 25 projects.

The majority of the PROEMES are focused on elementary education, to a lesser extent on secondary higher education, and one tenth of the projects cover both obligatory educational types.

According to the diagnosis and needs of educational services in each entity, PROEMES have been classified into three types (see image 1):

TYPE A PROEME: Proposition of a new evaluation exercise, or reformulation of an existing one, in order to investigate the causes of educational gaps present in the entity.

TYPE B PROEME: Definition of communication strategies and effective use of existing evaluation results which could guide educational improvement.

TYPE C PROEME: Design of strategies for improvement intervention aimed at reducing educational gaps.

In 65% of the PROEMES, new evaluation exercises have been proposed; almost 25% are focused on actions aimed to the use and communication of results, and 10% will design an intervention for improvement.

Table 1. Entity Organization by Region

Central Region: Federal Administration of Educational Services in (AFSEDF), Mexico City Mexico, State of Mexico, Hidalgo, Morelos, Puebla, Tlaxcala.

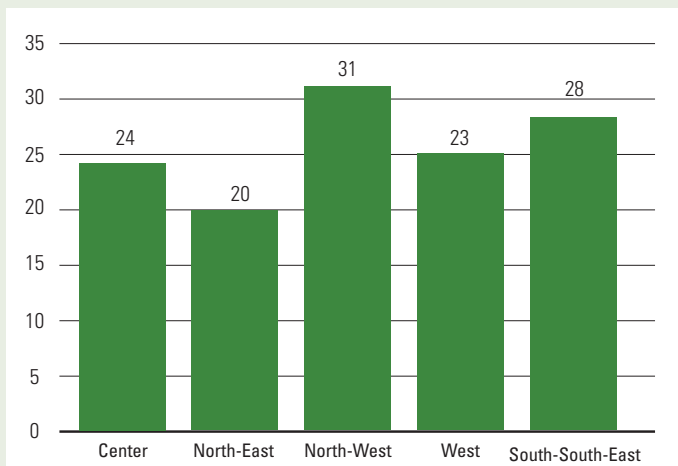
North-East Region: Coahuila, Durango, Nuevo Leon, San Luis Potosi, Tamaulipas.

North-West Region: Baja California, Baja California Sur, Chihuahua, Sinaloa, Sonora.

West Region: Aguascalientes, Colima, Guanajuato, Jalisco, Michoacan, Nayarit, Queretaro, Zacatecas.

South-South-East Region: Campeche, Chiapas, Guerrero, Oaxaca, Quintana Roo, Tabasco, Veracruz, Yucatan.

Diagram 1. Distribution of PROEMES by region⁷



Source: DGC SNEE. INEE, 2016

PROEME and Article 3 of the Constitution

According to Article 3 of the Constitution which has been cited above: “The State shall guarantee the quality in obligatory education”, therefore, from this perspective, PROEMES are classified according to the area of improvement for which they were designed.

The analysis from this point of view highlights the entities which are most interested in contributing to student’s learning goals, suitability of teachers and administrators, and school organization. Another aspect of improvement which is of great interest to the entities, and which

has resulted in an element of innovation, are the evaluation exercises involving policies, programs, information systems, and institutions. To a lesser degree, evaluation exercises are carried out regarding educational infrastructure, and educational methods and materials.

An Outside View

Néstor López, researcher at the International Institute for Educational Planning (Spanish acronym: IIEP UNESCO), with regional headquarters in Buenos Aires, and technical advisor of INEE’s Educational

Evaluation and Policy Committee, mentions that the PEEME strategy within the PNEE framework is valuable because of:

- The network it creates between technical teams from different federal entities;
- The strengthening of skills which results from building local evaluation agendas;
- The consolidation of indicators that will be fundamental to monitoring the educational situation in Mexico.

From his perspective, this is an example of the type of coordination that must be present between a national entity and the local government technical teams in order to advance towards a national policy that is sensitive to the peculiarities of each state, and with respect for local educational policy agendas.

Halfway on the Path: 2016-2018

For INEE, the existence of a regulatory framework is not a sufficient condition to guarantee compliance with quality education, and the same applies to evaluation alone. The definition of the PEEMES and PROEMES in the 32 federal entities implied an innovative federal exercise, but also a step forward in the recognition of educational gaps, in inclusion within the educational policy agenda at local and federal levels, and in the implementation of projects whose objective is to reduce the differences and contribute directly to the improvement of education.

The challenge is no lesser towards 2020, PEEMES will be accompanied by a

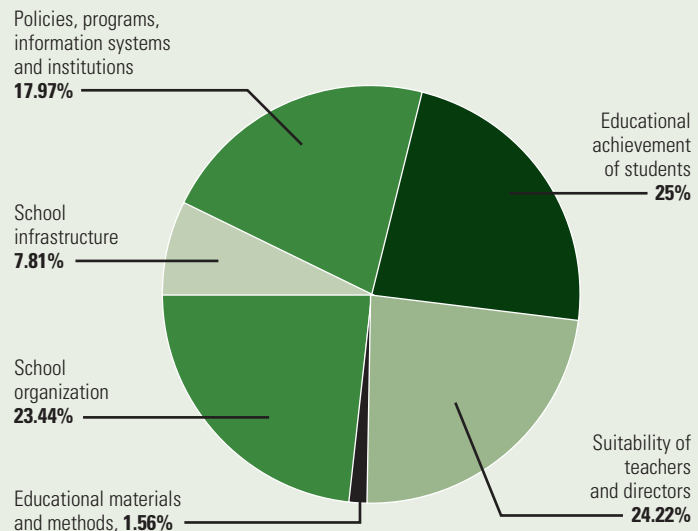
Image 1. PROEME Types	Evaluation	Communication and Use of Results	Intervention
PROEME A	New Evaluation	Communication and Use of Evaluation Results	Intervention
PROEME B	Existing Evaluation	Communication and Use of Evaluation Results	Intervention
PROEME C	Evaluation Basis	Basis for Use and Improvement	Intervention

Source: DGC SNEE. INEE, 2016

monitoring and follow-up system regarding the goals established in the PROEMES. This is a follow-up apparatus that will make the amount of progress evident, as well as pointing out what remains to be done in order to comply with the responsibility of equal, pertinent, and quality education, and its path will be clearly signaled in the Medium Term Program of the SNEE, 2016-2020. €

- ¹ Defined legally as “an organic and coordinated set of institutions, processes, instruments, actions, and other elements that contribute to the fulfillment of its purposes, with the objective of contributing towards guaranteeing the quality of educational services provided by the State and individuals with authorization or official certification of studies” LINEE. Articles 11 and 12.
- ² The objective of the Institute is to coordinate the SNEE, and to evaluate the quality, performance, and results of the National Educational System, regarding public and private elementary and secondary higher education, in all its modalities and services. (Article 25. LINEE. New Law DOF 11-09-2013).
- ³ Regional representation in Dialogs has been developed based on the Guidelines for the Organization and Operation of the SNEE Conference: Central, North-East, North-West, West and South-East Regions.
- ⁴ On November 26th, 2015, by way of resolution SOJG/11-15/12, R, the Board of Directors of the INEE approved and published the Principle Document of the National Educational Evaluation Policy.
- ⁵ They can be understood as planning instruments for the analysis, definition, and orientation of educational evaluation and improvement actions in obligatory education.
- ⁶ Each PROEME has its own purposes, goals, actions, as well as implementation calendars and follow-up indicators, projected to 2020.
- ^{7,8} Due to the continuous work of analysis and organization by the PROEMES, the percentages may vary slightly.

Diagram 3. PROEME Types, according to Article 3 of the CREUM ⁸



Source: DGC SNEE. INEE, 2016



Learn more about the PNEE:

Consult the previous issues of *Nautical Letter* in the *Gazette* No. 4 and 5, in the blog: <http://www.inee.edu.mx/index.php/blog-de-la-gaceta/>



Read the *Special Supplement for Decision-Making: The SNEE and the National Educational Evaluation Policy: Progress and Perspectives* on the PNEE microsite: <https://goo.gl/xXMrMI>

Why Multi-Grade?

1 327 388 Mexican Students are in Multi-Grade primary schools. Only the community courses imparted by the National Council for the Promotion of Education (Spanish acronym: CONAFE) are designed to work in multi-grade education. In Cuba, Colombia, Finland, and France, countries with a broad support system, there are no differences in academic achievement between students from multi-grade schools and regular schools (INEE, 2015).

The Multi-Grade Schools:

For years, they have been restricted from offering quality education services. They are concentrated in rural areas with high or very high levels of marginalization, in indigenous communities, and with a population of migrant laborers (INEE, 2015).

Priority:

There is an urgent need for the design of an educational policy that promotes the development of an integral and systematic strategy for multi-grade education in Mexico (INEE, 2015).

Federalism in place:

In an unprecedented exercise, Mexican federal organizations, together with INEE, Conafe, and the National Institute of Physical Infrastructure for Education (Spanish acronym: INIFED), have designed a National Education Evaluation and Improvement Project for multi-grade schools.

Upon the publication of this special supplement, the **Gazette** has opened spaces for new forms of narrative for the discussion on evaluation:

The Multi-Grade Schools Work Group stands out among the most innovative works developed within the framework of the National Educational Evaluation Policy in 2016. This is their voice and proposal from the report: *From Local to Federal: The Unprecedented Creation of an Evaluation Policy for Multi-Grade Education in Mexico.*

The Thematic Network of Research on Rural Education, which brings together 30 members from 17 federal entities, is the only one in Mexico that has multi-grade schooling as one of its focuses of interest. Diego Juárez Bolaños, researcher at the Institute for the Development of Education, of Ibero-American University, and in charge of to the Network, addresses the issue in his article: *Local and Federal Particularities.*

For the past eight years, in the middle of the south-eastern mountain range of Mexico, there is a flourishing space for learning where the voice of the elderly is as valuable as that of teachers. Older students guide the younger ones, and community knowledges are used in the classrooms —the Center of Indigenous Arts. Jay Griffiths, English writer, tells their story in her chronicle: *Educated in Nature: A Multi-Grade Experience in the Veracruz Mountain Range.*

SPECIAL REPORT: MULTI-GRADE SCHOOLS
REPORT

From Local to Federal: The Unprecedented Construction of a Policy Evaluation for Multi-Grade in Mexico

In June 2016, in the National Educational Evaluation System Conference, **Héctor Eduardo Vela Valenzuela**, ex-Secretary of Education of Durango, lay on the table the issue of multi-grade schools in Mexico. Several officials supported him, as well as the National Institute for the Evaluation of Education. Today, 29 entities are proposing to the federation the National Educational Evaluation and Improvement Project for Multi-Grade Schools. This report tells the story.

Antecedents: Multi-Grade Before the Pronaeme

“There have been no experiences of attention to multi-grade education, coming from the Secretariat of Public Education (Spanish acronym: SEP), at least for ten years,” mentions Diego Juárez Bolaños, researcher at the Research Institute for the Development of Education at Universidad Iberoamericana and Head Technician of the Topical Network for Research in Rural Education (Spanish acronym: RIER), a work group of 30 members, from 17 entities in the country, which decided to join the task. ¹ In some entities, this has generated initiatives and attention areas devoted to rural matters and multi-grade in particular, which has implied the design of materials or programs. For example, a program inspired on the New Colombian School, picked up in Puebla in the last few years. The topic has become so diluted, that this year in the operating rules of SEP’s Program for Educational Inclusion and Equity (Spanish acronym: PIEE) multi-grade is not even mentioned. This is terrible. The last relevant proposition posed by the Federation through SEP to attend this category was called *Multi-Grade Education 05*,

submitted in 2005. From that year onwards, multi-grade was forgotten by SEP’s administrations.

Juárez Bolaños delves more into the topic:

We have to think that multi-grade shouldn’t have to be a deficiency, but an opportunity. I like to say there is not just one model of multi-grade education, but many. The important thing would be to think about strategies, methodologies, materials, work spaces, and projects stemming from the context a rural school is inserted in; each teacher should be able to decide what is most pertinent for his or her students, because it’s not the same thing to tend to a rural school in the State of Mexico than a school for migrant day-laborer children in Sinaloa, or an indigenous school in the *Huasteca Potosina* region. Multi-grade allows for that flexibility, but at the same time it is necessary to be rigorous and methodical — this has to be a well-thought process. This is a strategy that’s been implemented and tested not only in Mexico, but in many other countries.

Birth of the National Educational Evaluation and Improvement Project for Multi-Grade Schools (Spanish acronym: Pronaeme)

In June, 2016, the National Institute for the Evaluation of Education (Spanish acronym: INEE) set up a work group aiming to tend to the problems of multi-grade schools in Mexico and thus propose ways for educational evaluation and improvement for 43,665 multi-grade schools, which represent 44% of the totality of public primary schools in Mexico.

“The contribution—enrichening and professional—of our liaisons in each state represents the learning the work in this group offers,” indicates its general coordinator, Héctor Vela Valenzuela, ex-secretary of Education in the State of Durango, who—in an unprecedented exercise in the history of educational policy in Mexico—coordinates the work of five groups supported by INEE to set down an educational-improvement proposal based on an evaluation presented by the States to the Federation.

Juárez Bolaños mentions the importance of this initiative putting it into the perspective of a background in which the subject has been oversighted:

“This work group—supported by the INEE—is definitely the most important initiative in the last decade for attention to multi-grade. Now we have to give continuity to the group and see to it that its proposals are turned into real actions. Given that our objective is for multi-grade education to improve, the challenge is that these proposals lead to educational policies of attention to this modality.”

As Vela Valenzuela explains:

“It’s a construction backwards. Contrary to what’s usual, it’s not the federation telling the states what to do, but the latter are the ones which—based on their local reality—analyze, discuss, diagnose, and define



what they need to improve; in this particular case, multi-grade schools. This implied a very important local work and it represents the opinions of teachers in the provinces, which is why it will be crucial that the proposal is taken into account by the federation once it is consolidated. This is why there is the intention of taking the proposition to the Conference of the National Educational Evaluation System (Spanish acronym: SNEE) for its approval, with the goal of the National Educational Evaluation and Improvement Project for Multi-Grade Schools becoming part of SNEE's Medium-Term Program 2016-2020. I know very well that the times we are living in deserve a working method such as the current one. However, in time, a policy for the decentralization of functions, resources and, most of all, decision-making must be generated. In that sense, it's undoubtedly important for margins of freedom to exist that have to do with regional and local approaches. It is important to advance further in matters of federalism."

Current Panorama

"At this moment, the main challenge is to create a national awareness to attend to multi-grade schools," says Vela Valenzuela, "considering that the most vulnerable children in the country are there. This is something that has already been achieved since the political and professional willingness of most Secretaries of Education gave as a result the integration of this group, at INEE's initiative, in which we worked on an evaluation and improvement program. One of the great conclusions we reached is the need to do things differently. We can't use the curriculum the same way as in a regular school; so, then, we have to adjust it in order to achieve adequate teaching plans. Educational materials and occupational structure must be different too. If we talk about—and this is a Constitutional precept—offering quality education to all Mexicans, we see important gaps and lags in multi-grade. Then, even if it would seem utopian at the moment, we have to start working to succeed in offering the same quality education to children in mountainous regions—or children in indigenous areas—as that received by children in the capital."

"First thing is there must be someone directly in charge at SEP," Diego Juárez insists. "A specific area for the attention of rural zones and multi-grade must be formed

at the Secretariat again; this doesn't entail just a department, but a work plan, a diagnosis. Second, we are not advocating centralizing again, but for that area to work as a supporting entity for those entities that attend to multi-grade education, it is necessary to understand that many states already have their own initiatives. The goal would be to strengthen state programs and groups, and promote their creation in those states where these don't exist. The next point is related to evaluation. Despite all the evaluations that have been done, and despite SNEE's strength, there still are some gray areas, particularly in multi-grade. We already have diagnosis even at a school level, at the level of learnings, but there are other elements. The census made by the National Institute of Statistics and Geography (Spanish acronym: INEGI) in 2013 helped us to verify infrastructure issues that we can differentiate for multi-grade. But this is not so in all areas. For example, nobody knows how many supervisors or technical educational advisers attend to multi-grade school in Mexico. We need information. We have information on students' learnings, on schools' infrastructure; we have estimates, but we don't fully know what's happening. Another element would be to evaluate and know when we lack enough information and then build what we are trying to accomplish here—a national, state, and municipal support program for this modality.

Organization

Héctor Vela Valenzuela tells us that Pronaeme's functional scheme began in an internal work group composed of officials from the local Secretariats of Education in the states:

"In a natural way, institutions which helped to get greater support for this task joined, like the National Institute of Physical Infrastructure for Education (Spanish acronym: INIFED) and the National Council for Education Development (Spanish acronym: Conafe). What is really enriching about this process is that it nourishes itself with the contributions of specialists, of teachers who are in the line of fire every day. Each state has proposals that were discussed in the regions; but, in order for everyone to outline its proposals consultation processes were implemented. In Durango, for example, polls were generated with 250

supervisors and an online poll for teachers. Thus, a work methodology was established so that contributions by a huge number of people could allow us to design the proposal that is presented today as the first draft of the National Educational Evaluation and Improvement Project for Multi-Grade.

Thus, the entities, organized by regions, worked in sub-groups on the following issues: Supervision and Technical Pedagogical Counseling; School Management and Organization; Infrastructure and Equipment; Curriculum, Educational Materials and Practices, and Teacher's Initial and Continuous Education.

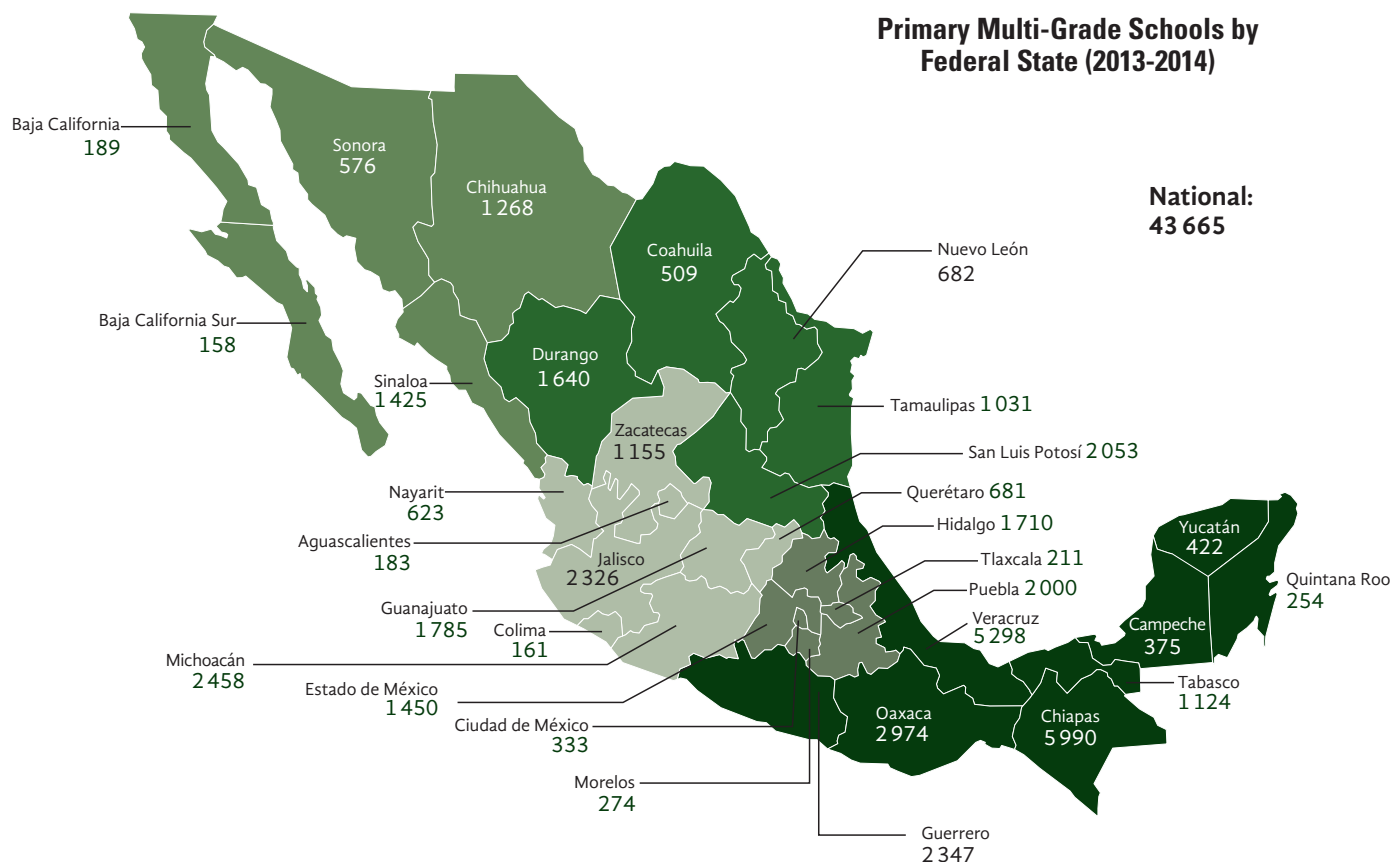
Other institutions have also joined, such as the General Direction for Indigenous Education of the Secretariat of Public Education, the Topical Network for Research in Rural Education, and the INEE, through the Educational Policy and Normativity Unit."

Guadalupe Alonso, Assistant Director of Social Inclusion, and Cesari Rico Galeana, Assistant Director of Communitarian Middle-School, both dependent from Conafe, tell us:

"For Conafe this is a very important issue," says Cesari Rico. "Conafe began working with multi-grade groups 45 years ago. It's in its nature. There is no other modality that isn't multi-grade groups. Since then, it has faced the need to find all technical-pedagogical, operational, logistical and infrastructure aspects. Through these years, the SEP has made some studies, but not enough to address this need. So, Conafe is very pleased to see this possibility of a National Educational Evaluation and Improvement Project for Multi-Grade being opened."

"I would also add that it's a matter of equity too," Guadalupe Alonso says. "At the end of the day, Conafe reaches the most isolated places in the country, where there is no other offer by the educational system. And, notwithstanding our importance, sometimes we are invisible; we don't benefit, for example, with programs the federation offers. Thus, the opportunity presented for us to become part of the Pronaeme is very important in terms of being able to benefit from everything the national system has to offer. This has been very interesting and very gratifying because, finally, there is a contribution to the formation of technical staff at the local and state levels."

Primary Multi-Grade Schools by Federal State (2013-2014)



Source: INEE (2015). *Panorama Educativo de México 2014. Indicadores del Sistema Educativo Nacional. Educación básica y media superior.* México.

Work Groups

Central Region: Supervision and Technical Educational Counseling.

This group is formed by authorities of Mexico City, State of Mexico, Hidalgo, Morelos, Puebla and Tlaxcala.

Lucero Nava Bolaños, Office Manager of Puebla's Secretariat of Public Education and Coordinator of the Central Region of the Supervision and Technical Educational Counseling Group, points out:

"We have to make a national effort without precedent, because there are many multi-grade schools. We have to establish a model that tends to diversity in a pertinent way and facilitates teachers' administrative tasks, because we overwhelm them with paperwork as if they had an assistant director and a secretary. And these are schools that fulfill a very important social role. We have to recognize that this can be a very successful modality if we provide the right scaffolding to it. Within this

framework, the first challenge is to generate a model of curricular and didactical adaptation for organizing multi-grade schools; the next challenge is to strengthen counselling and supervision teams so teachers feel accompanied, have the best orientation, and start to work out a definition of multi-grade pedagogy, which is wonderful, because children benefit a lot from it, but we haven't been able to identify their learnings in a multi-grade context. We can't close our eyes to the reality of those children. We would like to offer them other solutions; but, at the moment, the country doesn't have them. We can't take fully organized schools to each community in every location. This is a reality we need to solve.

School Management & Organization

Elva Salazar Rangel is a Coordinator for the Northeast Region of the Group for School Management & Organization, and an Academic Adviser in the Education Secretariat of the State of Durango. The Group is formed

by members from Coahuila, Durango, Nuevo León, San Luis Potosí and Tamaulipas.

Salazar Rangel enumerates different challenges in this category:

"One of the evaluation needs that we identified is efficient use of time. We are proposing to evaluate the organization within schools and how much time teachers dedicate to each of the activities of the organization. To this, we could add the conditions in which teachers perform. As for supervision, we are proposing to evaluate time efficacy in multi-grade schools. In terms of occupational infrastructure, the problems—related to the gap—are the opportunities for children's comprehensive development. We want to evaluate what conditions allow for children's comprehensive development."

Infrastructure & Equipment

Edith Chavira Campos is the coordinator of the Northwest Region of the Infrastructure and Equipment Group. Belonging to

this group are the entities of Baja California, Baja California Sur, Chihuahua, Sinaloa, and Sonora. Conafe and INIFED have also joined.

Chavira Campos leads primary education in Baja California and is the head of the federal program for Educational Inclusion and Equity and of support to migrant laborers. She expresses:

“The multi-grade situation is extremely complex, not only where equipment is concerned. Besides the fact children are dispersed in their communities, they go to a school that doesn’t have the right conditions for the teaching-learning process. The teacher is as vulnerable as the child. Public policies do not promote optimal conditions. Our schools do not have electricity, nor water, nor basic services. Sometimes, schools are set in small communities where there are four or five children, but in a settlement a couple of miles away there is another child, who has to walk two hours to get there. So, they gather in a multi-grade school, but the school doesn’t pamper them, it doesn’t hug them, or tell them: ‘Look, you’re going to be here three, four hours, and we are going to help you so that, somehow, you feel happy here, so you feel like these spaces are yours.’”

The same public servant breaks it down:

“Another challenge is the issue of the physical conditions of classrooms in which these services are implemented. Sometimes there are classrooms, sometimes there aren’t. Sometimes there is furniture, sometimes the children don’t even have a place to sit in. The great digital gap is important too; there is no connection to internet, no electricity.”

Melisa Sánchez Martínez, technical coordinator of INIFED, says:

“Since 1944, we have a specialized agency, formerly called Administrative Committee for Federal School Construction (Spanish acronym: CAPFCE), and we are governed by the General Law of Educational Physical Structure (2008). In Latin America there is no other institute such as this one, specially dedicated to educational physical infrastructure. We are specialists and pioneers. We had already noticed that many multi-grade schools are settled in an irregular way, which means they don’t have property titles. It will be difficult for any infrastructure program to reach them because we cannot invest, not the federation nor the states, in a land that is not public. To solve that, a legislative reform would have to be passed; but, in the

meantime, other actions can be taken. One of them is to go to the municipal authorities and propose them to donate land with the right features to regularize schools that don’t have a property title, or to do the legal procedures for *ejidos* [communally owned land] to grant land for these schools. Regularized schools are the ones that—in general—get the resources, and those are in very good shape. The issue here is that those schools in an irregular situation are the ones that can’t be supported, and whose infrastructure is lacking the most. We are making a pre-diagnosis of infrastructure and equipment. There is no complete, real, updated diagnosis on multi-grade schools that allows us to know the general conditions that would help us make decisions and know what priority issues are. Today, we don’t know how many schools are in an irregular situation and how many are regularized; the states do not have this information. We are placing at their disposal a document to know the infrastructure status, besides opening a module of the system that will allow them to have an analysis with data on the infrastructure. It is very important to have a diagnosis of the multi-grade infrastructure to make decisions aiming to reduce the inequality gap. The best social equalizer is education.

Curriculum, Educational Materials & Practices

On this subject, Cesari Rico says:

“The first challenge is that there is no school curriculum proposal for multi-grade coming from the national study plan. Historically, what has been done is trying to adjust the curriculum proposal of the uni-grade school. This has brought as a consequence that only one professor, in our case a single Leader for Community Education (Spanish acronym: LEC), is forced to teach all subject-matters for all the grades under his care. Not having that curricular proposal for basic contents—nor a way to work with them in an integral manner around unifying issues—has brought a very serious problem, because it’s very difficult to train a person within these diversities. So, then, we find a variety of ways to tend to multi-grade.”

Alejandro Ávalos Rincón is the coordinator of the Western Region and Director of Educational Equity Support Programs at the Secretariat of Education of Guanajuato (Spanish acronym: SEG) of the General Direction of Basic Education. This group deals with the

Curriculum, as well as Educational Materials and Practices, and it includes the entities of Colima, Guanajuato Jalisco, Michoacán, Nayarit and Querétaro. Ávalos Rincón comments:

“It’s very important to accompany the teachers in this evaluation process to get them to know the culture each of their children comes from, and how we can build together transcendent learnings for the life of these children. It is necessary to develop a specific curricular approach for multi-grade schools and, at the same time, to generate support materials and resources respecting the culture of each community, because these aren’t just rural anymore, there are also urban ones. Another challenge is to acknowledge the pedagogical contribution teachers make to the national curricular approach. Finally, it is necessary to share among teachers and generate spaces to discuss and rethink the curricular proposal. It’s important that we don’t leave multi-grade teachers alone; that they have a technical-pedagogical accompaniment. They have initiatives and strategies that apply methodological processes that can be gradually adjusted to the children’s characteristics. It is also necessary to achieve the best location for teachers, and that multi-grade schools’ occupational structure doesn’t consider single teachers, but one to tend first and second grades and another one to tend third, fourth, fifth and sixth grades. We should make a big institutional effort to have schools with teachers who focus in literacy and mathematics in the first cycle. What we are saying is that unitary schools should become bi-teacher schools, which entails the modification of the occupational structure and a specific revision from all the areas in the Secretariat of Public Education.”

To this respect, Cesari Rico says:

“Conafe is making a very important bet, very innovative. It’s really revolutionary in a certain way, and that’s asking ourselves if an educational model could exist without grades. That is to say, to have all the children in one educational space, not separated by grades but working the same subject matters at different depths, according to the possibilities of each student. We have seen children of a certain chronological age, but a more advanced mental capacity, and then someone says to him: ‘No, you can’t learn that because you’re going to see it later. Wait’. And there are cases in which a child who should already know something, because of

his chronological age, is told by the teacher: 'You should know this already, let's move on.' In both cases, the fundamental principle of personal development is overlooked."

Initial and Continuous Education of Teachers

Esmeralda del Rocío Vera Ibáñez coordinates the South-Southwest Region and works on Initial and Continuous Education of teachers; she's the Director of the Statistics System at the Secretariat of Education of Tabasco, which, along with Campeche, is responsible for this issue. The group comprises the entities of Campeche, Chiapas, Guerrero, Tabasco, Veracruz and Yucatan.

Vera Ibáñez comments on her perspective on the creation of this group:

"I think it's very interesting because there's a lot of field experience stored in the entities. They send us models and proposals from the center, without including the point of view of the entities. Proposals sent from the center are effective, but each entity has its own necessities, its ethnic groups, its customs and habits. This is harmful in the long run because the expected results are not achieved. Multi-grade schools have something in common: They are very dispersed; they have little or no didactic material within their teaching channels, they have a teacher—facing a group—without specialized formation to tend to children from first to sixth grade, or from first to third grade, because in teachers' school a teacher is normally trained to tend to a single grade. For the first year, they give you six books; but if you are a multi-grade teacher, you have to multiply six books by six grades, how many books has to master that poor soul! And then, above all, having to use the right words to be understood, from the 6-or-7-year-old child to the teenager who's already 12 years old. That's very complex."

According to Chavira Campos:

"Multi-grade schools are schools in which a teacher used to be kept for six months and moved forward from there. These are schools of passage, and that is another weakness for the educational community. In fact, in the state of Baja California, we used to demand that teachers would stay at least for the duration of the school cycle. Now, with suitability assessments, multi-grade schools should be considered to find suitable teachers that are not necessarily first-timers. Such suitable teachers who know the plans and the programs, and who are able to plan, could go

to multi-grade schools. It's not only the lack of a classroom and equipment, but the lack of a pertinent proposal to work with. Not even technical-school councils contemplate a guide for a multi-grade group, only primary and preschool are contemplated. A space should exist for all the multi-grade to meet, perhaps in local, regional or municipal meetings, so they don't feel alone, because they are utterly forsaken and we demand from them, from teachers as much as from students, the same as from others."

In this sense, adds Guadalupe Cú Balán, State Evaluation Coordinator of the Secretariat of Public Education of the Government of the State of Campeche, and also Coordinator of the Group of Initial and Continuous Education of teachers:

"One of the important issues that we are tackling, and which is making a lot of noise, is that teachers' profiles are not defined with respect to multi-grade education in basic education. We have to align the profiles of the Professional Teaching Service. That's a great challenge. What are we observing? Teachers complain about their continuous education. They need courses on didactic planning, learning strategies, on how to teach children from first to sixth grades. How to approach that diversity of children? We can't assess all teachers the same way. The contexts are different. That's why the participation of Conafe in this proposal is very gratifying, because it allows us to know the points of success that they have had, and further on, set them down in the secretariats of education in each of the states. Another challenge is teachers' mobility. Teachers are one year, or two, in multi-grade schools and then they want to change. We have to return to the permanence bonus to foment their hold within the community. Teachers are important in the community because they are the figure of knowledge. For the community, teachers are the most important figure. We have to offer teachers a benefit that will allow them to take root in the community. We have to give them a differentiated treatment. Being away from their own communities, from urban areas, is difficult. We have to convince them that the community needs them. We have to work on teacher's mystic, which has been lost in some places. The other challenge is initial education, those students who have a penchant for working in their community should be studying at teaching schools. Our evaluation proposal

has to do with teachers' profiles, because we have to build this profile for multi-grade, and we also need to know what an evaluation would be like. We need a diagnosis for teachers in multi-grade schools, so that—based on it—a treatment can be designed that allows for improvement to happen."

From a Local Perspective to a National One

Cesari Rico comments on the way Pro-naeme works:

"It seems to me that it's a wise move because we are used to vertical policies, only from the top to the bottom, not the other way around. Now five regions have been outlined, and a very minute work was made on one of them. From what we saw in the presentation of the results, it was a very professional work. This is proof that taking the base into consideration works, going to the locations, to the community, to the region, and building up from there. These diagnostics on each of the issues are of a very good quality, why? Because those who made them are those who are living the problem of multi-grade every day. They are the ones who are facing the problems of children with lags, the children that don't go to school and the ones that do attend. For me it was a wise move to start from the bottom and go up from there."

Cú Balán states:

"Always, and at all moments, it's possible to rebuild and rescue federalism. We have to work from the base; in this case, from the federative entities, from the students, the professors, and the citizenry. We have to see the existing issues and not the other way around, to assume that an issue exists and then deal with it. We hope that this work we have been doing in a collegiate manner from our federative entity, Campeche, is afterwards set down in the South-Southwest region and in the whole of the Mexican Republic. The only interest we must serve is educational improvement."

Guadalupe Alonso:

"Ever since many years ago, the scholars of policy construction have been saying the only way to guarantee any reform is going from the bottom up; there is no other way. I believe this is a great success on the part of INEE. Not only because of the issue of pertinence in politics, but also because of the formation of technical staffs, and also getting people from the entities to establish a

New States Join to the Project

The 2016 second edition of regional meetings with local and federal educational authorities was held from the 3rd to the 7th of October this year. That was the stage to present the advances in the National Educational Evaluation and Improvement Program for Multi-Grade Schools, and to set down the immediate path to follow. Within the frame of those close dialogues between educational officials of the country, Quintana Roo, and Oaxaca decided to join the task that has been accompanied by INEE through the General Direction for the Coordination of the National Educational System of the Normativity and Educational Policy Unit (UNPE).

Francisco Miranda, Head of the UNPE, and Executive Coordinator of the SNEE Conference, says:

“It was an exercise that—through the identification of the gaps in each entity—contributed to the acknowledgment of the inequality and inequity in the country. The programs helped each entity to outline, from the local level, the need it had for evaluation and how it could deal with it. The methodology for its construction (says who has coordinated the accompaniment of this task from the Institute) is based on the theory of a change we have to push in the country and it has a strategic vision. A monitoring scheme will accompany the outline of the PEEME towards 2020.”

The Pronaeme will be part—as one more PEEME—of the SNEE 2016-2020 Medium-Term Program, leaving documented proof of it, as Sylvia Schmelkes—President Counsellor of the Institute during the SNEE Conference held the 11th of October this year—said: “The fact that the states have participated is a good indicator of the progress we have made in evaluation culture. The state programs in matters of evaluation are being built in a federalist manner.”

dialogue with the specialists of the Institute offers a mutual enrichment. The INEE has done all this work very well, in many senses, their methodology is impeccable. We feel it is a great interlocutor, and this permeates. When the policy is put into practice, it will be truly pertinent and it will have a positive result towards the improvement of the service. That is my wish and the reason why we are so enthusiastic, that’s why we came here and that’s the reason why we want to participate and have an influence on it.

Cesari Rico:

“What I would say is that, at the end of the day, the issue does matter a lot because 40% of schools in our country are multi-grade, four out of ten. And it would seem that decisions are made only for six out of ten. But, in addition, as if that wasn’t enough, they are in the most forsaken conditions, in the most far-flung places, where equity hasn’t arrived yet. It is true that the government and all of us are looking for quality in education, but it is also true that we are indebted with those cases where we haven’t known how to reach to them, or haven’t been able to. It is urgent that we take some measures. But, on the other hand, I am pleased because at least we have started, it has begun and it may take a while now, but it was going to take a lot longer if we didn’t start. So, let’s hope this program is a success, and that, when the public policy is attained, the INEE, after the research, does whatever it takes so that SEP and all of us have a real and concrete solution to this multi-grade issue.”

Conclusions

For Héctor Vela Valenzuela, National General Coordinator of Pronaeme, the themes for the improvement of multi-grade are:

“To begin with, finding a different management and organizational scheme. Improving supervision, that is a fundamental element for education improvement. Today, effective supervision is crucial, with supervisors duly trained and motivated to do a technical-pedagogical work. In the past, a huge number of supervisors were fundamentally dedicated to administrative issues. Today, we need them to be real leaders in technical-pedagogical issues. In that sense, it is important to give a new dimension to their figure in multi-grade school, and to the profile of the technical pedagogical advisor. We require administrative funds so that

the teacher of the multi-grade doesn’t lose a week of classes because of an administrative proceeding, for example. Then, from there, outline schemes that allow us to free our teachers of any administrative burden. To look, for example, for itinerant teachers, English teachers, Sports teachers, Art teachers who would visit schools periodically. We have to try to find a new way to work with them and a different continuous-education scheme. I have seen evidences of young people right out of teachers’ school who are terrified about going to a multi-grade school because they feel they don’t have the necessary elements to tend to it. Today is necessary that in the reform of teachers’ schools the curriculum is modified also to emphasize multi-grade schools.

Finally, given that all states of the Mexican Republic have multi-grade schools, it would solve a lot of problems to emphasize their existence in the study plans of teachers’ schools. As for the training and continuous formation of our teachers, that has to be re-designed too because scenarios are different,” says Vera Valenzuela. €

Interviews:
Magdalena Alpizar
Laura Athié
Lizbeth Torres

The *Gazette* thanks Alejandro Gamboa Juárez—Project Manager of the Certification Direction of the General Direction for Education, Training, and Certification—for his valuable help in the making of these interviews.

¹ Participating in RIER are professors, academicians, independent persons, and post-graduate student who are interested in issues of rural education, from: Universidad Pedagógica Nacional Unidad 321, Zacatecas; Benemérita Escuela Normal Veracruzana; Universidad Intercultural de Chiapas; Universidad de La Ciénega del Estado de Michoacán de Ocampo; Universidad Autónoma de Sinaloa; Universidad Iberoamericana, Ciudad de México; Universidad Pedagógica Nacional Unidad 241, San Luis Potosí; Escuela Normal Rural General Matías Ramos Santos, Zacatecas; Escuela Normal Urbana de Balancán, Tabasco; Centro de Investigación en Alimentación y Desarrollo, Hermosillo, Sonora; Escuela Normal Regional de la Montaña, Tlapa de Comonfort, Guerrero; Centro Regional de Educación Normal Javier Rojo Gómez, Baca-

lar, Quintana Roo; Universidad Autónoma de Querétaro; Universidad Pedagógica Nacional Ajusco, Ciudad de México; Benemérita Escuela Nacional de Maestros, Ciudad de México; Centro de Investigación y de Estudios Avanzados, Ciudad de México; Instituto Tecnológico de Estudios Superiores de Occidente, Jalisco.



Would you like to know more about multi-grade schools in Mexico? Read our infographic in the section *Así vamos*, on page (52) of this *Gazette*.

Do you want to know about the particularities of the Pronaeme? Visit PNEE's micro-site at INEE's site: www.inee.edu.mx

SPECIAL REPORT: MULTI-GRADE SCHOOLS

ARTICLE

Attending Diversity Through Multi-Grade Schools

“Students’ evaluation in multi-grade schools should be re-conceptualized, with the aim of considering several experiences that not necessarily are measurable,” says the author, responsible for the Rural Education Research Network, who talks of a socially debt generated by the way in which the services that reach localities are offered.

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Numerically important within the Mexican Educational System (Spanish acronym: SEN), multi-grade schools—namely, places where a teacher attends more than a single school grade—constituted 53% of the country’s nursery schools, 51% of the primary schools, and 25.4% of the *telesecundarias* [TV-based distance learning] during the 2013-2014 cycle (INEE, 2015:305).

Just as specialized literature points out (Ezpeleta, 1997; Ezpeleta & Weiss, 2000; Fuenlabrada & Weiss, 2006; SEP, 2006; Juárez, 2016 and 2009; Juárez & Rodríguez, 2016; Juárez, Vargas & Vera, 2015; Taboada, 2014), a good portion of rural multi-grade schools in Mexico have insufficient or precarious infrastructure

and equipment, besides being placed in locations with a high level of marginalization, which further complicates the teaching work and the learning processes on the students’ side. Teachers working in those sites require to improve their processes of continuous training, with the goal of strengthening multi-grade work strategies in curricular planning and adjustment, teaching strategies development, collaborating work, as well as pertinent and contextualized evaluation, to mention some.

It is also necessary to improve the processes of management, administration, and school supervision to attend the particularities of multi-grade schools, where some teacher perform simultaneously executive and teaching tasks.

In recent years, studies on good practices displayed by diverse actors or institutions involved with the schools have taken root. However, and following Pieck (2012:41-42), we rather talk about meaningful experiences than good practices, since “practice can only be repetition without learning (...) Meaningful is related, in terms of response to needs, to adaptation to a context (...) Something is meaningful because it leaves something in those persons participating.”

In the framework of two research projects, we tried to get to know better, and study, meaningful experiences developed in four rural primary schools in the states of Hidalgo, Veracruz, and San Luis Potosí; these were places where a single teacher attended all the existent school grades. In these schools we interviewed teachers, authorities, students, and parents, and we also watched their lessons. With the risk of simplifying complex and particular situations, down below we will try to review the key results obtained.

Following the proposals elaborated by several instances (like the 2005 *Multi-Grade Educational Proposal* elaborated by the



Secretariat of Public Education), teachers approach contents by means of a common theme, generally a trans-disciplinary one, directed to all the students. Then, they develop strategies so that students, according to their own interests, ages, and/or grades may carry out activities of various levels of complexity, whether with the teacher's direct support or through autonomous work entailing research activities which imply using text books, library books, electronic tablets (wherever they're available), observation, or interviews to community members, to name a few. After that, spaces are opened to share and socialize the themes before grade, or group, fellow students, and even before parents.

For teachers, that implies an enormous strength in the area of class planning and a certain degree of flexibility, agreed with authorities such as supervisors and/or technical-pedagogical advisors, to allow them to approach the grades' contents in different time periods which not necessarily match those established in school calendars.

It needs to be stressed that the studied schools count with infrastructure, equipment, and learning materials which favor the development of activities. Its existence implied huge management efforts—both by teachers themselves and by parents—to obtain, manage, and demonstrate external resources stemming from diverse sources—essentially at state level, but also from foundations, and civil society organizations.

As we have pointed out in previous studies (Juárez, 2011), in many rural communities it is because of collective efforts that some public works and services reach and remain in those places. Thus, governmental actions orchestrated in rural zones do not account for the economic and social efforts their inhabitants have had to do beforehand so as to provide in their communities—and maintain—services (like schools, in these cases) or infrastructure (electric power or roads). This “social debt” (by forcing the poor to spend bigger resources for public services or works that are offered for free, or at a lower cost, in other contexts, mainly urban) keeps increasing since there have been no changes in the way services are offered in those localities.

Practically in every school observed, the so-called minimal normality was implemented. In other words, days established in

the school calendar were observed, teaching personnel started promptly their activities, and time was fundamentally used in learning activities. That distinguishes these from other rural schools where specialized literature has identified a significant teacher absenteeism, besides not fulfilling the established working day.

Teachers' stability and commitment towards the students and the inhabitants of these localities was also a common element in the analyzed schools. On average, teachers worked in the same school center during five cycles, unlike the high teaching rotation that rural communities suffer, where teachers stay just one school cycle on average.

It must be emphasized that multi-grade favors what Santos (2011) names as “circulation of knowledges in the classroom,” that is to say, the diversification of the educational practices through different and complementary proposals; that those knowledges flow in terms of complementarity or different deepening level starting from pooling strategies which allow the students “projecting what has been learned beyond its limits [...], start building bases for future learning [...]; for the students of superior grades, those approaches allow to resume contact with previously addressed knowledges, which enables to reinforce and consolidate bases for the appropriation of current ones” (Santos, 2011:90).

As it can be glimpsed, meaningful experiences developed in multi-grade primary schools combine a series of elements related with teacher training, which allows them planning and developing pertinent activities, contextualized and adequate for each educational level. This favors research and collaborating work, and the exchange of ideas between students, as well as teachers' responsibility and commitment before students and community members, with the aim of staying in schools for several school cycles, fulfilling the minimum normality and supporting external resources management for improving and sustaining the centers. This management has allowed counting with adequate infrastructure, materials, and equipment.

Some interviewed teachers have to face shared problems such as—they concur in pointing out—workloads that imply developing executive tasks simultaneously with teaching ones. There are proven experiences in other nations that discharge unitary teachers from management activities, like

the roles of itinerant principals or the organization of several school centers depending of a central space, which provides a logistical support to settle the numerous administrative tasks. It is needed that Mexican educational authorities decide to confront and solve this situation.

Another essential element that would benefit unitary schools is providing them with canteens that would offer balanced food to the students for free. This action is basic to address the child malnutrition lived at rural disenfranchised locations, besides attending school absenteeism and dropout.

As for training, teachers pointed out the absence of courses, workshops, or seminars specifically developed to facilitate their work in multi-grade classrooms. In this sense, the international experience also indicates that opening spaces so that rural teachers share they own experiences and practices, added to qualification in specific aspects like multi-grade planning and evaluation, encourage the development of meaningful experiences.

Specifically, in terms of students' evaluation, we concur with Santos (2011:89), who points out the difficulty of rendering account of the knowledges learned:

Evaluation mechanisms measure the distance between knowledge taught and knowledge learned, although they are not particularly effective to verify the nature and characteristics of the latter. They even have many difficulties to find the most adequate and dependable learning indicators, resorting to those of applicability and transference, for example. This has the effect that, in general, the evaluation mechanisms are conceived departing from a fantasy which makes them say more than they can say.

Thus, students' evaluation in multi-grade schools should be redesigned and re-conceptualized to consider various experiences, happening both inside and out of schools, which are not necessarily measurable or quantifiable, such as traditional evaluations have been conceived.

As we have pointed out in previous works, the development of actions centered in the schools is not enough. This must be reinforced by health, alimentary, labor, and economic policies that aim to provide a greater social equity and equality in terms of income and social welfare. As long as the

Mexican State focuses its efforts in what happens inside classrooms, it will leave out issues related with the teaching-learning processes that do not necessarily have the school as their stage, but are related with social contexts where equity and social inclusion must be the goals of governmental actions. €

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SPECIAL REPORT: MULTI-GRADE SCHOOLS CHRONICLE

Educated in Nature: A Multi-Grade Experience in the Veracruz Mountain Range¹

With this collaboration from Jay Griffiths, an English writer who narrates her visit to the Center of Indigenous Arts in Papantla, Veracruz—included in UNESCO's World List of Best Safeguarding Practices for Intangible Cultural Heritage—the *Gazette* opens up its pages to the voice of chroniclers in order to observe schools from a different perspective. Today, with multi-grade education historically linked to schools from Italian, English, Hindu, and Latin American indigenous cultures.

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On October 12th, 2015, I was invited to the Center of Indigenous Arts (Spanish acronym: CAI) in Papantla, Veracruz, 300 kilometers east of Mexico City. The Center was celebrating the tenth anniversary since its foundation and promoting decolonized indigenous education.

Hundreds of people, mainly Totonac, a pre-Hispanic civilization, were gathered in a circle covered with flowers with a lit candle. From young children to the elderly, they were all dressed with the care needed for a celebration: Men wearing white cotton trousers and robes, and women in white dresses with flowers embroidered on them. All colors have meaning: white symbolizes purity of thought.

Copal incense weaves the breeze. Banana resin is used to paint shooting stars and flowers on the pottery, which I am told is a sacred work because it comes from Mother Earth. "Every object is charged with hundreds of years of knowledge," says Salomón Bazbaz Lapidus, founder of the CAI.

At the center of the circle, flowers are drawn in a mandala—or path—that explains what education aspires to be. A path of huge, waxy banana leaves links exhibits of each Traditional Home-School—traditional medicine, storytelling, pottery, dance, painting, theater, cotton, carpentry, and even communication media and tourism. Seen as a whole, it represents the path of education "because we are following a long path which has not been conquered."

The day began with a great blessing and continued with speeches of confirmation and celebration of the work at CAI. The path of education must be walked, as they say, little by little: Each step involves community participation, "imbued in dialogues and ceremonies;" every word articulates its own *cosmovision* (world view). "The path is followed with paused movements, listening intently to the grandfathers and grandmothers," says Humberto García García, the Totonac educator.

It took eight years to develop the educational ideas that are now symbolically drawn at our feet. Each item has its meaning: The

green circle represents the natural world, the center of all things. The stars represent each person's special gift. The well rooted trees show us that knowledge must not disappear. And the circular designs illustrate the way in which knowledge is constructed through dialogue, which is also circular. The seeds show the importance of putting concepts into practice —planting an idea for it to grow into a reality.

“The worst thing you can do is to impose,” says Domingo Francisco Velasco, a renowned teacher, “that is the main problem of humanity.” The word in Spanish *imponer* (“to impose”) carries heavy significance and a harsh history. The imposition of the cathedral symbolizes it perfectly —the subjugation of a continent, the imposition of what I call an intellectual apartheid.



Students per three-year period at the Center of Indigenous Arts

Year	Students
2009	423
2012	630
2015	785

Source: CAI, 2016

Current population at the Center of Indigenous Arts

Students	Teachers
541	97

Source: CAI, 2016

Francisco Velasco mentions two regions that knowledge comes from: the great within and the great outside. The language of the land will teach the mind that listens, if we are willing and wise. “Knowledge is here,” he says with his hand on his heart, his face shining, shy and assured. “You have to search deep within yourself to find it, there is already much knowledge in our minds, in our hands, and in our heart,” although the natural world is master and guide. Domingo speaks the language of the river; clean, constant, clear. “In nature there are places where you can find your moment and revitalize it.”

This idea of education goes far beyond the importance of the respect for the culture of indigenous societies: It aims to transmit its unique cultural heritage for future generations. It reaches the very heart of the relationships between humanity and the natural world in order to properly align the relationship between people and nature. We are not speaking of “environmentalism” as a trend or pastime, but as an issue of survival.

The expression of rejection to the imposed imperialist education has a long history. At the start of the 20th century, Rabindranath Tagore established Shantiniketan —an experimental school that is the Visva-Bharati University today, in Bengal—as a protest against the British colonialist education. Classes were taught outdoors, the natural world honored as a teacher. Stories, music, and art were incorporated into learning, not exams. Neither was the business world.

These teaching ideas echo the Forest Schools in the Reggio Emilia system, an educational experience born in Italy in 1945, acknowledged globally as one of the best educational proposals for early childhood, and in the many young radical schools which emphasize the importance of nature and art, and value moral education and teaching of meaning as much as academic work. Meanwhile, the educational philosophy of Jiddu Krishnamurti, Hindu writer, manifested his repulsion of the ways in which typical education of his time served nationalism and the economy, so he taught ethics —human kindness.

Radical education has often focused on similar issues: from Devon to Sierra Nevada, from Bengal to Veracruz, people speak of a common sense of learning of the body and mind that serves all.

The colonized indigenous cultures are not the only ones that know this —not only countries that have suffered from imperialism or slavery, but also any human being who has felt educational stress, cruelty, deficiency, or marginality. The “Dominant Society,” say Arhuaco people of Colombia with true bitterness, “knows little about the world of nature, but a lot about how to destroy it.” At the chore of Arhuaco education there is the sacred duty of keeping the balance of life —protecting nature.

If this is the desired end of the educational path, what steps must we take if we think that each child is unique and unrepeatable? It is a matter of the gift each one has, say the Totonacs —the seed that must be discovered and nurtured from childhood. Effectively, they say, as do many talented educators of the Domi-

In the Home-Schools of the Center of Indigenous Arts, working as multi-grade schools the lines of Totonac identity are transmitted, the practices which shape their world vision —“Kantiyan” (Home of the Wise Grandparents), World of Cotton, Pottery, Painting, Representation Art, Music, Proper Words, Art of Healing, Heart of Wood, Traditional Cooking, Community Tourism, Communication Media and Broadcasting, the Earth, Traditional Dance, and four Schools for Children Voladores in the region's communities.

Student ages at the Center of Indigenous Arts

	Women			Men			
	6 to 12 years of age	13 to 17 years of age	18 to 59 years of age	6 to 12 years of age	13 to 17 years of age	18 to 59 years of age	60 or more
Attendees at the CAI	54	60	76	59	34	34	17
In the communities*	5	36	43	2	37	51	66

* Classes are given not only at the CAI, but also in nearby communities within the Totonac area.

Source: CAI, 2016

nant Society: We must not ask if a child is talented, we must ask which is his or her talent.

According to Totonac tradition, Grandmothers in the sky joyfully throw stars to the children, and the ones that “stick” are their gifts. This idea of the gift is so important that it is inherent to the word “Totonac,” which means “three hearts.” They explain it thus: We need three hearts to know our own gift, to receive it, and to put it to the service of the world. The Totonac tongue is perfumed with metaphors: “Our speech is covered with flowers,” they say.

García García realized his gift was teaching. His first school, he says, was the Totonac culture, including what he learned from the elders in their ceremonies, pottery, and medicine. He went to university and continued on to postgraduate studies in education, and was invited to collaborate in this initiative for rethinking education. He smiles, half sad and half proud: “I have had to unlearn what I learned in university. All my academic qualifications were insufficient when facing what I had to do here.” He speaks of sadness, confusion, and fear, but also of how the collective pain became a journey of discovery to open up their truth to the world. With the intention of letting in the glimmering words, he says softly: “What we share is at once reality and metaphor.”

There are few more dramatic examples of the teaching of mystery than that of the *mamos* (priests) of Tairona, in Colombia’s Sierra Nevada. The Kogi, Arhuaco, Wiwa, and Kankuamo peoples are descendants of the Tairona civilization, and their *mamos* are educated for this role from early childhood. Young apprentices are taken to live in a dark cave and are not allowed to see the light of day or the full moon. They are taught songs, myths, and the ancient ritual language of the *mamos*. Nine years go by.

Then the deeper training begins: Another nine years in darkness, learning the knowledge written in stones, forests, lakes, and mountains, hearing about the Great Mother, studying divination, meditation, and the sacred duty of maintaining the balance of the natural world. They develop their insight at the price of sight. The gift of vision is given in darkness. The inward eye intuiting the mysterious before seeing the material.

But the Arhuaco people realized their material world was being stolen as *mestizos* repeatedly cheated them in transactions that resulted in the Arhuaco losing their land. They decided their education needed something extra. Training in business, accounts, purchases, sales. So, in 1915, the Arhuaco asked the Colombian government to send them teachers for learning Math and written Spanish.

The government infamously twisted the request, sending in Capuchin friars who prohibited indigenous language, called their cultural heritage “devilish” and “heathenish,” and enclosed children in a school that was called “the orphanage.” Friars fined the children for every word they spoke in their own language (the price was 10 cents a word, in the 1930s) and taught the children, the Arhuaco say, “nothing of value.” The Arhuaco rid themselves of the friars only in 1982, literally drumming them out, surrounding the mission buildings, singing and dancing with accordions and flutes so the priests couldn’t get a wink of sleep. When the Capuchins left, the Arhuaco set about transforming their education system.

What do you get if you decolonize education? The best of both hemispheres, it seems. One Arhuaco initiative, the Indigenous Educational Center Simunurwa, set up in 2007, includes numeracy and literacy in its syllabus.

They use mobile phones and radio stations to communicate with international human-rights organizations. They use their own language, stories, art, rites of passage, spirituality, music, and law. The input of the elders is vital, and rivers and fields are classrooms. Indigenous cosmology is taught alongside Western philosophers, while certain plants are considered teachers, as they are across the Amazon, in diagnosing sickness as well as treatment, and Arhuaco *mamos* are grief struck because certain plants have “vanished without even leaving us traces of their knowledge, of their teachings, of their healing properties.”

Back in Papantla, in Mexico, Lapidus sweeps his arm protectively around the CAI—which has been awarded a UNESCO award and is included in the List of Best Practices in Safeguarding Intangible Cultural Heritage. The plaque itself is decorated with vanilla stems.

The Center of Indigenous Arts has professors such as Juan Tiburcio, a poet, visual artist, potter, and embroiderer. His book, *Xlatamat Jun / La vida del colibrí* (Life of the Hummingbird), published by the CAI, earned the Ostana Award in 2015 in Italy, in the category “Mother Tongue Literature”. On her part, Martha Soledad Gómez Atzin cooking teacher, is a member of the Diplomatic Corps of Chefs of the Ministry of Foreign Affairs (SER). Among the students, there are cases such as Víctor García Castaño, a *volador* with a degree in Education, who earned the State Youth Award 2015 and is Coordinator of the project State of Social and Economic Development of the Totonac Region (Spanish acronym: EDESRT), which is conducted together with the National Autonomous University of Mexico; and Zaira Simbrón Vázquez, teacher of the House of Pottery for seven years and participant in international residencies.

When the healer Francisco Velasco speaks of the best kind of education, he applies it widely: “This wisdom is not just for indigenous people but it should be universal.” “There is a reason why we live on Earth,” says the teacher García García, “because each of us has a service to perform, a gift to develop in life to reach the light and to give it as an offering. It is blessed.” A green thought in a green shade, true education reflects qualities of life itself—it is generous, generative, diverse, and creative.

Rabindranath Tagore’s philosophy strongly influences Schumacher College in Devon, UK, and visiting there recently I met Martin Shaw, its mythologist-in-residence. If I played Fantasy Cabinet, I would make Shaw my education secretary. He calls himself a storyteller, although I would call him a story-doctor, using myths to heal. “Stories are a sharp knife,” he says. Stories are revered as teachers of true stature all over the indigenous world; when encoding ecological knowledge or ritual significance, they can caution and deftly caution, stirring conscience without causing shame, and they can also comfort.

He mentions the Gaelic tradition where educational stories were called the “swan-feather cloak,” and “every moment of your life should have you clothed in stories.” Without this, children feel unsupported and isolated. “What I see around me is children with a

colonized imagination. They don’t suffer an attention deficit,” says Shaw, “but a deficit of images that arrest the soul. Once you provide them, you are in the business of real and true education.”

“Name something,” I ask, “that is important for children to learn.” He responds: “Manners.” I smile, leaving a broad pause.

“They need to learn to be valiant. The kind of education I want results in affecting their relationship, as adults, with the earth, so that in time we move from a society of taking to a culture of giving, a society of relatedness. I want them to believe that if they don’t say an inventive prayer, the Moon may not come out. That they know they are a little part of an ecosystem that, for a few years, glimpses itself through human eyes. Inventiveness is innate in children—it is not hard to provoke a courtship culture, to speak Firebird language.

I hear it. I know it. I honor it.

The furious sensitivity of Romanticism is here, fiercely kneeling in the presence of the natural world; not as a rose-colored moment in cultural history, but as a perennial and necessary aspect of the human psyche. And children are great Romantics. “Romanticism is activism,” says Shaw. “And in children it is essential, it is not an indulgence. This kind of education is so basic, it’s like rediscovering fire.”

Meanwhile, in the Sierra Nevada, after 18 years of creating a world in darkness, through the imagination alone, one morning the young *mamo* is led out to see his first sunrise. The image he had painted in his mind, no matter how bright, will be dimmed by contrast. The world of his thoughts, no matter how generous, will be meanly bleak in comparison. The picture he had made will be sad and poor beside the spiraling, splendid world, its transcendence finally and truly contemplated. The shock of rapture. Dazed by beauty and amazed by light. This is a sight whose splendor leaves him awestruck for life: To see the radiance of the divine Earth and to know it holy. €

¹ With information of the Center of Indigenous Arts (CAI) of Papantla, Veracruz



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To learn more about the Center of Indigenous Arts: <https://goo.gl/xt1YL2>



<https://goo.gl/wHLJOx>



To read more about Jay Griffiths: <http://www.jaygriffiths.com/>

SPEAKING ALOUD

Specialization in Policies & Management of Educational Evaluation: Development of Institutional Skills for Evaluation

The development and promotion of a culture that takes evaluation as a fundamental decision-making tool is a necessary condition for educational improvement, hence the need to initiate a collaboration which allow to strengthen the capabilities of those who participate in the National

Educational Evaluation Policy. Gómez-Morin and Rubio Almonacid explain the strategy.

The 2013 Educational Reform, which marked a departure point for the consolidation of an educational evaluation culture in Mexico, generated the emergence, modification, or ratification of players. Also, since that same year, the Latin American Social Sciences Institute (FLACSO) in Mexico has collaborated with the National Institute for Educational Evaluation (INEE) in several research projects. This initial cooperation developed a national inventory of institutions and organizations dedicated to educational evaluation. A year later, the evaluation of institutional capabilities in those areas re-

sponsible for educational evaluation in state governments took place. The results of this work made visible the existence of institutional deficits to confront the challenges of the reform, especially in terms of educational evaluation. One of the most critical gaps in this area encompasses the management capability of all actors and evaluation processes (students, schools, teachers, educational materials, syllabuses, and system), as well as the design of intervention strategies for improving educational quality.

These findings, together with other international and national studies, required designing a strategy to promote and strengthen the qualification and professionalization of the National Educational System (SNE). This was consolidated in one of the two transversal axes of the National Educational Evaluation Policy Guiding Document (PNEE), “Strengthening of

Institutional Capabilities,” and in specific, although not limited to it, in the Line of Action 4: “Studies for the Diagnose and Development of Institutional Capabilities”.

It was in this environment that the Specialization in Politics & Management of Educational Evaluation (EPYGEED) at FLACSO and the INEE was born; it constitutes the first effort, at a national level, and with state-level impact, to promote and strengthen the institutional skills of those teams—both in the federal administration as well as in the states—which will allow to achieve the Reform’s main goals.

To approach the aforementioned process, the current document includes a brief recount of the normative and institutional context in which the PNEE is implemented, as well as the content, structure, and learning strategy of the EPYGEED and some conclusions.

The 2013 Educational Reform and the PNEE Normative and Institutional Context

The 2013 Educational Reform granted autonomy to the INEE and, according to the articles 11 and 12 of the Institute’s Regulations, it consolidated the National Educational Evaluation System (SNEE) as:

An organic and articulated set of institutions, procedures, instruments, actions, and other elements contributing to the fulfillment of its purposes, with the goal of contributing to ensure the quality of State-provided educational services and those offered by particulars with an official validation of studies.

The SNEE is the instance responsible of ordering actions and mobilizing actors to implement the PNEE, which is a part of the inherent strategies for improving compulsory education’s quality and equity. Thus, it is about generating conditions that contribute to the Educational Reform placing children, and youths, at the center of governmental intervention.

The PNEE clearly defines the evaluation’s objects, methods, parameters, instruments, and procedures; the guidelines resulting from the evaluation processes; the quantitative and qualitative indicators; the evaluation results’ dissemination mechanisms; the evaluation of the different components of the national educational system (students, teachers, schools, course contents and syllabuses, policies, and programs), as well as the evaluation

scope and its consequences. Besides, like any other public policy, it has the goal of managing goods, services, products, and normative changes which contribute to lessen, solve, or resolve public issues through addressing the root causes which have given rise to socially undesirable situations.

The SNEE is a complex system due to the number of actors, components, and relationships which form part of it and its intricate interdependence network³; thus, the challenges for the PNEE implementation require the presence of individuals and collectives with institutional capabilities to manage all the necessary, and sufficient, products, goods, services, and agreements. Having institutional capabilities means to possess a potential, and proofed, condition to reach a set goal and ensure quality education as a human right that every Mexican can exercise.

To achieve an efficient and effective management, the governmental (at a federal and state level) and social actors count with a normative framework that founds and regulates their operation. Nowadays—unlike the context in which the EPYGEED started—there is an institutional scaffold (to a large extent built by the INEE) with the purpose of generating conditions of technical and normative feasibility and viability to manage effectively the PNEE implementation, namely:

- PNEE Guiding Document;
- SNEE Medium-Term Program 2016-2020;
- State Programs for Educational Improvement (PEEME);
- Guidelines and directives;
- Model for the construction and issue of directives for educational improvement;
- Integration of INEE Departments in the states;
- Studies and research on the matter.

EPYGEED Curricular Content and Structure

The existence of Institutional Capabilities Deficits (DCI)—as well as deficits involving normative, technical, context-caused, political, budgetary, and educational issues in the teams responsible for the evaluation—is a common denominator within the local contexts in which the PNEE is implemented. Besides, the strengths, weaknesses, opportunities, and threats for managing this policy are asymmetric in each state, which establishes different challenges and gaps at the levels of

financial, normative, institutional, technical, and operational viability and feasibility. To this we must add the dynamics and permanent evolution of political, economic, and social contexts (both at national and state levels) which affect the implementation process itself, and which are different in each of the governments involved.

The EPYGEED elaborated its curricular design starting from these previous considerations.

The Specialization Program seeks for students to develop traineeships and institutional capabilities (individual and organizational) which will allow them to face—effectively and successfully—institutional and normative obligations in terms of educational evaluation. For that, the EPYGEED considers the following principles as guides for educational evaluation:

- The purpose of every evaluation is to improve educational quality and equity;
- Every evaluation must be an opportunity to evaluate equity in terms of supply endowment, educational process conduction, and results;
- Evaluations must only guide decisions which will have justice as their final result;
- Recognizing, appraising, and attending of diversity;
- Participation.



This on the understanding that educational evaluation management is the institutional capability which allows:

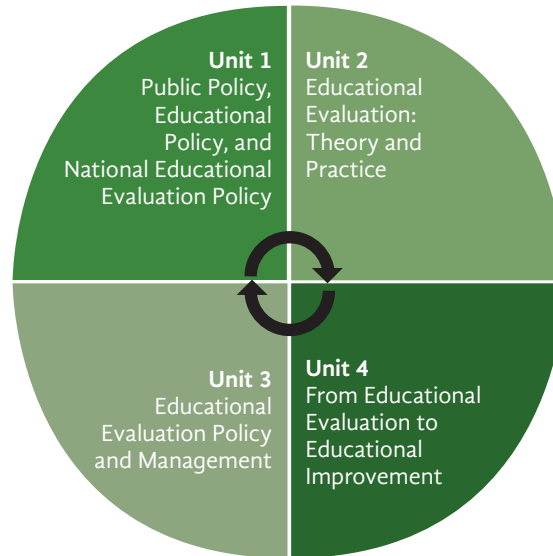
- Institutional coordination for the comprehensive development of evaluation processes;
- Effective dissemination of educational evaluation results;
- The design and launching of educational interventions-educational policies and programs-pertinent and contextualized for the improvement of educational quality;
- The development of programs and actions to accompany, advise, and reinforce the work of teachers and administrators, especially for the operation of the School Technical Assistance System (SATE);
- Management to improve the conditions in which school life is developed;
- Attention to the context conditions which prevent school access, or adequate students' performance inside schools;
- The development and enhancing of a culture that considers evaluation as a fundamental decision-making tool that influences educational improvement, comprehensive assessment of the educational system's quality, pedagogical betterment of schools, and a timely and transparent accountability.

Thus, the EPYGEED has the general goal of encouraging the formation and professionalization of directive and operational teams involved in educational management of educational systems both at the Federal and State levels, following the axes of public policy and management in the area.

The specific goals are:

1. To promote the use of educational evaluation results by educational servants for the improvement of basic and middle education schools' quality in Mexico.
2. To develop public servants' skills for governing and managing the educational evaluation through promoting collaborative and multidisciplinary work modalities.
3. To develop, in educational system's servants, management skills oriented towards results, leadership, lobbying, negotiation, and conflict resolution which allow transforming the academic-professional experience of participants.

EPYGEED Units



Source: FLACSO, Mexico. 2016.

Transversal Axes of the EPYGEED

For an ideal development of institutional capabilities, the Specialization Program is shaped by five transversal axes.

1. Approach towards education as a key—or hinge—human right, since its fulfillment guarantees a better exercise of all the other human rights.
2. Public policy on education, with an emphasis on the cycle of public policies from the perspective of educational evaluation.
3. National Policy of Educational Evaluation, with an emphasis on its development and evolution towards the current model.
4. Educational management, with an emphasis on the structure, organization, operation, and governance of the educational system and its relationship with educational evaluation.
5. Improvement of educational quality, equity, and inclusion, with an emphasis on information management, communication, and building of educational improvement routes.

These axes are approached from three analytic perspectives and four practical dimensions:

Analytic Perspectives

1. Analysis of public policy and management.

2. Global and Latin-American Comparative Analysis.
3. Analysis of the national education system management in the Federal and State spheres.

Practical Dimensions

1. Skills for evaluation management, academic leadership, lobbying, negotiation and conflict resolution, as well as building agreements.
2. Skills for blueprinting innovative strategies for attending students, teachers, schools, and the educational system, from the basis of the analysis of educational evaluation results.
3. Skills for the communication of educational evaluation results and of the strategies designed for educational improvement.
4. Skills for social mobilization and governance in the improvement of educational quality.

The aim is for the development of these thematic axes to keep a balance between analytical perspectives and practical dimensions in such a way that the contents to develop will be intimately related with the reality of the Federal and State educational administrations.

The axes, practical dimensions, and units are articulated and interdependent to gener-

IN THE CLASSROOM

Federalism Concerns Us All: Challenges from Our Trenches

“Everyone must be committed and know what actions concern each of us”, says **Saraí de los Ángeles**, primary school principal in San Luis Potosí. But who is ‘everyone’ and how do they perceive educational evaluation? What is their concept of educational improvement and how do each of us work to achieve it? Here is an example through different voices.

What view would we have if we listened to the testimonies of those who do not design public policies, but put them into action? This 6th edition of the *Gazette* portrays the words of some of these actors, who are a part of the school collective. Some, public servants and members of civil society organizations; others, people whom we have asked about what they do from their trenches to contribute to improving education in Mexico.

How Educational Quality Is Perceived

For Aranza Vázquez Galeana, a sixth-grade student of the Full Time Federal Primary School “Ejército Mexicano,” in Acapulco, Guerrero, “educational quality is a school where teachers are very well trained; it is parents helping children to study and do their homework, students having values, like honesty, punctuality, empathy, responsibility. A clean school, safe, and in good condition, where children are happy.”

“I had the experience of studying in the United States and here in Mexico,” says Treisy Valeria O. Romero, 16 years old, a student in 5th term of High School No. 6 of the National Autonomous University of Mexico, “and the support of teachers is very different; in many cases, that makes a whole difference in learning.”

“Here in Mexico, there has been a shift towards improving and motivating teachers. One of the major challenges is to get

ate *continuity and articulation* in the learning of concepts and central themes related to the educational process.

As a result of this structure, in their final work students offer specific governmental actions to manage, in a pertinent way, the state-level implementation of the PNEE in articulation with the Educational Improvement State Programs (PEEME), and the projects that states will define with the backing of INEE.

EPYGEED Learning Strategy

The EPYGEED Learning Strategy’s purpose is developing and consolidating skills to analyze and reflect upon the new institutional/normative context in which state governments manage goods, services, products, norms, and institutions, so the educational evaluation contributes to generate conditions of equity and equality.

Thus, the blended graduate course integrates learning ways which include creativity and innovation, as well as collaborative and allocated work. It is not just about incorporating technologies in the teaching-learning process, but also to bridge the gap between those abilities taught and those required for potentiating innovation and creativity in order to offer proposals for solving educational problems.

By Way of Conclusion

Specialized literature indicates that human and financial resources are key in the implementation of public policies to generate profound changes in the states². A greater efficiency and efficacy presupposes the existence of adequate budgets, professional equipment, and pertinent normative frameworks to advance in the solution of public issues associated to social wellbeing.

Therefore, governmental actors proofed—and potential—possession of institutional capabilities is decisive to design and implement public policies related to educational evaluation with efficiency and efficacy. Furthermore, it should be highlighted these policies have a functional temporality, they can’t be permanent; and, because of it, they must be continuously developed.

The aforementioned Institutional Capabilities Deficits (DCI) may prevent public servants’ teams responsible of implementing the PNEE carrying out quality, sufficient, and timely-delivered production of goods, services, and normative changes in order for

this governmental intervention to contribute towards an educational policy that faces in an effective way the causes which hinder the exercise—for all Mexicans—of the human right of accessing a mandatory education of quality.

Finally, there is a need to further deepen the reflection about making diagnostics to identify which is the developmental level of normative, political, organizational, and technical capabilities so that governmental organizations respond in a pertinent and efficient way to the challenges of each one of the PNEE Cycle Stages. €

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- ¹ Tarride, M. (1995). *Complexity and Complex System. História, Ciências, Saúde - Manguinhos, II* (1). Mar-Jun. pp. 46-66.
- ² Luhman, N. (2002). “Lesson VII. Complexity,” in: *Introducción a la Teoría de Sistemas*. Mexico, Mexico: UIA. pp. 179-206.
- ³ There are diverse approaches tackling this issue, among them stand out those of public management (Atrio & Piccosso, 2008), results management (Cunnil & Ospina, 2003), civil service quality (Longo, 2002, 2004, 2005), public service professionalization (Longo and Ramío, 2008), human capital (Atrio & Piccosso, 2008), states’ institutional capabilities (Longo, 2002, 2004, 2005), functional capability (Echabarría, 2005), or the knowledge, abilities, and skills public servants require to define or adjust a course of action (Chespi, 2013) in the states’ structures where public policies are designed, implemented, and evaluated.



Would you like to know more about the EPYGEED? <https://goo.gl/U5nRIC>

teachers to do what they know now, after the Reform,” says Saraí de los Ángeles, principle of the primary school “Juan de Villerrías” in San Luis Potosí, “because they are the pillars and foundation of our education.” With respect to the challenges we face as a country, the main thing is to make laws and agreements be enforced for all involved actors. To motivate teachers who have already been promoted to continue professional training without removing the rights they have already earned, to involve parents, and try to make improvements in evaluations.

“If we receive quality education, it helps our future, because we develop our mental skills. We also need to evaluate teachers, to see if they teach properly; and to evaluate different schools, and the kids in them, to see if they have learned what teachers have taught them,” says Adrián Duño, 13 years old and a student in second grade of *Telesecundaria* 101 in Hidalgo.

“Teachers must work, learn their plans and programs, apply the theory to everyday practice; they must plan according to the context, and above all, be autonomous researchers who know which strategies and techniques are the best for their group. They should have a humanistic approach,” says Saraí de los Ángeles.

“I think evaluations are a good thing because in this way teachers can see how we are improving in our learning,” mentions Aranza, “and then they strengthen their knowledge and the way in which they teach us and explain things.”

How Is the Evaluation Perceived?

“I have heard about the Educational Reform. It has been very demanding. With respect to teacher evaluations, I think it is good because it is a parameter to know the level teachers have, that they have to improve to teach better. I also think higher positions above teachers should be evaluated too,” says Claudia Guadalupe Huante Sánchez, architect and mother of three children at school age, from Acapulco, Guerrero.

“We have to evaluate teachers to know who we are doing as students, and I think it is also important because we need to see how they teach,” says Treisy. “Teachers are the ones who have to guide our learning and knowledge. Quality and sufficiency should be evaluated in both the infrastruc-

ture, and the facilities and materials. If groups are very large, teachers can’t attend to everyone.”

What Challenges Are Observed?

“I would like them to enhance our writing skills. I think education should prepare us to develop properly as professionals. It is the basis for us to look for work later on. Something we need is to be taught how to ‘learn how to learn,’” says Treisy.

What Is Done to Contribute to Improving Education?

Saraí de los Ángeles remarks: “Activities are carried out every day with the parents; without their support the school will not grow. It is important that they are involved. There must be shared leadership, we must be informed of the work in the school and the classroom, with continuous professionalizing, and above all, an understanding of the context and promotion of professionalizing through the values we have as people. We need teachers who are not only trained in education or with a university degree, but who also have vocation and professionalism.”

Evaluation for Improvement

“Educational evaluation motivates teachers to become better every day, especially because one does not have to wait years in service in order to be promoted, it is instead a matter of the desire to train every day,” says Saraí. “I propose that it should be a fair process, that those who evaluate us and prepare the exams are not only certified, but also know what they are evaluating. The evaluation should also be applied to students; to evaluate is to improve. It is a collaboration. This is not only about winning something, but also about knowing what skills we have to strengthen as teachers.”

Mexico in Ten Years

“In ten years I see quality education, great progress that will be owed to the efforts and professionalism of every teacher, where everybody does their work and becomes involved in their area. I would propose that significant professionalization should take place, that evaluations take place in a timely and correct manner, and in more schools, but with an improved infrastructure. I am going to involve the government —higher funds to the education sector distributed equally.”

“If I had the opportunity of directing an education system, I would propose that teachers occupying the classrooms, regardless of territory, must love their work. They should not be prepared for one evaluation, but for every day. Parents should be involved not only for payments, but also in meetings and workshops. Many know a trade or craft, so they should teach children about what they have in their region.”

Participation of Other Agents: What Corresponds to Each?

“An important function of the departments of the Institute,” says Manuel Jorge Alberto González Montesinos Martínez, Assistant Director-General of the National Institute for Educational Evaluation (Spanish acronym: INEE) in Sonora, “is to work in coordination with the state education authority in general. We have to enhance the personal talent of teachers and promote the development of their learning skills. Social citizen participation is essential for schools to succeed in their mission. Now, we also have to strengthen another aspect, the administrative and academic management of all educational institutions.”

Evaluation for Improvement

“Evaluation has always been present in educational processes,” mentions Manuel, “but it is now starting to be seen as a tool for improvement. Without forgetting that these evaluation processes have to have a human treatment. A member of our Board of Directors said, ‘teachers do everything they can with what they have within their reach in this country.’ That is a very clear and fair view. So, with systematic information from their local contexts, they will do much more.”

What Actors Should Participate: From Local to Federal

“We need a combination. We need more participation from local educational authorities. We have already entrusted a lot to the teachers. We need to stimulate supervisors, technical teaching advisors, as well as the Technical Assistance Service of the School; we need to help in making them consistent and recognized as important figures. We need to think of school collectives. Another actor with a great stake in it is the private initiative,” mentions the Assistant Director-General of INEE, Sonora.

On her part, Consuelo Mendoza García, President of the National Union of Parents,

says that “one of the greatest challenges is educational quality. There are still many shortcomings. Often, teaching and instruction is confused with education—it is not enough for a child to learn Math and Spanish, and to read properly, in order for him or her to receive a suitable education. Education must be comprehensive, which includes learning to live, to be happy, to have ethical and civic values which permit coexistence and building the country in the future.

A very important subject is teacher training. Teachers’ schools need to be renovated, and their student curricula should be adapted to the times we are living. There is a need for a deep reform. One challenge is parent participation; to see them be truly active in school. That is part of the purpose of the National Union of Parents, our motto is precisely, ‘For my duty and for my right.’ The right we have as the first educators of our children, which was not recognized for many years. Another issue we are working on and consider to be very important is educational freedom, which rarely exists in Mexico.”

How to Face These Challenges?

“Not all parents,” continues Consuelo, “know that they can now give their opinion about contents, that they can be on the Social Participation Council, and that their role is much greater than merely organizing the Children’s Day or Teachers’ Day fair. They can also supervise the running of the school, participate, and support directors and teachers in different activities. That is already stipulated in the General Education Law.”

Evaluation for Improvement

“All individuals must be evaluated to perform any duty. At all levels we need to meet a standard. But it is also important to provide the teacher with all the tools to keep updated and compete properly in these evaluations. There needs to be a greater communication with authorities. Maybe the problem is that this communication takes place through syndicates, and this should be more direct, so that evaluation is understood as an opportunity and not a threat. Teachers work with the hearts, and the future, of children. Who does not hold in his or her heart the memory of a teacher who gave us the support we needed to become a better person or a good example? It is also very important for teachers to know the work of the INEE.

Evaluation: From Local to Federal

“Federally there needs to be support and organization with the teachers, but it should favor decentralization, because the requirements are not the same in a school in Yucatan, or one in Toluca, or in Chihuahua. Programs should be proposed according to existing needs; and above all, work should begin on the autonomy of schools,” remarks Consuelo.

Mexico in Ten Years

“It is also important to *depoliticize* education, because this moves other interests than the ones it should. For education to advance, it must be the cross axis of all public politics. As long as education does not advance, Mexico will not progress,” says the Chairwoman of the National Union of Parents.

Present Challenges in Mexican Education

Leonor Elizabeth Sibaja Domínguez, Chiapas supervisor, says: “It is possible to reformulate federalism as long as there is a will not only from the national education system, but from the three branches of government. This will allow us—from our trenches—to take back our political autonomy.

“I take great satisfaction in the existence of social participation school councils. They have a list of activities and workshops that can be promoted within each school, because they are made for community outreach.”

Our Contribution for Quality

“Educational quality lies in us supervisors being present at the schools. I had the opportunity to be in several, to see the parents, talk to them, introduce myself, learn about their needs, and take note of how many things we could do together, even if we didn’t have the support of the municipality or of any established program. Sometimes we tell them we are migratory birds. Today, we are here; tomorrow, we are gone. That is why we must leave a mark.”

On the Road Towards Improving Education

“The figure of directors and of supervision are triggers of success. Teachers have the key element, they have the full authority of teaching, and we have the role of advising and supporting; therefore, we must do so appropriately and effectively.

“We must strive to make learning divergent. With respect to the educational system,

there must be a better budget allocation regarding use and equality for schools. We must assume our responsibility as public servants, because in many cases we want to take charge of things that are not ours. We are at the service of a country, and above all, of children,” observes Leonor Elizabeth.

Viewpoints and Actions from the Civil Society

Nashieli Ramírez’, general coordinator of *Ririki Intervención Social*, tells us: “We are an organization that works for the defense and guarantee of the rights of children and adolescents. Everything we do is to influence the public policy agenda in favor of this population in our country. We are very active in the incorporation of the General Law for the Rights of Children and Adolescents, and its regulation.”

Envisaged Challenges in Mexican Education

“There are essentially two. The first is inclusion. The second is related to the challenges of inclusion in terms of the relevance of schools. The challenge of inclusion, which is



generally not discussed, is towards a new context in which schools and education have to struggle for relevance, not in utilitarian terms but, rather, in terms of how they are learning, what they are doing, in what world, with what speed, and what other instruments and logics are included. Another major challenge is bureaucracy.


“Essentially, we have a system that was created on the basis of a vertical logic. I believe there is a great lack of sensitivity in this. Investment in the local, from the bottom upward, is achieved in how you transform the school community. And in this respect, one of the key actors are the people.

Evaluation for Improvement

“The evaluation is pertinent to any process with a third party, which in its essence implies a transformation. You have to be able to measure whether you are doing it right or wrong. Some receive the evaluation as mainly punitive, and not as part of an educational process.”

Contribution from the Civil Society

“Today, there are many organizations, collectives, and movements that are trying to make a difference. The system is still in crisis and it is starting to try to overcome the public opinion. It is very important not to think of these organizations and civil society as a homogeneous entity, because they are reflections of heterogeneity, as is society. Also, we must not be simplistic and assume that everything the State does is wrong, and everything the organizations do is good. Federalism is that point in the middle, where things can be achieved, especially in a country such as ours.

“The public issue of schools is an issue that will continue to be strengthened, along with society, ten years from now; and in this, no matter what, civil society will continue to make a contribution,” concludes Nashieli. 

Interviews: Magdalena Alpizar, Mary Carmen Reyes, Lizbeth Torres Alvarado

¹ Members of the INEE's Educational Evaluation Social Consulting Council (Spanish acronym: CONSCEE)

Gazzete thanks to Jorge Sotelo Cortés, from the Communication and Planning INEE's Unit and Ririki, for their support to enable this series of interviews.

DOSSIER: FOUR DEBATES WITHOUT A PASSPORT

Ecuador: National Evaluation System, an Organizational Axis for Educational Policies

Given that national public education policies define the model citizen of the following years through various instruments, the author calls for social commitment in the construction of a national evaluation system to serve as a line for dialog.

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The institutional union of autonomous entities joined by a common goal is not an epiphany, but a decision based on social actors capable of uniting and also of separating. The above statement seemed to have lost validity in present reality, until the recent decision of the United Kingdom to exit the European Union (EU) making use of Article 50 of the EU Treaty regarding the rights of Member States (UK Government, 2016).

As in most elections, the search for wellbeing is a powerful motor that fosters the creation of conceptual and regulatory frameworks. Its development lies in clarifying the degrees of freedom needed to make autonomous decisions and at the same time give certainty and significance to the *Union*.

Because of the rationality of this decision, each entity wishes to maintain its authority to act in response to internal challenges, for which purpose they create, articulate, and enforce their laws, while at the same time managing their own resources (Soldatos, 1990). However, members of a federation also search for an identity that represents them all and groups them in an archetype providing a superior status that promotes the first person plural.

From these ideologies, it is necessary to review a premise that has shattered the con-

cepts of freedom and property in their most liberal expressions: It is possible to develop high prosperity levels based on a more equitable distribution of resources.

Although it is true that the possibility of social wellbeing is defined by an improvement in the conditions of individuals, this is not less true for a society to enjoy prosperity in its various facets; collective values, freedoms, and states of satisfaction must be shared in order to minimize friction between groups and individuals based on historical privileges and deprivations, especially if these gradients coincide with the borders of those territories which have decided to integrate.

Freedom to design social rules is intimately linked to the idiosyncrasies of individuals and their context. To rely on the *Union*, conditions must be created that shorten the gap in the access to guarantees proclaimed by the federation. But this is not enough. The services provided by the State must serve similar spheres and meet minimum standards to permit sharing the new space that has become common.

In this sense, one of the pillars of democracy that is most difficult to coordinate is the quality of public goods and services, without threatening the sovereignty of the entity. Of course, this is not a simple example of conflict, but a repetition of our history, where public policies termed national are often seen as threats or interventions when they are not developed locally. This not only undermines such policies themselves, but also the governance which must be upheld by every federal power.

Facing this dilemma, a reaction towards the government system is frequently observed from all actors. Once this reaction has been triggered, there is a very strong urge to name and activate the law in order to take position instead of placing common interests at the core.

This confrontation strengthens the idea of excessive regulation, and this is how the impression of national interests above local interests is installed, making it almost impossible for public policy to permeate positively into the sector where its implementation was intended. This is when its generalized rejection begins.

In the educational environment, this senseless dynamic is frequently observed

mainly due to overlapping of ethereal concepts such as “the recovery of State agency,” or “the right to local autonomy,” both with communicational impact but a very low level of action, because these environments are clearly defined in the Constitution.

The above fuels the three most frequent acts when promoting failed national policies:

1. Confusing initiatives (ideas) with regulations (obligations).
2. Promoting ideas departing from the obligations.
3. Advancing only with those who have the will (allies) and not the ones who can execute (capable).

As in every complex system, the federation is structured on different levels of power operating at various interwoven—and not linear—scales, though nodes of power connected by interests. In this way, the National Educational Policies (Spanish acronym: PEN) delineate the model citizen that will exist in the following years, by means of various instruments, some less prescriptive than others, but all with strong integrational components.

When the interests of one entity are

placed above the federation, ideological conclusions will most likely lead the decision spheres to such a degree that any proposal will be judged exclusively for its origin, and not its value.

In view of this challenge and the size of its impact, a discussion about the specifics of a PEN is natural. Nothing should be left out, but once agreed upon, there must be a National Evaluation System that is objective, transparent, and reliable, with a line of work that revolves around rating the achievement of the major agreed goals and a strong vocation for enforcing the accountability of all Member States through an interactive monitor with national standards and benchmarks.

Of course, cohesion between entities based on different evaluation initiatives demands a strong culture of collective imagination—closing the educational gap implies that all citizens consider it valuable to have the same probability of exercising their rights in the future. It is also necessary to have developed a deep sense of the obvious in order to conclude that this implies giving away privileges, being less unequal, and aiming towards a nation where every inhabitant has the same opportunities.

In order to accomplish a PEN that could be called effective, a process must be established which guarantees the flow of ideas between potentially skilled actors, so that they may become allies of the initiative.

Regardless of the circumstantial details, the available times, or resources, the cycle of Precursors-Development-Impact-Prosperity, as a value chain, must be fulfilled, with its communicational parallel, and conducted towards a virtuous cycle that incorporates various agents, actions, and rating exercises.

Diagram 1 shows a model with the minimum flow needed to create the desired circularity. As can be seen, the precursors are based on three different spheres necessary to build a bridge between the PEN and its local implementation. A *sine-qua-non* condition is to ensure the financial viability of each entity and that this will not affect its socio-economic environment in the short term.

Moreover, the PEN must be placed at the center, not the governments or their positions, and political consistency must be achieved beyond the line of the predominant discourse.

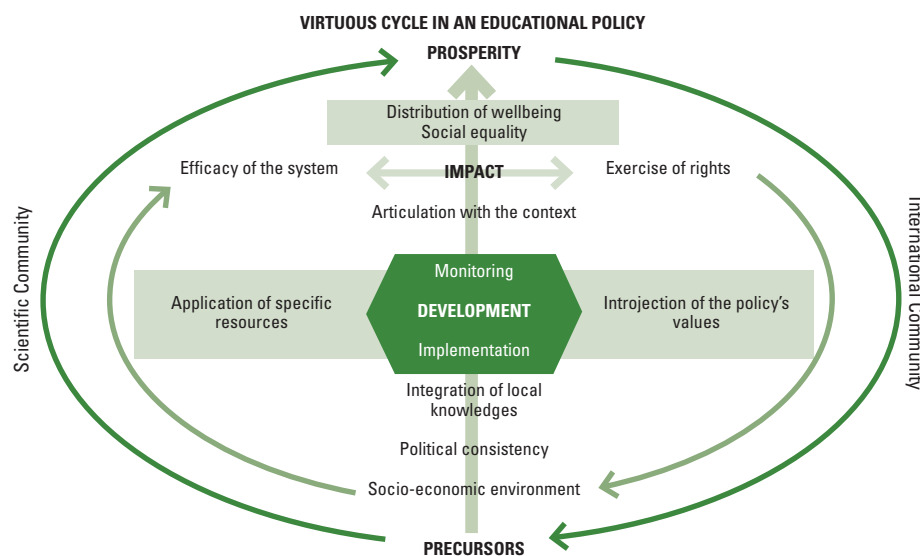
In governments, one of the most frequent mistakes is to place the PEN as the critical subject, so that it becomes its own motor. It is simple to deduce that if it is still in the acceptance process, diminishing yields will occur faster than the multiplying effect it may achieve, and therefore its value will be subject to its discursive effect and not the magnitude of its impact.

Hereupon, it is relevant to understand that national institutions “become centers for decision-making and conflict solution between the different levels of government” (Ayala, 2014), especially if the PEN promotes radical transformations along the paths of society, or if it disrupts relations between powers.

We recall that the State “is not an aggregate of neutral interests of identities, but rather it represents a crucial form of social, political, and economic creation, as well as cultural results” (Lecours, 2007).

In this sense, national systems have been created to balance the initiatives of the central government and modulate the implementation of legislative agreements. However, national educational policies appear with different signifiers according to the time and context, making it necessary to minimize adjectives and prioritize contents in each case.

Diagram 1. Minimum Flow Needed for an Effective National Educational Policy



Source: Sánchez, H. (2016). PDIP Cycle. Management of Educational Systems.

Thus, during their development and socialization, there are two strategic actions that must be implemented concurrently:

- 1) Presentation of how specific resources should be collected and applied.
- 2) Introjection of the values of the PEN within the territory, given that its function is to regulate, boost, and design spaces of social interaction in order to interconnect the context in which the transformation is intended.

By definition, a PEN must have a visible impact on various levels. However, there are two essential areas: The efficiency of the system, and the exercise of rights, because all public policies are a network of rules that modulate all efforts made to reach the goals of development.

Therefore, at the core of an educational PEN there must be easily observable guarantees of the rights to—and in—education, a fact that can be broadly accepted, but whose application implies more than just positive statements.

A question arises here: What gravitational center can draw political actors, with

different agendas and different powers over the same population, to accept a PEN? The only answer is a shared prosperity. That is, the potential to have the same possibilities of access to services of the State and enjoyment of wellbeing in the entire national territory; it is not enough to see it at a State level.

The above statement is utopian, but not naive, and its feasibility depends directly on the National Evaluation System, as the articulation of its results with those of the States allows local policies to be developed based on national evidence and benchmarks.

Two communities play an important role in this cycle: the scientific and the international communities. The first places the relevance of each phenomenon and provides technical solvency and support in its creation and implementation. The second oversees the accomplishment of goals, and their sustainability in the medium and long term. Both provide stability and contribute to closing the virtuous cycle of *planning-execution-evaluation*, because they do not depend directly on the powers that be, and are also usually more neutral in face of temporary obstacles.

Given that all societies have a group of institutions dedicated to the evaluation of the government's actions, it is useful to promote the coexistence of evaluating reviewers on both levels, especially in order to stabilize the interactions between powers, and lay the necessary conceptual and instrumental bridges in the appropriate language.

Likewise, it is fundamental that political-interaction dynamics are developed within an institutional framework that allows the evaluation of agreements and disagreements (March & Olsen, 1993; Hall & Taylor, 1996; Peters, 2003). From this point of view, national institutions are monitors and drivers of the achievements within a national reference framework. In this sense, for a national institution to constitute a national project in itself, this system must be developed based on two principles (Aguirre, 1999):

1. **The Principle of Autonomy.** Although States regulate the distribution of power, given overlapping of Federal and State powers, national authorities surpass local powers, by agreement of the States themselves, in order to regulate local policies, and not by supremacy of the federation.
2. **The Principle of Participation.** The existence of the State is a consequence of the previous existence of the States

that comprise it, and this demands an adequate constitutional architecture to guarantee its autonomy.

Because access to information and knowledge are the guiding threads of democracy, and the central core of the exercise of citizens' rights, evaluation remains the most direct way of gaining access to—and socializing—the progress and challenges of each entity. This must necessarily cover all areas of the educational authorities, and be communicated freely to all groups of interest.

Without a doubt, democratization of the evaluation of advances regarding education is one of the most clear expressions of a long-term view, because, as Rousseau (1754) states: “The establishment of the State rises from the hope for a higher good” and all societies must promote education with a democratic logic: The right of all to know and learn can only become effective through the measurement, analysis, communication, and most unrestricted access to results, as well as the possibility of comparing within a sufficiently wide reference framework.

In this statement, the challenge is clear: We must eradicate the idea that the exercise of evaluation is an aristocratic space in which “good results are the objective,” instead of analyzing the results and converting them into a means of improvement, creation, and incorporation of local strategies that address the prospect of development of an entire nation.

Undoubtedly, conservation along this path implies an enormous effort, but it carries many virtues. Creating a National Evaluation System that holds a permanent dialog with local bodies prepares democratic coexistence based on transparency and accountability.

If based on the evaluation of the results, the exercise of reflection is promoted, it is most likely that the citizens of a federation become citizens with a democratic lifestyle for the simple reason that they learned to coexist in that style of social order and relations (Harvey, 2015).

From this perspective, even more positive outcomes can be seen, under the magnifying glass of the different contexts, regarding the opportunities of each citizen of the *Union*: The variables associated to condition by birth will have less and less influence on the probability of access to culture, knowledge, and other opportunities for wellbeing. Therefore, these conditions will cease to be determining



factors in the dreaming, defining, and electing a path in life. This is unseen yet, but not impossible.

Finally, we must insist, as often as needed, that the Federation is the result of agreements between States, and not the starting point. To guarantee that national authorities fulfill their mission in a dignified way—in a society that has proven it is imperishable in face of many attacks—we must remember that, when building a democratic society, actions are always louder than words, always. €

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DOSSIER: FOUR DEBATES WITHOUT A PASSPORT

The Educational System: A Reflection of the Community

"Until your government (Mexican) and mine (American) recognize that quality is not only about repairing schools, but also about improving communities, and until changes are not generated within those communities, children will never succeed," says **David C. Berliner**—emeritus professor at the University of Arizona, co-author and author of multiple books—in an interview for the *Gazette**.

Evaluation is not a simple thing

The *Gazette* had a conversation with this author during the symposium "Key Topics on the Evaluation of Basic Education. Dialogues with the International Educational Academy", organized by the National Institute for Educational Evaluation (INEE) and Educational Research Department of the Center for Research and Advanced Studies of the National Polytechnic Institute (Spanish acronym: DIE-Cinvestav), in September, 2016.

"To assess teachers in classrooms is enormously complex because variables are changing by the minute," says David C. Berliner, author of over 200 articles and books, the most recent being *Collateral Damage*, which he co-authored with Sharon Nichols, on the corruption of education professionals through high-risk exams.

"It's not like evaluating a dentist, in which case all the aspects that should be assessed are well defined. To assess teachers is an arduous task, because their work is done in an unstable environment. You have to take into account variables such as the presence of students, the absent ones, the ones that are acting differently maybe because they didn't

eat that day, which of the children who actually attended seem to be all right. You have to consider at which point of the syllabus the teacher is in, if he is in the middle of a lesson or at the beginning, for example. The evaluation of teaching depends on how you look at the students in the classroom, what strategies teachers apply to control them, and in which way they exercise authority over them, or what kind of books they use. There are many variables to consider."

Context: Considerations in Face of Educational Evaluations

"The first thing to consider is whether the data on the performance of children will be used as a measure for the success of schools or as a measure for the success of teachers. These kinds of results are not a function of the performance of schools, nor teachers', but, rather, they are a reflection of the whole community. It is a function of the communities in which the children and the families live, and it is related to the values in which children develop, to their parents' education."

"So until your government (Mexican) and mine (American) recognize that quality is not only about repairing schools, but also about improving communities, and until changes are generated within those communities, those children will never succeed. Never. Until that time, there will be no real improvement," says Berliner, who has given lectures at the Universities of Massachusetts and Stanford, in the United States, as well as in Australia, Canada, Netherlands, Spain, and Switzerland. "This is how gaps in the learning process start to appear from the first years in school and are still present after ten years, because the conditions in the communities don't change."

"As long as nothing is done in the social life of these communities, the situation in the schools is not going to improve. And there may be exceptions, it may be that one school suddenly starts to do better, or a child may step out of poverty. But, the truth is that the rule overcomes these exceptions; and the rule is that, if there are poor children in poor neighborhoods that coexist with other poor children at school, they will have a poor performance, they are not going to succeed. That school is not going to work and you can't blame it on the teachers. It is not a mat-

* Interview carried out during the symposium "Key Topics on the Evaluation of Basic Education. Dialogues with the International Education Academy", organized by the INEE and DIE-Cinvestav, in September, 2016.



ter of bringing whatever teachers you may want, nor a matter of the children being kept “learning” for over five hours at school; it’s not going to work, no matter what, because problems are not inside the school, but outside of it.

“Something that must be highlighted in this context is that, if you’re going to assess teachers, the requirements of their job have to be assessed; their performance in the classrooms and the work behind it have to be observed; it is necessary to assess how they prepare to give their lessons, why they take courses, how they teach mathematics and history, if they know the Mexican Constitution, among many other aspects. In a way, to assess teachers according to what children learn is wrong because that is not up to the teachers but the community they live in.

“If what you want is to improve the teaching system, the first thing is to know the teaching environment (to observe), and then talk about what you want to improve; and, in order to do it you have to invest. It’s like any other change process, if you want to do yoga or play tennis, you can learn it yourself, but it’s better if you hire a teacher to support you. It’s the same thing with teachers, if you help them to do better what they have to do, to enrich their performance through an accompaniment system, it will be a lot better.



Assessment and observation

“It is a lot harder to evaluate teachers without going to the classroom. To do that, by the way, is pretty expensive, but it is necessary to see how they teach. Moreover, it is necessary to have a whole structure that will allow you to assess inside the classroom, with other teachers—recognized as “great teachers”—as observers. On the other hand, if you’re going to go to the classrooms to assess, you have to make sure that the assessment includes feedback, which means letting the teachers know how they can improve their job and, therefore, investing money on upgrading processes that will allow them to improve their performance.

“One of the main demands, currently being discussed, of teachers throughout the world is that they don’t want to be assessed just through an exam, they want to be observed. The exam is absolutely wrong. If you ask a person on the street if teachers must be assessed by what children learn, they will answer yes. It’s perfectly logical. But what this person doesn’t know is that there are many factors intervening in the teaching process and that these exams do not take into consideration what is happening in the environment in which a teacher teaches.”

“On the other hand, through the exercise of observation, the assessment becomes more sensitive. That is to say, you become aware of what is going on and what we need to understand is that the teaching process is full of multiple variables. Observation is sensitive to the reality that teachers face because nobody understands that the teaching environment is highly unstable and it has to be that way. Conditions are very different in each case.”

Poverty and context: Must we compare schools?

“When evaluating a school, you have to consider the context in which children develop, and take into account community factors. This is what is being discussed, we cannot demand less from teachers who are in vulnerable areas. But there are no easy solutions,” says this researcher and professor who presided over the American Association for the Research in Education (AERA).

“What we can do is to analyze schools that are similar, for example rural ones, and see the learning conditions in other similar schools. Then, if one of these schools is having better results, we have to research what that school is doing to accomplish it. We have to put these

two schools in touch and get them to know each other, get the teachers to converse and, why not, to work together.

Policies from the Local to the Federal: Two Proposals

“In this sense, there are two models that could offer support for schools in vulnerable contexts. One is *Cross-Age Tutoring*, that involves almost no resources. The proposal is to have groups working together, the second year with the fifth year, the sixth year with the third, and so on. In small schools, you can implement this model, where the teacher is able to work with all different grades. The groups of little children are taught by bigger ones.

“This would be a recommended policy for multi-grade schools; mainly, because it allows the teacher to attend different grade students.

“The other one is *Funds of Knowledge*, directed by Luis Moll, and developed in a very poor neighborhood in Tucson, Arizona, in a school with Hispanic children in a vulnerable situation and with a rather low performance. This model starts off from recuperating the knowledge produced within the community, knowledge that families have in their keeping is rescued; for example, how to make tortillas, how to make things with iron, fixing computers, etc. The goal was to build a school around this context of funds of knowledge in which the children develop. Two things happened with this system. On the one hand, children felt more integrated and comfortable within the school community; and, on the other, they felt their parents, uncles, and other family members were great for all the knowledge they had.

“Thus, this model is an important stimulus for children to feel more at ease at school,” says this member of the International Education Academy (IEA).

Southern Border: Cultural, Linguistic and Ethnic Diversity

“It’s easier to assess children if you situate them within their context. It’s not like the child is going to arrive to the first grade and he or she will suddenly understand everything in English. A humane transition linguistics program is definitely needed. In Arizona we have a terrible program, because we don’t help the children. However, there are states where they are doing better. California is doing very well. It has a bi-lingual linguistic transition program, in the hope that children

will integrate within three or four years. It is a more humane system for children coming from Mexico or Guatemala. In the United States we have some ten thousand immigrants that come out our southern border and what is being attempted is for the school to shelter them, to be patient with them, to be humane with them, to provide them a tutoring system, and to follow up on them. We have to invest in a transition program and make that transition as quick as possible.

“We all know that, if this year I have two more students that don’t speak the language, the results of the assessments are going to be below average. So we have an educational system that rewards cruelty, because the teachers’ job is at stake. So, to start with, we have to design a system in which everybody loves these children.

“One of the solutions would be for these children to be left out of the assessment exams during the time they are going through their transition period. Otherwise, the drop in the results will influence on the teachers deciding to penalize them, or feeling a bit resentful. But, for example, if you give extra money to the teachers to work with the family or for having the family come once a week, a program to promote the relationships between families and schools is not even that costly. So, a little extra resources for teachers could go a long way in changing things for children.

Participation of Teachers

“In the Australian system, which is not an excellent educational system, but it is a good one, there’s a program where a few teachers are selected and placed elsewhere, mainly in the bureaucratic structure of the educational system. Thus, the departments of the educational system are composed by a third of officials who work permanently and two thirds of “practicing” teachers who have been selected for an internship there. After two years they go back to the classroom, but the interesting part is that real teachers are the ones working on things concerning the syllabus or the assessment. Teachers, moreover, are not bureaucratized, the goal is for them to help with decision-making in areas that concern them directly. Moreover, this changes how teachers view the educational system and the way they relate to it.

It looks to me like a good system where teachers get to know the bureaucratic work and participate in it. It’s a different socio-psychological process.

Evaluation for Public Officials

“I see two forms of evaluation. If you want to evaluate teachers and schools, you have to assess those who are behind them. You can have great laws that aim for improvement, but if you don’t have resources, then there won’t be any results. You can’t do anything.

“Thus, educational authorities have to act in two directions if they want for education to improve: to invest on improvements and to improve accountability. And accountability also must be seen in two different directions: school-community and school-government. If you, the government, give me a directive but you don’t give me any money, don’t expect me to comply with it.

A Message for Educational Decision-Makers

It is necessary for people to devote more attention to education, as it has been done in terms of other pressing issues. A lot more attention and money are required, as well as educational systems that contribute towards democracy as much as towards industry. That is to say, the government is always talking about schools and their contribution to productivity, but they must also be seen as *incubators* for democracy. €

The *Gazette* would like to thank Treisy Romero Celis, Chief of Project of the INEE’s General Direction of Guidelines for Educational Improvement, for facilitating this interview.



Get to know all the papers in the symposium “Key Topics on the Evaluation of Basic Education. Dialogues with the International Education Academy”: <https://goo.gl/91uPNt>



“Between Scylla and Charybdis: Using Standardized Performance Tests or Observation Methods to Assess Teachers”, video of the conference by David C. Berliner within the frame of the symposium: <https://goo.gl/fwrjeH>



David C. Berliner’s blog: <http://berliner.faculty.asu.edu/wordpress/>

DOSSIER: FOUR DEBATES WITHOUT A PASSPORT

Autonomy and Inequity: Debates on Federalism in Brazil

The emphasized Brazilian federalism makes it so “municipalities’ autonomies—by not coordinating responsibilities and budget capacity”—are transformed into “one of the factors of inequality,” asserts **Alejandra Meraz**, Superintendent of the movement Todos Pela Educação and member of the National Education Forum of Brazil.

Educational System Structure

With over a decade of work in Brazil, Mexican expert Alejandra Meraz contextualizes the educational system in that country:

“Starting from the 1988 Constitution of the Federative Republic of Brazil, formed by 26 states and a Federal District, states have a great autonomy that not always goes hand in hand with the necessary resources. This creates a wide discussion on the National Educational System (Spanish acronym: SNE) as well as the need for a system that is both respectful of the autonomy of the 5,564 municipalities and capable of offering them the technical and financial support to fulfill their responsibilities.

“The provision of the educational service is distributed between states and municipalities. The Federation has some schools with a long tradition, but their weight is less in relation to the system’s size. Therefore, the definition and collaboration between states and municipalities is essential to ensure the right to education.

“I must narrow down that the right to education—understood as the right to learn and not just as the right to go to school—is very recent. To put this right into effect, it is needed to define what the students are expected to learn.

“In that sense, the 2009 constitutional amendment universalized the access to mandatory basic education for children age 4 to 17 (it used to be from 6 to 14), what in Mexico represents the primary and second-

ary school. This happened after a broad political incidence by organized civil society organizations, among them, the movement Todos Pela Educação.”

Educational Financing & Inequity

Meraz—who was responsible for information management in the Cabinet of the Secretariat of Education of the Municipality of São Paulo—addresses the disadvantages of Brazilian federalism in the educational realm:

“When there isn’t a specific place, who is responsible for offering the service? The 1988 Federal Constitution creates this indeterminacy by establishing a collaboration regime that ascribes children’s attention to the states and the municipalities without any distinctions. Besides, unfulfilling this obligation generates legal responsibilities on public authorities.

“Another important element in modeling the relationships between different government spheres is the creation of the National Fund for Basic Education, formed with a fixed percentage of the tax collection. The states that do not reach the minimum value established receive a supplement by the Union, but even so they are quite far from those states which exercise a larger expenditure per capita and can invest more resources.”

The National Fund for Basic Education

Interviewed within the context of the 2016 International Seminary—Evaluation and Diversity: Justice & Equity in Evaluation, organized by the National Educational Evaluation Institute (Spanish acronym: INEE), Meraz details that Brazil “has an exemplary school census, with a technical rigor which allows for consistent monitoring over time,” and outlines the constraints of such achievement:

“The institution equivalent to the Mexican INEE—the Instituto Nacional de Estudos e Pesquisas Educacionais Anísio Teixeira (Portuguese acronym: INEP)—is responsible for the census, obtained from information given online by the schools (detailed by students and teachers) and by school-performance evaluations in Portuguese and Math. This evaluation comprehends the Fifth and Ninth grades, which are subject to a census in public schools, and the last grade of High School, which is a sample. It is a very ample evaluation system, a war operation.

“State and municipality resources are distributed based on that census, according to the number of students attended by school networks. There are some federal programs which allocate resources directly to schools, but the found money composes the municipality and state budgets.

“There is a more recent evaluation in the third year, focused on literacy and numerical instruction. Several public policies have been defined based on its results, it is widely used for public policy and its application is coordinated by the INEP, but executed by external agents. There are states that make their own evaluations, compatible with the national evaluation.

“What do we want those large-scale evaluations for? It is true that they inform public policy; but, what does the municipality do with that information? What does the teacher do and what can we give him to improve his practice in the classroom? Such an enormous public investment needs to be used better. However, it is being debated whether a great scale evaluation offers that possibility. Todos Pela Educação participated in designing the strategies for information distribution and use, with the goal of creating a bridge between external evaluations and the teachers.”

Consequences of the Lack of a National Curriculum

Brazil does not have a national curriculum, explains Alejandra Meraz, and the discussion on this topic is very recent, despite the 1996 Guidelines and Bases for Education foreseeing its elaboration:

“In Brazil it’s said that there are regulations that *don’t make it*, regulations that lack practical consequences, and such was the case of the National Educational Plan existing between 2000 and 2010. There was a lapse of four years without a Plan because it was debated during that period. In 2014, a new Plan was approved, which showed emphatically and explicitly the need for a national curriculum, creating thus the political climate for this discussion.

“The lack of this national curriculum is partially responsible for disparities such as: South and Southeast states have better school indicators in terms of access, quality, and teachers’ training, than those in the North and Northeast regions.

“Today, with a certitude among the educational community about the curriculum

being ‘what happens within the classroom,’ and respecting teachers’ autonomy of action, the National Common Curricular Basis (Portuguese acronym: BNCC) is built — that should be the reference in the design of school curricula.

“In that sense, it is incoherent that Brazil lacks a national curriculum but has a consolidated national evaluation system.

“Another situation that widens the inequality gap is the absence of an institutional text book, as it is the case in Mexico. There is free distribution of text books produced by the publishing market and pre-selected by the Union through the National Didactic Book Program, this organization sends materials selected by the municipality and state networks. Even though pre-selection ensures the basic quality of materials, the most challenging books are selected by the more consolidated networks, those that will have the capability to use them.”

Teacher Training

As for the teachers’ training processes, Meraz explains the Brazilian options and their pending issues:

“In Brazil, teacher training is analytically divided in Initial (at universities) and Continuous, or in service. The first one has facets that demand attention. A consequence the regulation had was nearly disappearing teacher-training schools, which existed mainly at the High-School level. Although constitutionally a professor may give classes in childhood education if he or she has trained for being a teacher at the High-School level, associations, unions, and social movements ask training to occur at the higher-education level. Thus, the academic degree of Pedagogy, which trains specialists on education, is equated with the training of a professor who pretends to follow the teaching career. This generates enormous confusion and causes the programs to be mainly academic.

“The need to reformulate the teacher training curriculum is being discussed now so the didactics, and the teaching methodologies, are clear and so its design ensures that teachers gain the knowledge needed in the discipline they will teach.

“In terms of Continuous or in service education, the great challenge is coordination of federal entities, both for teachers’ training and for any topic that could generate synergy among municipalities. Poli-

cies must be created to allow targeting local problems and integrating solutions that benefit all. Without external evaluation that allows reading the situation in school networks—which does not substitute the evaluation performed by the teacher in the classroom—whoever makes the public policy doesn't have enough information to design a continuous training program according to the needs identified through school performance in each specific context.

“On the other hand, national guidelines for teacher training give plenty of freedom for universities to define their own curriculum. The debate around the much-valued university autonomy is led by universities considered as elite universities—public ones—even though less than 30% of the professors trained study in them.

“Teacher hiring is done by the entity providing the service: The Federation, the states, or the municipalities. Access in each municipality is necessarily allotted by public contest. It is possible to have temporal professors, though generally this becomes a permanent situation because the Fiscal Responsibility Law limits the extent of recurring spending in public budgets and, therefore, the extent to which payroll can be a part of them.”

The Participants in Decision Making

As for the structures that direct policies, Meraz, an economist graduated from the Autonomous Technological Institute of Mexico (Spanish acronym: ITAM), offers a description:

“The National Educational Council—formed by the government and the civil society with the representation of researchers' associations, unions, social movements, and minorities movements—has an essential role in the definition of the BNCC and in overhauling the guidelines for teacher training.

“There are also State Educational Councils and Municipality Educational Councils with different attributions, structures, and regulatory capacities. For example, the one in São Paulo has a good operational structure, it gathers highly skilled specialists, and it influences in the definition of basic and higher education guidelines, which allows for advances beyond the national regulation. On the other hand, there are states and municipalities where councils are deprived of even the minimal structure and are not considered in the decision-making process nor do they have relevant attributions.

“In recent years two associations consolidated and gained strength—the council that gathers state-education ministers, and the group of municipality-education officers. Their relevance is visible since representation is delegated less and less now, and ministers themselves are the ones participating in them. This becomes relevant in the formulation of federal public policies.

“Besides the great relevance of social movements and their demand for a public education of quality, the action of what was once known as philanthropy must also be mentioned; today it is structured in institutes and foundations developing projects with the perspective of contributing to define better national policies.”

The Vision from Civil Society

Finally, Meraz makes a breakdown of the goals of the movement Todos Pela Educação, which began in 2006:

“Todos Pela Educação thinks in a tripod composed by an observatory and impacting actions that, on one the one hand, stimulate society's demand for public education of quality and, on the other, contribute so that the design of public policies is based on the evidence of the best practices. In Brazil, there is microdata available on grand scale evaluations and school censuses, there's a lot of transparency within the limits of the processing capacity a database of such a size demands. Todos Pela Educação wants to contextualize this data and translate it into information communicable and valuable for the public debate.

Part of what is involved here is strengthening the demand—the point is fostering the claim for greater quality in education. We work hard with families and the society so education becomes a priority matter.

The third leg of the tripod is the promotion of dialogue tables so decision makers and specialists collaborate in the definition of better public policies. €

Interview: Laura Athié



Know more about

Todos Pela Educação: <http://www.todos-pelaeducacao.org.br/>



INEP:

<http://www.inep.gov.br/>

DOSSIER: FOUR DEBATES OTHER PERSPECTIVES

Towards a new Educational Federalism

This article presents a brief reflection on the need for strengthening institutional competences in order to respond to the needs required by the National Educational Evaluation System operation. From the authors perspective, this can be the ideal space for setting up the new educational federalism.

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Introduction

In Mexico, since the 90s, structural and institutional changes have been put in place to ensure the attention to national problems such as poverty, inequality, health, access to governmental information, and education (Vélez, 2004; Somuano, 2007; and Dávalos, 2010). However, these transformations haven't been fast nor efficient enough in terms of the design, management, and implementation of public policies to confront such problems.

The challenges and threats to accomplish that all Mexicans exercise their right to receive a mandatory education of quality in conditions of equity and equality—as the Political Constitution of the United Mexican States establishes—have substantially modified the relationships, obligations, and responsibilities of the actors within the National Educational System (Spanish acronym: SEN).

Educational federalism is one of the elements of the Mexican political system that

have been impacted with the 2013 Educational Reform, particularly by the process of formulation and implementation of derived public policies.

The relationships between different Government levels—Secretariat of Public Education (Spanish acronym: SEP) and state-level educational authorities; National Institute for Educational Evaluation (Spanish acronym: INEE) and Professional Teaching National Coordination (Spanish acronym: CNSPD), among others—show the complexity of the new educational order, within the process of formulation and implementation of the National Educational Evaluation Policy (Spanish acronym: PNEE) and the National Educational Evaluation System (Spanish acronym: SNEE), as the guarantor for the right to an education of quality.

The rules—both formal and consensual—which regulated relationships between governmental and non-governmental actors in the recent past are no longer pertinent to carry out, in an efficient and effective way, the production of those goods, services, and norms necessary to achieve the goal of evaluation contributing to improve the quality of mandatory education.

This is due to the fact that the kind of educational federalism existing between 1992 and 2013 was pertinent to confront the challenges for the implementation of the National Agreement for the Modernization of Basic Education (Spanish acronym: ANMEB), in which State educational-authorities' faculties were centered in the administration of the basic educational system, with a vertical interlocution with SEP and without real mechanisms of horizontal cooperation.

In promoting structural changes within the State, derived from the 2013 Educational Reform, resources—financial and human—are the key element for their implementation. The competences to achieve it are equated with greater qualifications and building of institutions through improving human-resources performance which, within local administrations, is responsible for educational evaluation. It is not just about obtaining optimal results by the instances included within the government's institutional architecture, but also about reflecting on the improvement of governmental an administrative management devoted to the design, construction, operation, and implementation of State interventions.

Educational Federalism and Institutional Competences in Mexico before the 2013 Educational Reform

Until 1992, educational public policy was defined and operated, mainly, under a “top-to-bottom” model. Its primary goal was to expand basic education coverage. In the political terrain, the federal executive power and the members of the Congress of the Union were affiliated to the same political party, and in the states a similar phenomenon was happening.

Resources destined to education were directly managed by SEP and most teachers were affiliated to the National Union of Education Workers (Spanish acronym: SNTE), which was linked by its internal norms to the ruling party.

The ANMEB was endorsed—on May 18th, 1992—by the Presidency of the Mexican Republic, the General Secretariat of SNTE, and the state governors, and it transferred the administration of teachers' and basic education to the states. It is significant that educational evaluation was limited, practically, to students, and to teachers within the economic-stimulus program through the Teaching Career National Program.

The administration transfer represented a transformation of educational policy management, which meant the emergence and development of institutional competences to respond to the challenges for the ANMEB implementation. For example, delivering resources to the states originated new labor situations in each of them.

In the 1994-2000 federal administration, educational evaluation had its first relevant boost. The 1995-2000 Educational Development Program established:

Improving the quality of educational services and their pertinence. Elevating the quality of education is the result of an array of factors. When there has been advances in it new expectations appear and, for that same reason, it is a continuous race in search of improvement, which requires a constant effort of *evaluation*, updating, and innovation. Educational contents must be pertinent to the student's situation, capabilities, and aspirations (SEP, 1996).

Besides, legal and institutional changes were made so SEP's General Evaluation Direction (Spanish acronym: DGE) could count with the faculty to coordinate several evalu-

ations: *a*) those of a qualitative nature for basic and middle levels; *b*) the evaluation of factors associated to educational quality, school performance, and the impact of some compensatory programs, and *c*) the evaluation of factors that have an impact on schools in terms of educational improvements or setbacks (OECD, 2012).

With the advance in ANMEB implementation, some state governments incorporated—in their strategic educational agenda—the evaluation of basic and middle levels, and developed the capacity to articulate and structure themselves following the national educational objectives and goals (ends and purposes), as well as the design and construction of systems and tools (products and activities) for the gathering, compilation, systematization, management, and analysis of both quantitative and qualitative data.

In other cases, however, they simply incorporated to their governmental agenda the fulfillment of national evaluations, without designing exercises of their own which could produce relevant information to substantiate decisions oriented towards improving the quality of education with a local pertinence.

It is worth mentioning that some experts in educational policy deem relevant considering the promotion of educational federalism as a State policy, since it is a public action that has been stable throughout several years, transcending, even, federal and state administrations (Ornelas, 2008).

Educational Federalism and Institutional Competences in Mexico after the 2013 Educational Reform

With the 2013 Reform the evaluative task in our country is under INEE's responsibility, an autonomous public organization responsible for regulating, centrally, all the educational evaluation exercises; coordinating the organizational structures that will carry out this exercises in the educational entities; and issuing the guidelines that will allow an efficient operation of educational evaluations.

The PNEE's establishment and the SNEE operation imply the acknowledgment of educational evaluation as a public policy with a unique identity, which objective is contributing to ensure the exercise of the human right to receive education. This means a substantial change from the times when, in the past, it was considered as an educational

endeavor element, or as a stage within the cycle of educational public policy.

The roles and responsibilities linked to the current regulation require, for its compliance, that all actors obligated to fulfill it count with institutional competences —organizational, legal, technical, and financial— to be able to implement the PNEE and to develop educational evaluation with methodological and scientific rigor.

In that sense, PNEE's implementation will have to be performed within the framework of a new educational federalism in which the complex system of SNEE and other instances created by INEE converge for intergovernmental coordination, given that the prevailing system does not correspond to the expectations of many individual and organizational governmental actors (Cejudo, 2014) since the norms, regulations, and values that contributed to the ANMEB execution have lost currency, pertinence, and usefulness in the present.

Based on Paul Sabatier (2010) proposal to analyze public policies processes, the governmental and non-governmental actors involved in the PNEE form permanent, circumstantial, or temporal coalitions that promote interventions. These coalitions may generate tensions aiming to place specific and punctual themes in the strategic governmental agenda and/or opposing the PNEE implementation. To avoid them or defer attending them, to reduce them or disappear them, could affect the efficiency and effectiveness of the evaluation policy.

The swiftness in identifying the rules and precepts of educational federalism that are no longer current will allow to define rules, attributions, responsibilities, and obligations for each of the actors involved within the educational evaluation's formulation and implementation.

Final Thoughts

Building a new educational federalism is an institutional competence that the Mexican State must develop as a matter of priority with the goal of setting up the foundations for an innovative governance of the SEN, and preparing the ground for leadership effectiveness of the federal and state governments.

It is convenient to reflect upon the need to form coalitions that impulse a change in terms of rules, regulations, and values. These transformations entail obligations, new responsibilities and challenges, as well

as opportunity windows that make us wonder whether the institutional conditions which could allow starting the implementation of the educational public policy exist.

It is necessary to move forward in the integration of professional teams to consolidate or develop the institutional competences needed to confront the new legal framework.

The SNEE may be the ideal space for generating elements that would favor the construction and launching of a new educational federalism. From our perspective, the following could represent a departure point:

- To advance in the construction of a network government in which *strategic hubs* exist, where involved actors can take well-founded and co-responsible decisions which are pertinent to their legal responsibilities.
- To establish, as a basis, the empowerment of those strategies, projects, and actions oriented towards the development of institutional competences in the state governments.
- To encourage that new rules, values, and norms contribute to a horizontal decision-making process based on evidences.
- To perform, periodically, evaluations on institutional competences at state and central levels to identify potential deficits in the design and evaluation of the PNEE. €

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