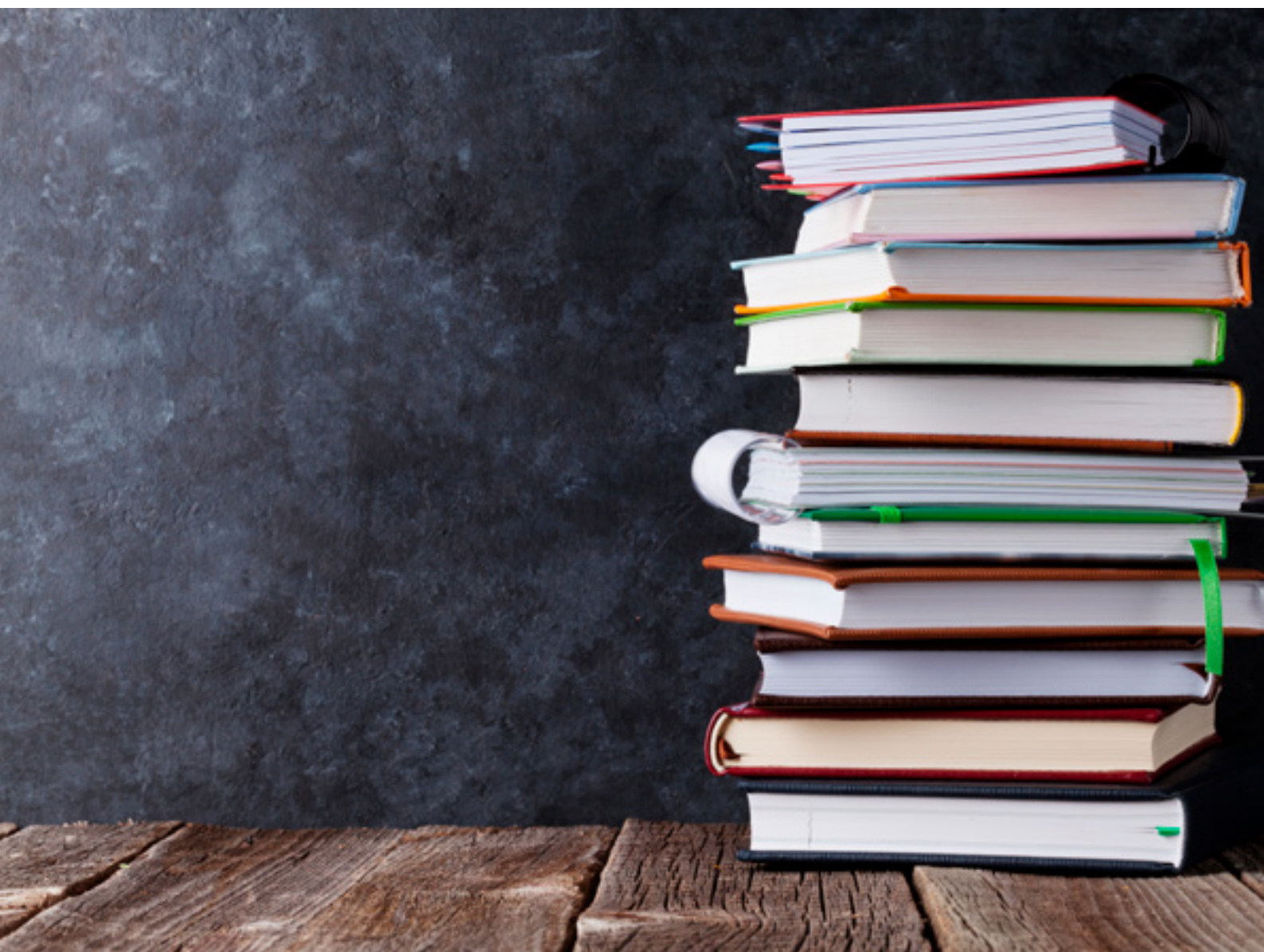


COUNTRY NOTE

Teacher career reforms in Mexico

The initial stage (2013–2015)

Sylvia B. Ortega Salazar



United Nations
Educational, Scientific and
Cultural Organization



International Institute
for Educational Planning

Management of teachers

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About the project

Teacher career reforms are high on the agenda of many governments. A number of countries have reformed their teacher career structures over the past decades. Others have foreseen introducing changes in the near future. Yet, as countries launch into such reforms, it is important to make information available on the diversity of options and their implications.

The potential to learn from other countries, combined with the need to address this gap, prompted the UNESCO International Institute for Educational Planning (IIEP) to launch a research programme on teacher career organization and management. It aims to provide policy-makers and governments with a variety of policy choices related to teacher careers, and to explore perceived effects on teacher motivation, attraction, and retention as well as implementation challenges that countries face in the reform process. This information is essential for countries wishing to adapt their teacher careers before they decide to opt into complex and resource-intensive reforms.

The following research questions guide the project:

- What options exist in terms of the organization and management of teacher careers? How are teacher careers structured and promotion modalities organized?
- What are the perceived effects of different career models on teacher motivation, attraction, and retention?
- What difficulties are countries experiencing with regard to the management of their teacher career scheme? What are the implications and implementation challenges of different teacher career models?

The project started in 2015 with ‘Exploring the impact of career models on teacher motivation’ (Crehan, 2016), an exploratory study that reviewed the available research literature in the field of teacher career organization and the psychology of motivation. It framed the typology of career models and evaluation modalities referred to in this research. Field research followed: participating countries were purposely selected from among different geographical zones and income levels and because their reforms sought to diversify teacher career structures and professional advancement opportunities available to teachers.

In 2016, country reports collected accurate descriptions of teacher career structures in Colombia, Ethiopia, Lithuania, Mexico, Peru, Scotland, South Africa, and Thailand as well as information related to the reform process. Researchers analysed laws and regulations, basic statistics, and existing research evidence in addition to conducting semi-structured interviews with actors involved in the organization and management of teacher careers.

In 2017, in-depth case studies in Ecuador, New York City, and the Western Cape in South Africa were conducted. Their purpose was to provide a more thorough analysis and to find out from teachers themselves their perspective on changes made to their career. The career models implemented in Ecuador, New York City, and the Western Cape were selected because of their promising approach combining career opportunities with new evaluation and salary policies. This research relied on qualitative interviews with teachers and leadership staff as well as quantitative data from teacher questionnaires to capture the diversity and complexity of teacher careers in these different countries.

The research looked into a variety of career structure design elements that can give insights into career reforms on managerial and administrative levels. The research findings highlight key aspects that policy-makers need to consider before embarking on teacher career reforms.

Other Country Notes in this series:

Teacher career reforms in Colombia

Teacher career reforms in Ethiopia

Teacher career reforms in Lithuania

Teacher career reforms in Peru

Teacher career reforms in Scotland

Teacher career reforms in South Africa

Teacher career reforms in Thailand

Case Studies in this series:

Reforma de la carrera docente en Ecuador

Teacher Career Pathways in New York City

Teacher Career Pathways in South Africa: Insights from the Western Cape

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List of abbreviations

CNSPD	Coordinación Nacional del Servicio Profesional Docente (National Coordinating Office of the Professional Teaching Service)
CONAFE	Consejo Nacional de Fomento Educativo (National Council for Promotion of Education)
INEE	Instituto Nacional para la Evaluación de la Educación (National Institute for the Evaluation of Education)
SEP	Secretaría de Educación Pública (Ministry of Education)
SNTE	Sindicato Nacional de Trabajadores de la Educación (National Education Workers Union)
SPD	Servicio Profesional Docente (Professional Teaching Service)

1. Introduction

The implementation of new teacher career policies adopted as a part of an education reform in 2013 was subject to intense public debate and protests coordinated by organized teacher groups, particularly in southern Mexico.¹ Although there was consensus that education needed a profound transformation if it was to provide opportunities for learning to all students and adequate conditions to develop teaching and professional practice, public opinion was strongly divided with regard to the specific rules concerning entry into the teaching profession, in-service evaluations, and promotion modalities.

From the standpoint of the government and some social actors, the concept of a merit-based teacher career, introduced with the 2013 reform, represented the end of an era when teaching positions and promotions were assigned arbitrarily by the Sindicato Nacional de Trabajadores de la Educación (SNTE, National Education Workers Union) and education authorities. However, other stakeholders (teachers, experts, academics, and parts of the SNTE) saw the reform as entailing the loss of teacher workforce stability, professional rights, and benefits.

Although in 2013 the new teacher policies received strong public support, they were still meeting resistance within the profession by 2016. Continued violent incidents and implementation problems contributed to strong tensions between teaching professionals and education authorities. Demands to revise the reform and address issues related to teacher career organization increased. The government in power from December 2012 to November 2018 stated that insofar as the organization and management of teacher careers were mandated by law, the rules were not negotiable. Advocates of revising the premises of the reform argued that it reduced the country's education problems to teacher performance, to the detriment of the profession's public image and teacher labour rights. They also criticized the evaluation processes and instruments used to assess teacher competences, performance, and quality. Analysis of the challenges involved in the Mexican experience yields interesting insights and important lessons.

The information presented in this report is based on official documents, legal dispositions, secondary norms, government statistics, and academic papers. In addition, semi-structured, in-depth interviews were conducted with the national coordinator of the Servicio Profesional Docente (SPD, Professional Teaching Service), a member of the Instituto Nacional para la Evaluación de la Educación (INEE, National Institute for the Evaluation of Education), and two members of the national committee of the SNTE.

The salary element of the teacher career structure in Mexico relies on strategies pertaining to the following models:

- **Single salary schedule.** Teachers receive an automatic salary increment every five years, independent of appraisal results.
- **Salary progression based on appraisal.** Teachers may receive a salary increase every four years upon achieving successful results in their performance evaluation.
- **Career ladder.** Horizontal and vertical promotion opportunities are available depending on teachers' appraisal results and the availability of vacancies.

At the time of publication it was not yet clear whether these models would be changed under the new administration.

1. The fieldwork and preliminary research for this chapter took place over the course of 2015. On 12 December 2018, the newly elected president sent an initiative to Congress to modify several articles of the Constitution, thus initiating the cancellation of the 2013 reform and all its components (López Obrador, 2018).

2. Contextual information

2.1 Teaching staff profiles

Most Mexican teachers (87 per cent) work in public schools (INEE, 2015b). At the beginning of the 2015/2016 school year, 1,047,536 teaching professionals worked in public establishments, including 186,983 pre-school, 514,141 primary and 346,412 secondary teachers (SEP, 2016b). Between 1995 and 2012, the number of teachers in the country grew by 60 per cent.

Most teachers in Mexico work under permanent contracts and the rest under fixed-term contracts (in 2014, 76 per cent of lower secondary teachers had permanent contracts and 23 per cent fixed-term contracts [OECD, 2014]). In addition, community teachers work in Mexican schools under the Consejo Nacional de Fomento Educativo (CONAFE, National Council for Promotion of Education).² However, they were excluded from the career model under the reform and thus were not considered in this study (CONAFE-BID, 2009).

Teachers constitute a significant share of the Mexican labour force and account for one-quarter of the country's professionals and qualified technical personnel (INEE, 2015b). Among the reasons why the teaching profession is attractive, the following may be noted:

- Short working week, compared to the rest of the labour market (20 hours per week in primary and 25 in secondary level) and long vacation periods (Santibáñez, 2002).
- Competitive and protected salaries, compared to those of other professionals. Moreover, several studies show that when the general wage level increases, teacher salaries experience larger growth, and in periods of a general decrease, teachers' income is less affected (Santibáñez, 2002; Santibáñez and Martínez, 2010; INEE, 2015b).
- Provision of social security, access to credit, and health services.

Additional reasons offered by the SNTE representatives included 'vocation, family tradition, job security, and opportunities for growth over time'. The INEE member also emphasized that even when economic conditions make the job market tight, 'teachers will still be needed and opportunities to enter the profession will be available to competent candidates'.

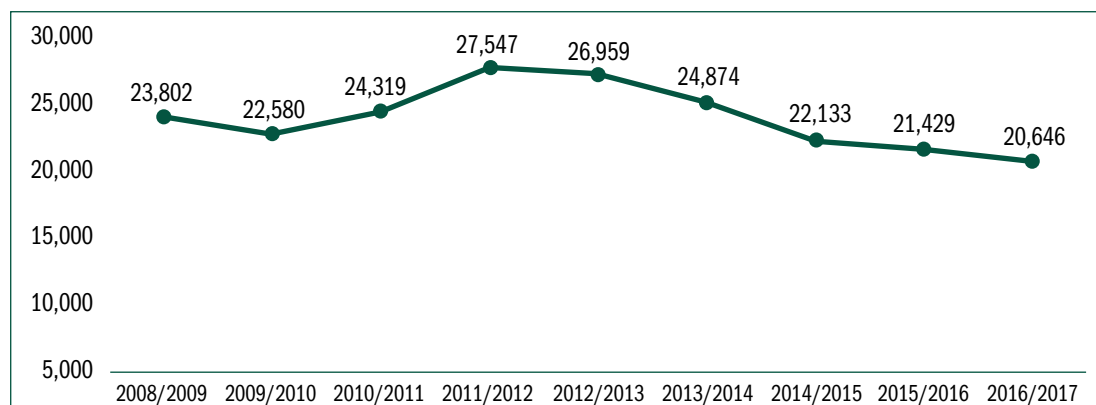
Nevertheless, numbers of entrants to normal schools (*escuelas normales*, key teacher training institutions) have been decreasing since 2011 (see Figure 1). At the time of research, only 72.6 per cent of available places in these schools were filled (INEE, 2015b), a situation regretted by SNTE members, who expect that the other professionals who increasingly fill the ranks of the teaching service 'will not be adequately prepared to teach children'.

Becoming a teacher used to be very attractive to lower-income and rural populations (Arnaut and Giorguli, 2010). However, with more demanding requirements for entry to normal schools (since 1984) and increased opportunities to enrol in universities (since 1980), the teaching career has lost some of its attraction. Interestingly, though, the number of university graduates applying to enter the teaching service grew steadily from 2008 to 2015, a fact that may be explained by a contraction in the professional labour market and a decline in compensation offered to professionals in most fields.

While the decrease in normal school enrolment suggests that a teaching career is not attractive to college-level entrants, many university graduates unable to find other professional work are attracted to teaching on a temporary or part-time basis. In the first quarter of 2015, 41 per cent of professionals under the age of 30 were unemployed or in the informal economy (INEGI, 2016).

2. Community teachers work with groups of small children and adolescents in pre-primary, primary, and secondary levels. Generally, they are young and hold a secondary school certificate, baccalaureate, or bachelor's degree. They work for one or two years in return for a stipend, which is later extended so they can continue their studies (CONAFE-BID, 2009).

Figure 1. Number of first year students in public normal schools, 2008–2016



Source: Principales cifras del sistema educativo nacional (data from SEP, 2008–2016, www.planeacion.sep.gob.mx/principalescifras/).

Teacher number projections in 2015 showed that over 60,000 would retire by 2018 and 160,000 by 2023 (INEE, 2015b). While normal schools may meet demand for pre-school teachers, primary and secondary level vacancies will exceed their capacity to produce candidates to enter the profession. Thus vacant positions are expected to be filled by university graduates who see teaching as an alternative career when other job vacancies in the national labour market are scarce.

Another important contextual aspect is the cycle of 70 years that ended with implementation of the reform. Between 1942 and 2012, with no substantive changes, teachers were legally defined as employees represented by a single union (the SNTE, founded in 1943). All teaching, technical, and manual workers of the Secretaría de Educación Pública (SEP, Ministry of Education) were members of the organization. In the absence of teachers' associations, the SNTE became not only teachers' legal representative in labour condition negotiations but also a valid representative before the government with regard to aspects linked to the definition and operation of education policies. The SNTE has been, in practice, a co-manager of the basic education system and a key political actor in the Mexican democratization process that began around the turn of the 21st century.

2.2 Key legislation and main actors

Key legislation

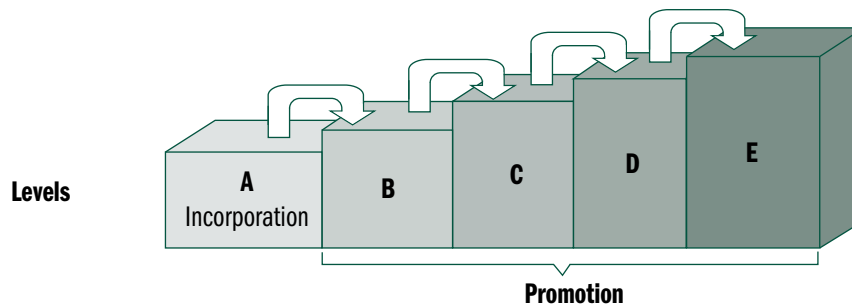
Before the modification to the teacher career structure in Mexico was introduced in 2013, between 1993 and 2012 there were two parts to the organization of teacher careers: promotion to management positions and the Carrera Magisterial programme (salary progression based on appraisal). The introduction of an entry examination was an important change during this period: the requirements for entry to the teaching profession included examinations only in some states until 2008, when they became mandatory under an agreement between the federal government and the SNTE (IBD, 2016). The national exam to enter the profession aimed to eliminate discretionary practices and corruption in the assignment of teaching positions (OECD, 2004; INEE, 2015b).

The Carrera Magisterial sought to stimulate academic preparation, foster good teaching practices, and promote professionalization. Under this programme, teachers and principals were eligible to receive permanent wage increments if they had a positive evaluation. There were five levels, A, B, C, D, and E, each representing a successively larger wage increase, varying from 25 per cent to 200 per cent.

The appraisal process evaluated various work areas and assigned a certain weight to each (see Figure 2). The evaluation mode was cumulative, as the final score was obtained after

adding together the points received in each area. No teacher scoring below 70 points was eligible to receive a salary increase. Those scoring above 70 comprised the eligible pool of participants in each state, although not all were actually awarded a salary increment since the criteria for the increase depended on each place, the score obtained, and the rest of the teachers. Evaluation could therefore be considered norm-referenced (Vegas, 2005).

Figure 2. The Carrera Magisterial model



Factors	Maximum score		
	1 st level (teachers)	2 nd level (principals and supervisors)	3 rd level (pedagogical support)
Student result in standardized exams	50	40	30
Courses and training	20	20	20
Participation in school activities	20	20	20
Academic preparation	5	5	5
Seniority	5	5	5
Management	---	10	---
Pedagogical support	---	---	20
Total	100	100	100

Source: SEP and SNTE (2011).

In addition, teachers at different levels could be promoted to various managerial positions (see Figure 3). The selection mechanism consisted of a closed competition. Cumulative evaluation was used to appraise factors such as knowledge, skills, seniority, discipline, and punctuality.

There were substantial issues with both models. The Carrera Magisterial programme was evaluated at least twice (Santibáñez *et al.*, 2006) and the findings showed no correlation between incentive level and student results. It was noted that the SNTE representatives and local authorities conducting appraisals were often interested parties rather than objective judges. Access to promotion posts was limited to vacant positions and assigned to the more senior teachers, which discouraged younger teachers with outstanding competences. Finally, continuing professional development options were not linked to appraisal results.

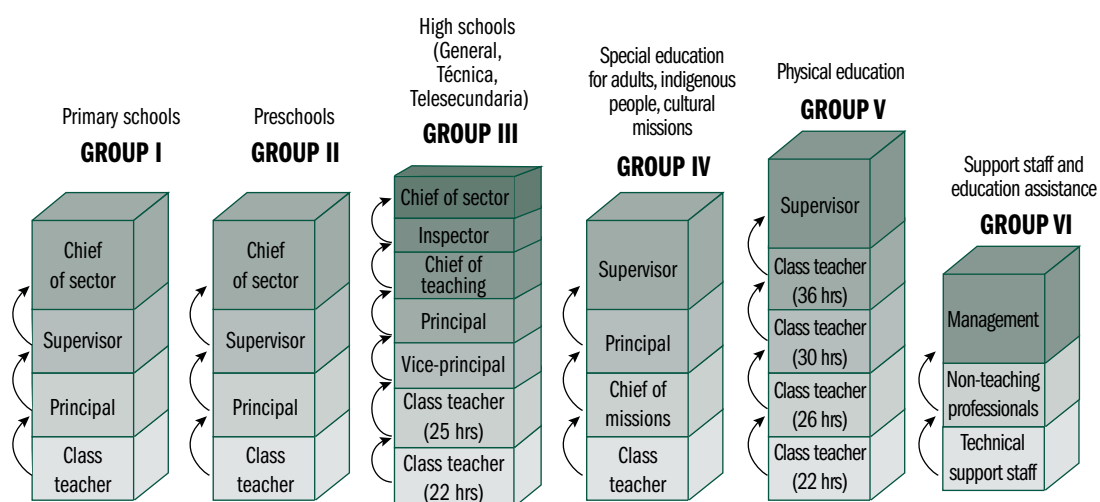
In late 2012, Enrique Peña Nieto, then the newly elected president of Mexico, called upon all political forces to commit to a programme of structural reforms in a wide range of sectors, including education. Congress amended the Constitution in early 2013, and passed secondary norms later in the year. Many education reforms were adopted at this time, including teacher career reorganization, which thus should be considered within the context of the wider educational change.

The definition of a new career structure based on merit, as evaluated by an external public organism, was at the core of the teacher career reform. *Table 1* presents key legal documents that framed it, and their content.

Figure 3. Career ladder

Factors:

- Knowledge: courses and professional development.
- Skills: initiative, diligence, and efficiency.
- Seniority: years of service in the corresponding unit.
- Discipline: observance of regulations and ability to follow instructions.



Source: SEP and SNTE (2011).

Table 1. Legal and institutional framework of the teacher career reform

Reform to the General Education Law	Law on the National Institute for the Evaluation of Education	Law on the National Professional Teaching Service
<ul style="list-style-type: none"> Confirms the government's obligation to provide quality education to children Ratifies the free nature of public education Distributes responsibilities in the domain of evaluation Considers implementation of the National Professional Teaching Service 	<ul style="list-style-type: none"> Assigns the responsibility for regulating the national evaluation system of all aspects of education as a mechanism to enhance its quality Defines institutions, processes, instruments, and authorities involved in the national evaluation system Identifies responsibilities of actors Defines quality of education 	<ul style="list-style-type: none"> Creates the Coordinación Nacional del Servicio Profesional Docente (CNSPD; National Coordinating Office of the Professional Teaching Service) Assigns responsibility for organizing and managing the processes of entry, promotion, recognition, and continuity Defines merit-based processes and evaluation modes based on standards Determines sanctions against public servants and education authorities in cases of non-compliance

Source: DOF (2013a, 2013b, 2013c, 2013d).

Actors involved

The legal framework for the organization and management of teacher careers required the coordinated participation of SEP, the INEE, and subnational education authorities, as outlined in Table 2.

Table 2. Main actors involved in the teacher career and their responsibilities

Secretariat of Public Education	National Coordinating Office of the Professional Teaching Service	National Institute for the Evaluation of Education	Subnational and other education authorities
<ul style="list-style-type: none">• Determines standards (profiles, parameters, and indicators) and professional development programmes	<ul style="list-style-type: none">• Operates evaluation processes	<ul style="list-style-type: none">• Defines and schedules evaluation processes• Approves evaluation standard and designs instruments• Supervises evaluation processes• Assigns evaluators• Communicates individual results	<ul style="list-style-type: none">• Deploy teachers• Assign promotions• Manage teacher careers under the dispositions of the CNSPD

Source: DOF (2013a, 2013b, 2013c, 2013d).

2.3 New entrants to the profession

Requirements for entry to the teaching profession

Entrance to the teaching profession is by response to a public call for candidates. Eligible candidates historically included individuals trained in normal schools, but since 2007 university graduates have also been eligible to take the examination to enter the profession (INEE, 2015b). Those who succeed at the examination receive a yearly contract, to be renewed after evaluations conducted at the end of the first and second years. Only then is the teacher offered an open-ended contract.

The public call to participate in open examinations is issued by the CNSPD. It offers three types of positions in the 31 states and Mexico City: vacancies, newly created positions, and temporary appointments for each level and type of service. Eligible candidates are evaluated against standards defined by law for beginner teachers.³ The CNSPD is also responsible for specifying the profile of the teaching professional required, developing performance standards (parameters), and defining indicators to assess levels of command.

Two standardized examinations, each consisting of 120 multiple choice items, have been used. One tests knowledge and skills in teaching practice; the other intellectual skills and professional ethics.

Contestants are graded in each exam on a numeric scale (70 to 120 points) and further classified into three groups (A, B, and C). A minimum of 100 points on each exam is required for success; the total number of points obtained is the criterion for classification in group B or C.

3. The General Law of the Professional Teaching Service mandates specification of professional profiles, parameters, and indicators to reflect teaching competences and the ability to improve student learning achievement. These standards also serve as a reference in the development of tools to assess permanence, promotion, and recognition within the SPD. The aim is to ensure that those who obtain better evaluation results remain in the profession, receive recognition, or are promoted to higher-level, better-paid positions (SEP-CNSPD, 2016a).

Thus, individuals in Level I, Group A are not eligible, while the rest meet the standards and may be assigned to a position. Those ranked highest get to choose their preferred location and school first. Table 3 describes the requirements to enter the profession and, after two years, secure an open-ended contract.

Table 3. Entry to the teaching profession: Eligibility and evaluation process

Requirements	Process	Instrument	Selection	Consequences
Normal school degree or university bachelor's degree	Registration for examination	Standardized multiple-choice exams	<ul style="list-style-type: none"> Level II or III: meets satisfactory profile and parameters Group B or C: ranked according to numeric grade on scale Assigned to position in school 	<ul style="list-style-type: none"> Probation period Two years with mentoring Evaluation after completion of each year Open-ended contract

Source: IBD (2016).

The evaluation mode in this case is cumulative, as the final result is determined by the score on each of the examinations. Successful candidates are ranked and those at the top of the list are offered contracts; hence selection is norm-referenced.

Beginner teachers are differentiated by the level of school they will teach in. While pre-school and primary teachers work a complete morning or afternoon session, those in secondary are entitled to contracts for the number of teaching hours required by their specific subject. At the beginning of the 2013/2014 school year, half the teachers in general secondary schools worked by the hour (INEE, 2015a).

First years of the teacher career

New entrants into the profession are mentored for their first two years of practice. As already noted, those who perform satisfactorily according to their first and second year evaluations are offered open-ended appointments. If the beginner teacher fails to meet the required standards, the contract may be terminated without any responsibility or severance pay (DOF, 2013a). Figure 4 illustrates the process of evaluation for new entrants.

Figure 4. Evaluation of beginner teachers



Source: Zorrilla and Bracho (2015).

3. Detailed description of teacher career models and evaluation modes

There are three parts to the organization of teacher careers in Mexico. These correspond to three models: single salary schedule, salary progression based on appraisal, and career ladder. The same career structure applies to both primary and secondary teachers, and to recently recruited teachers as well as those already in a post.⁴

The structure is based on four key concepts, which are related to the career models indicated above:

- entry into service,
- permanence (continuity),
- promotion, and
- recognition.

The results teachers obtain in the evaluation are, in practice, the organizing principle of their careers. *Table 4* describes the teacher career model.

Table 4. The teacher career model in Mexico under the 2013 reform

Entry into service	Permanence (continuity)	Promotion	Recognition
<ul style="list-style-type: none"> • Diagnostic evaluations after the first and second years determine whether a teacher can stay in the profession 	<ul style="list-style-type: none"> • Continuity of teachers' service and respect for their constitutional rights are emphasized • Teacher performance is systematically evaluated and corresponding measures are taken 	<ul style="list-style-type: none"> • Promotion by incentives (salary progression based on appraisal)* • Promotion to managerial position (vertical mobility) • Promotion by additional hours* • Promotion to pedagogical support personnel position (horizontal mobility) 	<ul style="list-style-type: none"> • Temporary tutorship or pedagogical support position (three or four year positions associated with a monetary incentive) (horizontal mobility)

* Mexico defines salary progression based on appraisal and promotion by additional hours as types of promotion for teachers. However, the definitions used in this research project specify that promotion entails additional responsibilities. As that is not the case for these two career aspects, in the remainder of the report they are not referred to as promotion.

Source: Based on DOF (2013a).

3.1 Single salary schedule

By law, for every five years of effective service teachers receive a premium addition to wage payment. The amount is fixed annually by the federal government and the SNTE.

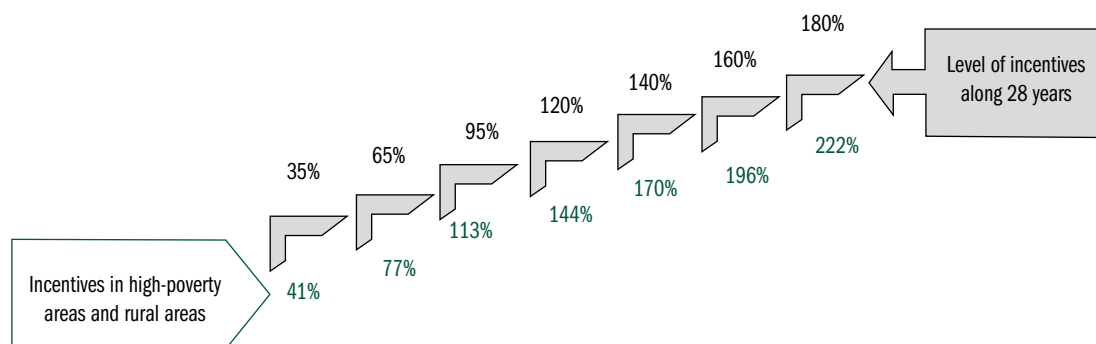
3.2 Salary progression based on appraisal

Under the reform, the system of salary progression based on appraisal is called promotion by incentives. The salary scale consists of seven grades, the topmost of which can be reached after 28 years of uninterrupted service as a teacher, as *Figure 5* indicates. It is important to note that salary increments are higher in high-poverty and rural areas.

4. Teachers who were already in service before 2013 had to undergo performance evaluation. They had three opportunities to succeed. If they failed to do so, they were removed from teaching and assigned to administrative duties, with the same salary and benefits as before.

Figure 5. Promotion by incentives: Salary scale and incentives (% rise relative to starting salary)

A higher level of incentive, higher level of performance required
 Programme consists of seven levels with a percentage of assigned incentive.



Source: SEP-CNSPD (2015a).

Every four years, teaching professionals are evaluated and thereafter become eligible for an incentive increase in salary. The incentives are initially temporary but can eventually become permanent upon successful future appraisals (SEP-CNSPD, 2015a). It is understood that the higher the incentive, the higher the level of performance expected.

In addition, teachers contracted for weekly hours who achieve a good evaluation have the possibility of earning more by teaching additional hours. As noted earlier, in secondary schools the majority of professionals teaching specific subjects are contracted by the hour. If these teachers achieve outstanding results in their evaluation, they may receive more hours, which could result in them teaching their subject to more groups in the school, resulting in an increased salary. Assignment of extra hours also depends on schools' needs, however.

Factors taken into account in deciding if a teacher receives a pay rise

Evaluations are key in determining teachers' eligibility for a pay increase and whether they have to undergo additional evaluation. Table 5 shows the four possible outcomes of the teacher evaluation process.

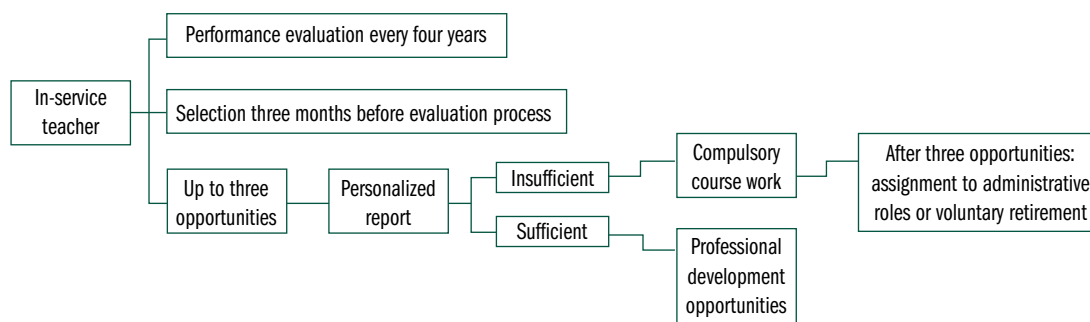
Table 5. Possible outcomes of teacher evaluations

Category (determined by the evaluation results)	Implications for teachers
Insufficient (<i>no suficiente</i>)	Cannot participate in the salary increase programme, are required to take courses, and must undergo a new evaluation within the next year.
Sufficient (<i>suficiente</i>)	Continue at their current level for four years and participate in recommended professional development activities.
Good (<i>destacado</i>)	Are allowed access to the first salary increment and their current salary level is confirmed.
Outstanding (<i>incremento</i>)	Move up a level on the salary scale.

Source: SEP-CNSPD (2015b).

To receive a pay increase, eligible teachers must obtain outstanding results, the highest level of evaluation outcome (it actually shows that their results improved since their last evaluation). At the other end of the rankings, a teacher with insufficient results whose performance does not improve in the next evaluation can be dismissed.

Figure 6. Trajectories of the teaching profession under the SPD General Law



Source: Based on Zorrilla and Bracho (2015).

In 2015, a total of 116,977 teachers were meant to participate in the performance evaluation process. Of these, 11.7 per cent failed to show up and 12.4 per cent were classified as insufficient, 33.2 per cent as sufficient, 35.7 per cent as good and 7 per cent as outstanding (SEP-CNSPD, 2016c).

Requirements to receive a salary increment

Each step on the salary scale is associated with particular requirements, measured through performance indicators. The performance requirements increase when teachers seek to achieve a higher increment.

Whether teachers meet the requirements is determined by the evaluations, which focus on five key competences:

- knowledge of students and what they should learn,
- organization of teaching and of relevant didactic interventions,
- ability to reflect on teaching practices and adapt them to student needs,
- knowledge of legal and ethical responsibilities, and
- participation in school and community activities that create an environment conducive to student motivation and success.

Evaluation tools: The tools used in the evaluations are (a) report of professional responsibility, issued by the principal or other supervisor; (b) portfolio of teaching evidence, consisting of student work examples; (c) examination on pedagogical knowledge and didactic competence; (d) lesson planning examples; and (e) content knowledge examination by subject (SEP-CNSPD, 2016b). Each tool helps evaluators arrive at the indicators that are associated with each of the five competences indicated above.

Evaluators: Evaluation is completely external and centralized, with a marginal role assigned to school authorities. Exams are graded automatically; portfolios and lesson plans are evaluated by teachers and principals who are trained and certified by the INEE and have at least three years of experience. Teachers who serve as evaluators typically complete a 60-hour online course and pass a certification exam. They work in pairs, reviewing the documents online and assigning grades according to specified rubrics contained in a guide developed by the INEE.

Cumulative evaluation: Point calculation involves a complicated technical procedure. A key aspect to note is that the final score, which determines which of the four result categories teachers are assigned to (Table 5), depends on how teachers succeed in each evaluation tool. The evaluation is therefore cumulative.

Norm-referenced evaluation: Teachers' evaluation results are used to rank them according to score, in descending order. By law, salary increments depend on available financial resources; i.e. the evaluation is norm-referenced – only the top-ranked teachers receive the

salary increase and their portion depends on the expected budget. Those who are eligible for a salary increase but do not obtain it for lack of financial resources can participate in the evaluation the following year. However, in the two last evaluation rounds before this report was written, all teachers who were eligible for salary increments received them. Thus, in practice, these evaluations turned out to be criterion referenced rather than norm referenced.

3.3 Career ladder

Horizontal mobility

Teachers can be promoted to positions as pedagogical support personnel, in which they are responsible for providing counselling, tutorship, and support to other teachers. In these roles they are expected to improve education quality by carrying out tasks of a pedagogical or technical nature that a school or subnational authority assigns to them (DOF, 2013a).

The selection process consists of a public competition (for details of the procedures followed, see below under ‘Vertical mobility’). The teachers selected go through a two-year induction period, after which they are evaluated to determine whether they stay in the position. Only those whose evaluations are successful are permanently assigned to the job. Those who do not succeed go back to their previous positions. During the induction period teachers receive a temporary incentive and continue with their teaching jobs.

Another option considered horizontal mobility, under the concept of ‘recognition’ in the new career structure (*Table 5*), which would allow teachers and principals to be temporarily promoted to various roles providing tutorship, counselling, technical advice, support, or project coordination. After three years in these roles, they would return to their previous duties (DOF, 2013a). At the time of the research for this report, the option had not yet been implemented, but its intent was to promote expertise sharing among teachers. Candidates would be selected through evaluation by decision-makers who would vary according to the position concerned.

Vertical mobility

Multiple vertical mobility positions are available to teachers: principals, vice principals, extracurricular activity coordinators, supervisors, regional chief supervisors, academic chiefs, and pedagogical consultants.

A set of standards is defined for each position, taking into consideration the level and type of service. There are over 60 highly prescriptive sets of profiles, parameters, and indicators.

Teachers are promoted to these positions via an open, competitive, public process, which aims to ensure that only candidates with exemplary knowledge and skills are chosen.

Eligible teachers are those who have at least a bachelor’s degree and two years of uninterrupted service at the education level or modality for which they are applying.

All vacancies, at both the national and subnational levels, are submitted to the competition, which has three key phases: (a) announcement of competition, pre-registration, registration, and review of teacher documentation; (b) competitive examination; and (c) grading of the candidates, establishment of descending-ranking lists, and assignment of positions.

Tools: Candidates take two standardized multiple-choice examinations: one on knowledge and skills of professional practice, the other on intellectual skills and professional ethics (SEP-CNSPD, 2016b). Different exam versions are used, depending on teachers’

specialization, modality, and teaching level. Standards clearly indicate what competences are evaluated by each exam.

Cumulative and norm-referenced evaluation: Although calculation of the score involves a complex technical procedure, the essential aspect of the cumulative assessment is that the final score is derived by adding up the scores received in each phase of the evaluation. The candidates classified as suitable are ranked according to their overall score, and the best candidates get the positions. The evaluation is therefore norm referenced. The SEP oversees administration of the ranking lists, while subnational authorities ensure that all legal processes of the public competition are respected.

Evaluators: The examinations are centrally administered.

In 2015, 41,069 teachers participated voluntarily in the public competition and over half were found suitable (SEP-CNSPD, 2016c). It is important to emphasize that participants in all competitions receive detailed individual results. Personalized reports highlight areas of opportunity for the individual, while group results provide the information needed to plan for future professional development options. Detailed information on available professional development options was recently released. Some 500 online and mixed programmes designed by universities, normal schools, research centres, and other teacher training agencies were included (SEP, 2016a).

4. Implementation of the reform

Unexpectedly, implementation was the most polarizing aspect of the 2013 reform. It generated strongly divided opinions among specialists, teachers, and the public. The INEE member interviewed said, ‘The central topic is implementation. That is, there is a radical change in the way that teacher careers are managed from entry to retirement. I had calculated that Mexico would need some 15 years to fully install the new career models, because there are many routines and procedures involved. We need to assume that this is not magic; you need to carefully dismantle the corporate arrangements that for half a century determined the entry, promotion, permanence, and recognition. This reform is not only needed but urgent.’

4.1 Administrative and management challenges

Complexity of the standards teachers are judged against: One of the most problematic aspects of the teacher career model under the 2013 reform was related to the extreme complexity of the profiles, parameters, and indicators that teachers were evaluated against. The INEE member acknowledged as much: ‘This is one critical area in which we need changes. The complexity is such that teachers are unable to clearly understand what we are evaluating and how. It is my impression that the younger, new entrants to the profession are better equipped to understand, but those in service are, in principle, against standardized exams. When you have external and high impact evaluation processes, there is no way you can avoid standardized exams.’

This complexity also created difficulties for the evaluators. ‘At the INEE we have made many efforts to prepare evaluators capable of working with rubrics. Two evaluators review the portfolios, the lesson plans, or the rest of the required evidence, considering each set of standards. This is very demanding work but it allows us to bring a qualitative perspective into the process.’

Standards too far from actual teaching practices: It was pointed out that the design of the teacher career model should contribute to the quality of teaching and learning, and hence the characteristics deemed desirable for teaching professionals should be close to the actual practices of teachers and school authorities, rather than determined through the abstract prescriptions found in the profiles, parameters, and indicators (IBD, 2016).

Issues related to standardized evaluation tools: It has been argued (Mancera and Schmelkes, 2010; INEE 2015b, 2016) that performance evaluations should assess teaching practices by way of teacher observation. The use of standardized instruments facilitates massive processes, classifications, and rankings, but cannot capture the complexity of teaching across diverse contexts.

Resistance to change: The 2013 reform attempted to introduce more transparent practices into the teacher career management system. This necessarily entailed an end to certain benefits and privileges for some, which naturally caused resistance. The INEE member noted: ‘With the evaluations we are discovering the chaos, the corruption, and the general disorder that prevails precisely in the management of teacher careers; that is why it is so difficult to promote the changes. Resistance comes from actors in a system in which they obtained power, influence, and illegal benefits. The reform will benefit children but it will also end privileges enjoyed by many.’ The SPD national coordinator acknowledged that resistance existed but remained positive about the future: ‘There are many enemies of the reform, even within the system, but I am confident that it will prevail because it is now the right response to a society that was already unsatisfied with education results. I am betting on parents and society at large.’

Lack of a functional information system: The lax controls and violation of existing rules in teacher career management show that a more robust information system is needed to ensure better identification of positions and vacancies. Although progress has been made in this direction, it will take some time before accurate information is consolidated and systematically updated. There have been public advertisements for new entrants for a number of positions, by level and type of service. Since databases are incomplete, outdated, or inaccurate, however, there is no way to verify if these are all the available opportunities or if education authorities have failed to report some vacant and new positions.

Difficulties in informing teachers selected for evaluation: Notifying individuals due to undergo evaluation (over 200,000 at time of writing) has been highly challenging. The difficulty is in part due to technical issues related to information distribution, and in part to the fact that some teachers do not want to be evaluated and therefore resist communication efforts. This is not a trivial matter, since without certification that the teacher was summoned, timely legal procedures in case of failure to participate are inapplicable.

Evaluation data collection and conservation issues: The extensive documentation, portfolios, and other evidence uploaded to a specially designed online platform have presented serious technical problems during the performance evaluation process. There is some scepticism as to security in regard to the standardized examinations and more serious doubts with respect to the authenticity of uploaded evidence.

Lack of technical preparation of operational staff: A major challenge was to train enough evaluators and operational staff to work with the new system. This issue has caused errors in the processing of applicants' documentation, in password distribution, and in orientation, as well as other technical and logistical problems.

Inadequate professional development: Mexicanos Primero, an influential civil society organization representing business and private interests, has been interested in keeping up the pace of the evaluation process and in connecting the results to teacher professional development. In a position paper (Calderón, 2016), the group argued that the courses, training sessions, seminars, and workshops offered thus far were irrelevant and failed to understand the teaching profession and the challenges of teaching practice in adverse contexts. The organization's policy and implementation recommendations suggest using information derived from the performance evaluations to design and sustain a comprehensive national programme of teacher professional development involving not only courses but also school-based collaborative learning opportunities.

Multiple teacher appointments: Some teachers in Mexico have more than one appointment (e.g. are employed half time as a principal and the other half as a teacher). This is not against the law as long as the maximum work hours are respected. However, in such situations, the calculation of incentives becomes more complicated. The reform was not clear about how to manage situations such as these, but they need to be addressed.

More generally, SNTE leaders insisted that a key drawback of the reform was 'the institutional limitations, the inability to efficiently and securely implement processes that determine teachers' lives'.

The INEE admitted that the system had significant challenges, and was considering potential modifications. Evaluation modes, evaluators, and tools were being reviewed. At the time of writing this review was still under way and it was not clear what changes might be proposed.

4.2 Financial challenges

The SEP did not see any major financial challenges hindering the reform or arising in the near term. There was a perception (albeit not a formal projection) that ‘if we better manage the resources already available, we should not have any financial pressures’.

The INEE member agreed, saying that even without a financial projection, ‘I believe that the system has enough resources and if there is good administration, funding the new career models will not be a problem. It is a matter of changing behaviours; all of us ... have sort of a cultural problem with the administration of public resources’.

Nevertheless, several interviewees acknowledged that highly complex standardized evaluation procedures were costly, as they required substantial infrastructure investment as well as training of evaluators.

4.3 Participation and communication

The key implementation weaknesses of the career structure reform were a lack of teacher buy-in and inadequate communication and participation channels. Although the SNTE leadership was consulted, and participated in the structure’s design, the general perception was that teachers were marginalized in the decision-making process.

Influential actors expressed objections and demands related to the reform. A prominent group of education researchers circulated a petition which was ultimately signed by more than 8,000 teachers and educators (Gil, 2015). The petition argued that the reform lacked an educational project and a shared vision, and hence could not achieve the kind of profound transformation the Mexican education system needed in terms of fostering equity, inclusion, and good citizenship. Much of the criticism of the reform emphasized the exclusion of teachers from its design. Critics also saw the evaluation procedure as punitive and not suited to improving teaching practices.

The SNTE remained a key ally of the government. The union is not monolithic, however; subnational sections of it actively, and even violently, expressed their objections, and succeeded in opening parallel dialogues with top-level local and national authorities.

Some academics emphasized that the absence of social dialogue revealed a lack of understanding of education on the part of the government. One said in an online magazine interview that ‘there is not a single example of an educational transformation that has prospered without the country’s teachers. Teachers are not an object to be transformed, an input that you grade and evaluate; they are potential allies of the reform. It seems that Mexican teachers will adapt or resist evaluation but without committing to change’ (Manuel Gil Antón in Cano, 2016).

These issues seriously threaten the viability of the reform and contribute to demands for its modification.

Table 6. Key implementation aspects of the teacher career structure

Administration and management	Coordination
<ul style="list-style-type: none"> • Complexity of the competence framework • Standards too far from actual teaching practices • Mass evaluation incapable of capturing the complexity of reality • Resistance to change • Lack of a functional information system • Difficulty notifying teachers about evaluations • Evaluation data collection and conservation issues • Lack of technical preparation of staff 	<ul style="list-style-type: none"> • Lack of teacher involvement in policy design • Weak communication channels resulting in strong teacher resistance

Source: Based on IBD (2016).

5. Perceived effects

5.1 Motivation and satisfaction

Thus far there has been no evidence as to whether the two teacher cohorts that entered the profession after the reform took effect were more satisfied and motivated than their colleagues. More importantly, there is no evidence of the impact of their competences on student learning. An eventual career management database and strategy of personal follow-up conducted by assigned mentors would allow for a better understanding of the reform's effects.

Still, at the beginning it seemed the reform was welcomed and positively received. Some teachers said they favoured the selection and performance evaluations. The INEE member noted new teachers' enthusiasm, saying that while it was 'indeed too soon to assess the effects on teacher motivation and retention',

I am already noting some impact among new entrants: in meetings or informal conversations they are happy to tell me that they are teachers of the reform; they want me to know that they obtained the position on their own merit. That is really the big change. How long this enthusiasm will last is hard to predict. ... These teachers are at the end of their second year. Soon they will be evaluated and those results determine whether they will continue their careers. Then we will really see.

Nevertheless, the reform generated strong dissatisfaction among some teachers. The perception of the new rules as authoritarian, punitive, and repressive was pervasive among many teachers, academics, and members of the general public (Backhoff, 2016; Cano, 2016; Pérez, 2016). Beyond strong opposition to the idea of 'merit' being the criterion that defines careers, there was a valid objection to the concept of standardization in a country defined by both its diversity and inequality. In addition, teachers strongly disliked the stringent mandatory evaluation, and the possibility of dismissal for teachers receiving poor evaluations.

One SNTE member noted that 'individual incentives compromise solidarity among teachers and commitment to their students. It would be best to increase salaries and reduce incentives, possibly emphasizing the symbolic rather than personal economic gain'.

The problems that generated the strongest dissatisfaction among teachers were related to poor implementation. The challenges noted in *Section 4* negatively influenced teacher satisfaction and attitudes towards the reform.

Another factor influencing teachers' overall satisfaction and motivation was the pressure caused by other education reforms adopted at the same time (e.g. changes in curricula).

Finally, it appears that the summative purposes of the performance evaluation undermined its formative aspect. A key aim of the teacher career reform was to evaluate teacher performance so as to provide professional development options according to individual results as a way to stimulate better practice and increase student learning. However, the role of evaluation results in determining career progression obscured this central objective of the policy. Teachers classified as insufficient tended to consider compulsory courses and tutorship as requirements to preserve their jobs rather than useful resources. On the other hand, teachers who got better results felt the development options available were not adequate for addressing teaching challenges in their specific contexts (SEP, 2016a).

5.2 Attraction and retention

It is difficult to make firm pronouncements on the perceived effects of the reform on teacher attraction and retention, as it has been in place for a relatively short time.

Moreover, other factors affecting attraction and retention need to be considered more fully. Still, some actors were optimistic about the potential of the reform. The SPD national coordinator said, for example:

The fact that the number of applicants to enter into the professional service keeps growing is a good indicator of the attractiveness of the career. The young cohorts see the advantages of personal and professional opportunities of growth, not only income but in terms of the satisfaction of obtaining benefits through their effort and merit instead of depending on favours based on relations and exceptions.

All interviewees said they believed the reformed career model would have an impact on teachers' performance, given time. The SPD national coordinator argued:

The scheme is attractive to teaching professionals because they are aware that personal effort will be compensated systematically. There is no doubt that the inertia produced by the notion that you had automatic career progress, no matter what, is already being displaced in favour of a merit-based system. This career model is by far superior to others and has the potential to yield better educational results.

Both the SPD coordinator and the INEE member maintained that the key issue was continuity and effective implementation. For the former, 'the merit-based career models will make the profession more attractive and motivating if the norms and regulations are strictly respected'. The latter stated: 'There is no other way to change the Mexican education system, because competent teaching professionals are indispensable to the innovation of teaching practices in classrooms and schools. If we do not persevere and act with determination ... it would be terrible for the country and for teachers.'

Regarding retention, several studies have shown that most teachers in Mexico remain in service all their lives and a large proportion of urban teachers and principals stay in the same school (INEE, 2015a). The new career model's focus on providing incentives and continuous professional development over the career could eventually make the profession more attractive.

However, it should be noted that teaching does not always attract candidates for the best reasons, as many join because of a lack of other employment opportunities. They are often not trained to be teachers and see teaching as a temporary occupation. The attractiveness of the teaching profession thus also depends on the wider context and job availability in other sectors, which further obscure the effects of the teacher career structure on attraction and retention.

Finally, implementation challenges severely damaged the reputation of the reform and its capacity for positive results.

Conclusion

The main strength of the teacher career structure under the reform was its merit-based route to entering the teaching profession and to progression within it.

As one leading expert pointed out, while the reform had the potential to promote development of the profession and end corruption and discretion in allotment of positions, the cultural change involved promised to be slow and conflictive (Arnaut, 2016). Objections to the reform were related not only to job stability and opportunities for mobility but also to what was seen as the punitive nature of merit-based evaluations. Critics saw such evaluations as incapable of assessing the complexity of the teaching profession and its practice in highly differentiated contexts. Implementation and management were weak, and the weakness was exacerbated by the challenge of trying to carry out a reform of this scale in such a large and diverse country. In turn, the difficulty of implementing a complicated reform and the many resulting challenges contributed considerably to teacher dissatisfaction.

A slogan on a poster at a protest against the reform summarized the issue succinctly: ‘Evaluation, yes, but not like this.’ Teachers wanted a performance evaluation process that was context-sensitive, rather than standardized, to better capture what individual teachers do in their particular circumstances. The expectation was that such measures would enable the design of stronger, more relevant professional development programmes and collaborative learning options. Evaluation methods that have been proposed to provide better feedback and support to teachers include direct observation and interviews with the teacher, the principal, and parents.

The SPD national coordinator acknowledged the need to address areas of opportunity but maintained that perfecting the information and technical support systems should be the short-term goal. He emphasized ‘better coordination and full cooperation of decision-makers and public servants’. Most interviewees also recognized the need to include larger and more diverse groups of school authorities and teachers in the redesign of profiles, parameters, and indicators as an avenue to improve the specification of what teachers are expected to know and be able to do (Díaz Barriga, 2016). Although some progress was made in these directions, radical opponents made arguments in favour of discarding evaluations altogether.

Clearly, by 2016, teacher evaluation processes and the design of lifetime teacher careers were in need of critical revision (IBD, 2016; Guevara, 2018), while teaching professionals expressed growing frustration (Loyo, 2018) as they perceived that the profession was under attack and was being unfairly blamed for unsatisfactory learning results.

Recent analyses and position papers (Pérez, 2016; 2017) elaborate on the causes of the profound discomfort among teachers and their representation, even as official communications recorded that the number of participants in the complex evaluation processes kept growing and logistical aspects improved considerably (Granados, 2018).

The new president, Andrés Manuel López Obrador, had included in his campaign manifesto a promise to cancel the 2013 reform on the grounds that it was punitive in nature. After his landslide victory in the July 2018 election, it was no surprise that the legal process to do just that started very soon after he took office.

There are very high expectations among teachers about the future of the profession and the reinstatement of the social appreciation it deserves. Now it is a matter of learning from recent experience and moving on to build policies that allow key actors to define and accept more effective avenues to the development of teacher careers.

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Teacher career reforms in Mexico

In 2013, the newly elected Mexican government launched a series of education reforms that placed teacher career policies centre stage. The provisions sought highly competent teaching professionals who would be recruited and promoted under a complex scheme of merit-based evaluations. As new definitions of career models and evaluation processes were developed, conflict and tensions increased between teachers and governmental officials, resulting from implementation issues and from the contrast between the new systems and the previously established practices.

This country note was conducted within the framework of an international research project on teacher careers implemented by the UNESCO International Institute for Educational Planning (IIEP). It examines Mexico's teacher career policy reforms and the tensions they produced. This publication further explores the weaknesses in implementation which contributed to these tensions as well as the arguments raised by teachers and other major stakeholders through in-depth interviews and a review of pertinent documents and statistics.

About the author

Sylvia B. Ortega Salazar is a sociologist and educator, combining work in academia and public service over a three-decade career. She has served twice as Vice-Minister at Mexico's Secretaría de Educación Pública and has presided over the Universidad Pedagógica Nacional and the Universidad Autónoma Metropolitana (Azcapotzalco). She is a member of UNESCO's Teaching Task Force, the OREALC-sponsored Teacher Strategy, the governing board of the UNESCO Institute for Lifelong Learning, and the Academic Council of the Universidad Iberoamericana.



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