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The Appointment of School Leaders in Mexican Primary Schools: an Exploratory Study of the System of Promotion

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Abstract

This study explored the Mexican system to appoint school leaders from a perspective that could consider its positive aspects and as well as its shortcomings. This research was framed as an exploratory case study. Three types of participants were interviewed: five aspiring heads, twelve incumbent heads, and four administrators of the promotion system. Thematic analysis was the procedure adopted in the analysis of transcripts. The research was carried out to the highest ethical standards in educational research as anonymity, confidentiality, and respect for the participants were observed all the time. The study revealed that there are some positive aspects in the Mexican system that could enable its consolidation. The study found also a need to upgrade the current system of promotion since school leaders in Mexico are appointed by a system in which its regulations and procedures were promulgated more than 40 years ago. The current system of promotion does not enable the appointment of prepared school leaders. The findings revealed a need for leadership preparation as a prerequisite for participants in competitions for deputy headships, headships and for those who are already holding a leadership position.

Keywords: promotion to headship, appointment of school heads in Mexico, leadership preparation and development

El Nombramiento de Directores en las Escuelas Primarias Mexicanas: un Estudio Exploratorio del Sistema de Promoción

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Resumen

Este estudio exploró el sistema mexicano de nombramiento de directores escolares desde una perspectiva que pudiera considerar tanto sus aspectos positivos como sus deficiencias. Esta investigación fue enmarcada como un estudio de caso exploratorio. Se entrevistó a tres tipos de participantes: cinco aspirantes al puesto de director escolar, doce directores en el puesto, y cuatro administradores del sistema de promoción. El análisis temático fue el procedimiento utilizado para el análisis de datos. La investigación se llevó a cabo cuidando aspectos éticos como el anonimato, confidencialidad y respeto por los participantes. El estudio reveló que hay algunos aspectos positivos en el sistema mexicano de nombramiento de directores que podrían favorecer su consolidación. El estudio también encontró la necesidad de actualizar el sistema de promoción debido a que los directores escolares son promovidos al cargo mediante procedimientos y reglamentos que fueron promulgados hace más de 40 años. El sistema actual no favorece el nombramiento de directores escolares preparados para el puesto. Los resultados revelaron la necesidad de establecer preparación para el puesto como un prerrequisito a los aspirantes a puestos de subdirector y director, y para aquellos que ya están ejerciendo el puesto directivo.

Palabras clave: promoción a la dirección escolar, nombramiento de directores escolares en México, preparación y desarrollo del liderazgo

There is a growing body of evidence that school leadership has a positive impact on student outcomes for children and young people second only to the influence of teachers in the classroom (Leithwood et al., 2006). Governments around the world are devoting unparalleled resources to develop aspiring school leaders, as well as those who are already in the role (Leithwood and Day, 2007; NCSLCS, 2009). School leaders play a key role in the way education is delivered since they can influence the conditions that help or limit educational practices in schools. There is evidence from research that school leaders influence the activities that are at the heart of educational endeavours such as teaching and learning. It has been demonstrated that after the classroom teacher, heads are the next most influential factor in improving student outcomes (Owings et al., 2005). There has been verification of how in schools with effective school leaders, teachers improve their practices at a greater pace than those with less effective leadership (Beteille et al., 2009). This is why one of the key aspects that educational systems have implemented to strengthen school leadership has been leadership development and preparation. It is reported that some countries offer preparation at all stages of a school head's career e.g. pre-service, induction, incumbency, and other countries providing at least one or two (Pont et al., 2008; Huber, 2008). In this regard Bush (2008) has suggested that headship is a specialist occupation that requires specific preparation. It has been demonstrated that effective school leadership emanates from prepared heads (Matters, 2005; Thomas and Bainbridge, 2002). Moorosi and Bush (2011) found that give preparation no attention means schools could be placed in the hands of unqualified personnel. Daresh and Male (2000) found the culture of shock moving into headship without previous preparation.

In addition to preparation and development of potential school heads, implementing processes of choosing effective school leaders is one of the most significant decisions educational systems need to make. Most of the research conducted on the practices of appointing school leaders has been carried out only in a few countries. There is not a wide landscape of practices implemented elsewhere at an international level and the effects these practices have on appointing competent school leaders. That is the case of the processes of accessing headship in Latin America. This research was conducted in the state of Chihuahua Mexico to examine the current process to appoint school leaders established in Mexico by a programme known as *the Escalafón*, a vertical system that assigns leadership positions in schools and the educational

system based on the accumulation of points. This research intended to deepen the understanding of the strengths and shortcomings of the programme based on the perceptions of administrators of the programme at state level, teachers who are currently participating in competitions for a leadership post, and incumbent heads who have been appointed by the point-based system.

The Appointment of School Heads

There is not a standard process to appoint school leaders since each country has tailored its own practices based on their contexts. Barber et al. (2010) conducted a study in Canada, England, United States, New Zealand, The Netherlands, Singapore, and Australia aimed to analyse the practices that the world's top school systems are implementing. In the study it is reported that "the selection and appoint process varies widely across school systems" (p. 13). It is evident that even in countries and regions in which the strengthening of school leadership has been a priority there are differences in the procedures to appoint school leaders. For instance, Alvarez (2003) points out that in the European Union there are several processes to appoint school heads such as national competitive exams, public competitions, or selection committees. Bryan (2008) identifies two approaches in the appointment of school leaders, the first based on criteria that have little to do with the position (kinship, filiations, partisanship, favouritism) described as *particularism*, and the second approach in which school leaders are selected based on objective criteria that emanate from some merit based assessment (prior performance, satisfaction of pre-established criteria, completion of a pre-service or in-service programme; participation in a carefully constructed mentor programme) defined as *universalism*.

In the case of Mexico the official process to appoint school leaders adhere to the principles of universalism given that leadership positions are assigned in a selection process. In compulsory education composed by the educational levels of preschool, primary, and middle education, school leaders are appointed by a vertical system called *the Escalafón* established in 1973, which is currently dictating how school leaders should be appointed. In this system, teachers pursuing leadership positions just have to accumulate points in four main aspects: professional preparation (qualifications and continuous professional development), aptitude, years of service, and discipline and punctuality). The system does not require previous compulsory preparation

for headship to participate in competitions, and the system does not assess potential to lead and manage a school since promotions to leadership posts are assigned to the person that has accumulated more points. The system is controlled by the ministry of education (SEP) in partnership with the teachers' union. The programme is established with the same organisational structure in each of the 32 states and is administered jointly by the ministry of education and the teachers' union in the Joint National Commission for Teacher Promotion.

Educational specialists in Mexico frequently adopt a critical position when assessing the system of promotion. In this regard, Cordero et al. (2008) commented that newly appointed heads have accumulated throughout their career list of courses and workshops little related with their role. Canales and Benzie (2009) point out that usually under this system the journey to headship takes years for the tedious task to accumulate points. Slater et al. (2006) described that a teacher must play the game of earning points and let time pass to gain seniority to become a school leader in Mexico. Another aspect reported by the literature is the element of patronage seemingly present, Slater et al. (2006) state that "there is little trust in the Escalafón because no one really knows if the people hired are the most qualified or really have the greatest number of points" (p. 72). Further they comment: "people know of many incidents of malpractice when positions are directed away from the person with the most points" (p. 72).

There also seems to be present the influence of the teachers union to favour the appointment of its supporters. Arnaut (1998) points out that the union has always aimed at a large representation in the positions of leadership in schools as a mean of political control of staff. Raimers (2006) reported that the teachers' union plays a very large role in hiring, retaining and promoting teachers. This influence is seemingly favoured by current educational policy that gives the union the power to make decisions beyond the functions of a union (Hevia et al. 2010). This situation has generated the incorporation of new teachers to the profession based on political affiliation to the union in which sometimes occurs the selling, buying and inheriting of posts (Guevara and Gonzalez, 2004; Barrera, 2009). For instance, in the State of Chihuahua, Muñoz (2005) asserts, based on an interview with the first governor of opposition that previous to 1992 there had not been a notification of competition for a promotion to a headship in public schools in 14 years. In this regard, Hevia et al. (2010) point out that the appointment of heads in

Mexico is based on the relationship that those seeking a leadership post have with the teachers' union more than their pedagogical, leadership, and managerial skills.

The Mexican Educational System

The Mexican compulsory education enrolls around 35 million students (87 percent of all students in the country) and employs approximately 2 million teachers (SEP, 2012). The ministry of education and the teachers' union are the two main actors in the education policy arena. By law, all school personnel in all public schools belong to the teachers' union. Governance is centralised with the ministry of education setting the academic calendar, curricula, grading scales, graduation requirements, distributing free textbooks and, hiring and firing school personnel. Schools, teachers and school heads have little autonomy in the educational system. This centralisation is also present in the appointment of school leaders since regulations and procedures are dictated at national level.

The Study

This research was framed as an exploratory case study given that this design enabled to gain an in-depth understanding of the perceptions of aspirant school heads, incumbent heads, and government and union officials in relation to the process implemented in Mexico to appoint school leaders. The research explored the strengths and the areas of possible improvement of the current process implemented. The most suitable approach to explore these aspects was through a qualitative framework using the methodology of case study. Case study is the most suitable approach for exploratory research (Rowley, 2002), and this type of studies are well suited in areas of research in which existing theory and knowledge seems little researched (Eisenhardt, 1989). On this point, the process of appointment of school leaders in Mexico has not been researched from an empirical perspective. Yin (1994) also stressed the need to use multiple sources of data collection in case studies. However for Stake (1995) a case study is more related to the uniqueness of the object of study than the number of methods or techniques used for data collection. This study concurs with Stake's (1995) viewpoint of uniqueness of a case study; however, Yin's (1994) perspective was also taken into consideration in order

to ensure trustworthiness of the data collected. In the present study, the element of multiple perspectives was regarded as a priority in order to have a more sound discernment when reflecting on the topics addressed; this was implemented by interviewing participants who could have a different perspective of the case being studied. The participants interviewed were four members of the commission on promotion, two representing the ministry of education and two the teacher's union, five teachers pursuing a headship post, and twelve headteachers. The study was conducted in the Tarahumara region of the state of Chihuahua, Mexico in primary schools. Thematic analysis was the procedure adopted in the analysis of interview transcripts. The research was carried out to the highest ethical standards in educational research as anonymity, confidentiality, and respect for the participants were observed all the time.

Findings and Discussions

1. The System's Strengths

The 21 participants shared their viewpoint on the strengths of the ladder-merit system used to appoint school leaders in Mexico. After a thorough analysis the following themes emerged as relevant in this regard.

Increased trust in the system. In Mexico all teachers teaching in compulsory education are entitled to pursue a leadership posts via the point-based system. The majority of respondents (n= 17) mentioned that they have plenty of trust that the appointment of leadership posts such as deputy headships, headships, and higher posts are carried out following the established procedures.

"Now more transparent evaluation processes; trust that rules are strictly observed. The points in a competition are awarded in strict observance of the aspects that must be assessed" (TSH3)

"The main strength is its transparency. It was that way in my case, yes, I share what I experienced" (HT9)

They asserted that the commission on promotion is a trustful institution that assigns posts in accordance with the law and established procedures. These perceptions contrast with the negative stigma reported in the literature of how Mexican school leaders in the past seemed to be appointed without following the established norms, and with influence of the teachers union. Raimers (2006) observed that the teachers' union plays a very large role in hiring, retaining and promoting teachers. This influence apparently is backed by current educational policy giving the union the right to make decisions beyond the traditional functions of a union (Hevia et al., 2010). In the Federal Act on State Employees, it is regulated that the union is entitled to decide who is appointed in 50% of new teaching posts. This, and the mandatory affiliation to the union, has enabled control over the staff of schools and it is also reported the element of patronage in which sometimes has occurred the selling, buying and inheriting of posts (Guevara and Gonzalez, 2004; Barrera, 2009). Some participants (n= 4) made reference to the previous past practices to appoint school heads, and how now participants trust that appointments are carried out following the procedures established by *the Escalafón*.

"It is not how it used to be because in the past if you had a relative or friend in a high rank in the educational system you could get a leadership post in a school" (ADM3)

It seems that all the administrators (n= 4) strongly believe that one of the strengths of this system is the certainty that all teachers have the possibility of getting access to a leadership post in a fair and legal process.

"We are trying to make everything transparent, fair, and legal. We are trying to be as ethical as it could be possible because we do not have any preference for any of the persons who compete for a leadership post" (ADM2)

Leadership posts and higher positions within the educational system had become prizes and incentives for those being loyal to the union and those who were politically involved. In this scenario, in which leadership posts were incentives, was beneficial for the union and the government since the union had more control over its members and the government had a large and organised political backing to remain in power. In this regard, Arnaut (1998) confirmed that the union has always aimed at a large representation in the

positions of leadership in schools as a mean of political control of staff. For instance, in the State of Chihuahua, Muñoz (2005) interviewed the first governor of opposition who explained that prior to 1992 there had not been a notification of competition for a promotion to a headship in schools in 14 years. It means that perhaps previous to 1992 headships were assigned as previously described by the union and government.

It seems procedures to guarantee that the process is equal and fair for all participants have been implemented to ensure the trust of participants. This starts with the checking and reviewing every participant's file and documents. Every file and document is reviewed and checked separately by three persons, and if the participants do not agree with the points awarded by the commission there is a fourth reviewer. This is illustrated with the following description:

"I am not the only reviewer we are three. Each participant's file is assessed for at least three persons" (ADM1)

It seems that the situation has been gradually changing and currently positions are assigned following the procedures established in the joint commission. Even the commission was upgraded in the early 70's, it started properly functioning in the 90's; therefore, still now officials of the commission are trying to consolidate the trust that competitions are carried out following the established procedures.

Equal opportunities for pursuing a leadership post. Another strength some participants (n= 14) perceived by this system to appoint school leaders is that it offers equal opportunities for all teachers to pursue a headship post. This aspect is closely related to the previous one -the increased trust- as all teachers in compulsory public education have the right to pursue a headship via *the Escalafón*. However as mentioned before, this right was not completely respected in the past. Currently, it seems that available leadership posts within schools and the system are accessed based on the promotion system in which anyone interested could participate.

"This is a competition because posts are not assigned anymore by other mechanisms. In *the Escalafón* all have the opportunity to participate under the same conditions" (ADM2)

This is confirmed by a school head who believes based on her experience that this system offers the same opportunities for anyone who decides to pursue headship:

"I believe the ladder-merit system is very positive because all teachers have the same opportunities" (HT11)

This perception should be understood in the context that preceded the previous non-transparent practices in which regulations and procedures used not to be followed. Most teachers know that there is a promotion system, and that they are entitled to participate if they want to do it.

However, it seems that the promotion system has not been completely established state-wide as one participant transferred from another city of the state described that in the district in which she was assigned as the supervisor's assistant none of the 29 school heads were appointed by *the Escalafón*. This still confirms the negative stigma pointed out by recent literature in relation to how school leaders are appointed in some parts of Mexico. In this regard, Hevia et al. (2010) point out that the appointment of heads in Mexico is still based on the relationship that those seeking a leadership post have with the union.

The perceptions that this system offers equal opportunities for all teachers to seek headship comes from the experiences that many of the participants in this study had. It is also important to acknowledge that things seemingly have been gradually changing. It seems that the commission adheres to follow the established procedures making true the right that all teachers holding a tenure teaching post have to pursue a leadership post.

Academic preparation. This study also found that the current system to appoint school leaders promotes academic preparation of candidates seeking headship. Some of the respondents (n= 8) viewed this as a strength. In the assessment of candidates' application for a headship up to 45% of the final score could come from the factor professional preparation, which is divided into two sub factors: academic preparation and continuous training. Seemingly when teachers pursue a headship post a recurrent practice is to strengthen as much as possible their qualifications. Typical responses were similar to the following:

"In *the Escalafón* win those with more qualifications; I think this is positive. It enables that new heads come to the post prepared" (HT6)

It seems that the value given to preparation under this system concurs with Matters (2005) that aspiring school leaders should receive preparation and development in order to generate peak performance in their roles. Likewise, Thomas and Bainbridge (2002) point out that effective educational leadership emanates from school leaders demonstration of knowledge. It was described that some aspiring heads hold two undergraduate degrees plus two masters since a strong educational background increases the possibility of promotion. However, an important aspect to consider under the preparation that this system favours is the connection that theoretical knowledge acquired in their preparation has with their practice as school leaders because there is limited available preparation in school leadership and management. The academic preparation that the system promotes should also be seen with a critical perspective. Aspiring heads pursuing one graduate degree after another may be doing so probably just with the intention to accumulate more points and get promoted.

Continuous training. Almost half of the respondents (n= 10) raised the theme 'continuous training' as another strength of the career ladder system. They asserted that this system enables the appointment of trained school leaders mainly in teaching and learning. It is considered that this aspect favours teachers pursuing a headship post enrol in workshops and courses which give them points for promotion, and also gives them new knowledge and skills.

"I think it enables continuous training; it makes those who are pursuing a headship post to enrol in courses to be pedagogically updated" (TSH2)

However, in the case of some participants (n= 4) the attendance to short courses and workshops seems to have been done with the aim just to gather as many points as possible in order to be promoted. A school head mentioned:

"I put emphasis in the points I needed to get promoted. I enrolled in any course that I could" (HT3)

Under this system continuing professional development receive the value of 25%; however, the courses and workshops available in educational leadership and management seem to be limited. This is confirmed by Cordero et al. (2008) who point out that aspiring heads in Mexico have accumulated throughout their career list of courses and workshops little related with their role as school leaders. It makes us acknowledge that even if professional development was considered positive, it is still a limited strength since there are not available courses for aspiring heads. Bush (2008) points out that headship is a specialist occupation that requires clearly defined preparation; then, there could be offered courses in leadership that prepare aspiring heads during their path to headship being academic preparation and continuing development highly valued under the current system. Also seemingly the attendance to short courses and workshops appear is done in some cases with the aim to gather as many points as possible in order to be promoted. Courses will probably have a limited impact in their professional performance if teachers attend courses with the idea of just getting the points. This situation raises the debate that probably there is a need to reorient the focus of the assessment of continuous development in order to make it more meaningful and related to educational leadership.

Partially holistic assessment. Another strength mentioned by some participants (n= 7) is that the system implemented assesses the performance of candidates in several factors. Participants considered that the appointment of school leaders based on the performance in several areas could positively influence their efficiency as school heads. A participant commented in this regard the following:

"I think is positive the evaluation of many aspects such as years of teaching, qualifications, and courses could favour the appointment of good candidates" (HT1)

The *Escalafón* evaluates the following factors: professional preparation (45%), aptitude (25%) from which 20% represents initiative, assessed in the teaching performance report, and 5% other activities, which the system do not make clear specifically the aspects to assess, years of service (20%), discipline and punctuality (10%) also assessed in the performance report. An important aspect to consider is how valid the current system is to select the best

candidate for headship from a group of applicants since the most important characteristic for any successful evaluation system is the validity to measure what it purports measure. And also, how the current evaluation criteria, could predict, if not guarantee, a good professional performance of school heads once they are nominated to the post based solely on a numeric score. An improvement in the evaluation process could be to focus on the evaluation of leadership potential of applicants. It could be used a 360-degree feedback model to assess their leadership potential in which the current factors considered for promotion maybe complemented with other aspects. It was perceived positively by the participants in the study the assessment of several aspects for promotion. However, an improvement in the mechanism of assessment in which the participants were assessed in more factors related to the post of headship could favour the appointment of better potential leaders.

2. The System's Shortcomings

The system is ruled by an obsolete set of regulations. The need to upgrade the current regulations dictating the process to appoint school leaders regarded as important for (n= 17) participants. The system operates with a set of rules that were promulgated in 1973 being seen as a shortcoming by participants. They regarded as obsolete and out-dated some of the rules and urged for an improvement in the procedures for promotion.

"We have rules that were promulgated 40 years ago which are out of context and favours seniority. Skills and preparation for the post are not taken into account" (ADM4)

It seems that there are several parts of the current regulations that according to the participants need to be amended. For instance, it was mentioned by some participants (n=6) that there are some rules could be understood in multiple ways:

"Some rules could be understood in two ways" (TSH3)

"There are some rules that generate problems of interpretation" (ADM4)

The majority of the perceptions mentioned belong to Part 5, factors of promotion. In this part are described the values in percentages and the limit in points of the factors considered for promotion: preparation (45%) with a limit of 1080 points, aptitude (25%) with 600 points, years of service (20%) with 480, and discipline and punctuality (10%) and 240 points. Participants also considered problematic to establish a limit in the factor preparation that includes professional qualifications and professional development. This situation could discourage participants pursuing leadership posts to be continuously engaged in professional development because once they have reached the limit in points other courses taken are not considered. The upgrading of the current regulations could focus on the promotion to leadership posts to those teachers who show readiness for leadership. Readiness could refer to the degree to which aspiring heads have the necessary knowledge and skills to assume a leadership responsibility. This implies that the educational system provides opportunities for aspiring heads in preparation and development, and also in the implementation of new mechanisms and standards to assess leadership potential of aspiring heads. Regulations and mechanisms to appoint school heads could be aligned to new approaches and practices that have proved to be effective at international level. However, local authorities are unable to do the upgrading of the rules guiding promotion since the promotion system is established at national level and the regulations, procedures, and organisational structures are the same in the 32 states of the country.

The system promotes credentialism. Another weakness perceived by (n= 8) participants is the credentialism the system based on points promotes. This seemingly causes that aspiring heads pursue courses, diplomas and graduate programmes sometimes just with the intention to accumulate points in order to get promoted. In this regard, it was mentioned by some participants (n= 6) that there are cases of teachers who have completed two bachelor's degrees plus two masters.

"It is just credentialism being just accumulating documents, certificates, and diplomas, but I think most of the persons who get promoted do not have the specific preparation for the post" (HT2)

It seems that there is a high reliance on credentials in determining promotion. Under this system, a positive aspect could be that applicants are engaged in a continuous professional preparation process. The negative side is that participants could enrol in academic programmes just to get a degree and consequently the points awarded not taking advantage in their development as educators and potential school leaders. Each workshop, course, or academic degree has a value in points. It was mentioned by the administrators that sometimes headships have been won by one point difference so that participants try to accumulate as many points as possible relying constantly on academic preparation and professional development to gain points.

The emphasis given to academic preparation has generated the proliferation of low quality graduate degrees. Two participants expressed their opinions in this regard pointing out that some masters and doctorates do not have the required quality as graduate degrees. Nonetheless, *the Escalafón* has to accept them because they are officially recognised by the ministry of education. Seemingly there is not a strict control over these programmes being usually faster and easier to obtain. An administrator shared her opinion on this topic:

"There are teachers who pursue low quality master's degrees since they are easier to obtain as long as they are officially recognised they are valid here in *the Escalafón*" (ADM2)

A teacher pursuing headship shared how other teachers have made comments about his second master's degree in which he is currently enrolled:

"A lot of co-workers tell me I am studying just to get points. They say that my master is *patito* (Mexican slang literally translated as 'little duck' which means very low quality), but I do not care as long as it is valid" (TSH2)

Lack of previous preparation for the post. Even with the strong emphasis on academic preparation and continuous training participants perceived that newly appointed heads do not have specific preparation for the post. Participants (n= 14) stressed the importance of being prepared in school

leadership and receive previous preparation to develop specific skills needed for the post:

"I think it is needed specific preparation for the post before teachers are promoted to headship. The job as school head is more demanding than the job as a classroom teacher" (HT7)

"I perceive a weakness that we arrived to the post without preparation in leadership and school management" (HT9)

Participants described they entered into a new role in which they had little experience and knowledge. Daresh and Male (2000) comparative study of first year school heads in Britain and the United States pointed out the culture of shock of moving into headship for the first time facing new tasks and challenges. In this part participants addressed the need to prepare aspiring heads to favour better performance once appointed to headship. The NCSLCS (2009) in England reports that the strengthening of school leadership is a key policy priority for governments worldwide. Training and development of school leaders has been strengthened in many countries either as preparation for entry to the post or to further develop the skills of active heads since the mid-1990s (Huber, 2008). Moorosi and Bush (2011) based on a study exploring leadership preparation and development in Commonwealth countries pointed out that give preparation no attention means there is a chance that schools are placed in the hands of unqualified personnel. In Mexico the lack of requirement of leadership preparation probably comes from the assumption that good classroom teachers could be good school heads. However, Mexico needs to learn from international experiences in educational leadership development and reorient the importance preparation for leadership posts before promotion.

Headship is not attractive at early stages of teaching. A small number of respondents (n=6) perceived that perhaps there is a lack of interest to pursue a headship by some teachers in an early stage of their career for the lack of economic incentives. Participants commented that the increase in their salary once appointed as school heads is not significant. There is in Mexico a programme of economic incentives called *Carrera Magisterial* composed of different levels that has more impact on teachers' salary than a leadership post,

and in which it is easier to advance as a classroom teacher than it is in a leadership position. According to participants in the study, some classroom teachers prefer progress in the incentive's programme and then seek headship:

"In a competition for a leadership position participate people who want to be school leaders, the increase in salary is not big for the new responsibilities and stress. Yes, there is an increase, but is not as big as it is in *Carrera Magisterial*" (HT10)

In their study, Draper and McMichael (1998) reported bureaucracy, paperwork, stress, a degree of isolation in the role, and impact on the quality of life as disincentives to apply for headship. However, in the present study participants addressed the lack of economic incentives as a factor that hinders pursuing a leadership post. According to participants classroom teachers prefer to reach a high level in *Carrera Magisterial* before seeking headship. The programme is composed by four levels in which it is mandatory that teachers stay a number of years before being promoted for the following level (A= 3 years, B= 3, C= 4, and D= 4), so ideally it will take 14 years for a teacher to complete all levels and then think about promotion. This translates with a waiting for at least 6 or 10 years if teachers complete two or three levels before advance to a leadership post which seemingly is common hindering early talent identification. This limitation hinders the possibility to establish mechanisms to identify teachers in their first years of teaching that could be developed and promoted as heads early in their careers. This contrasts with the approach followed for countries that have given priority to leadership strengthening even implementing talent identification programmes in which teachers that show potential for leadership are identified, prepared and appointed to headship in the first years of their careers e.g. England and Singapore. Mechanisms should be found to give the same opportunities for classroom teachers to advance in *Carrera Magisterial* for incumbent heads. This would enable that those teachers who want to pursue a leadership post do not wait several years until they have made a significant progress in the incentives' programme.

The system needs more transparency. Some participants (n= 8) considered that the system still needs more transparency. Participants

commented that they have witnessed other aspirants disagreeing with the score they get. The following is an extract of a view on this issue:

"I have total trust in the commission on promotion, but it will not be an inconvenient if competitions were more transparent. It is needed to implement other mechanisms to assure that participants know how they and other participants were evaluated. I have sometimes seen very unsatisfied participants with the results" (TSH2)

These findings seem to be contradictory in the sense that one of the strengths is attributed to the increased trust in the system. However, this theme closely related to trust, also emerged as one of the shortcomings of the programme. As much as it could seem a contradiction, this situation is understandable because the commission on promotion still carries the negative stigma inherited by non-transparent practices of the past. Similar findings reported by Slater et al. (2006) in a comparative study carried out in the state of Texas in the USA and Sonora in Mexico in which they compared the processes to appoint school leaders in both states. In relation to *the Escalafón*, it is reported that there is little trust in *the Escalafón* because no one really knows if the people appointed really have the greatest number of points. They further assert that the applicants for headship do not trust the system and suspect favouritism. Trust and transparency could be achieved if the commission on promotion establishes mechanisms that enable applicants to know how their files and those of other participants are evaluated. It seems that to consolidate the trust that has been gradually gained, more transparent mechanisms are needed in order to guarantee competitions are perceived as fair and impartial.

Ethical performance is not assessed. The study also found that respondents (n=6) believe that a shortcoming of the current system is the lack of ethical performance evaluation of participants in competitions. According to the participants, *the Escalafón* does not consider factors that assess the proper ethical and professional behaviour of candidates since in competitions any teacher can participate. Seemingly sometimes are appointed by this system school heads that have had problems in their performance as teachers. According to two administrators as long as candidates are teachers holding a tenure post they have the right to compete for headship without taking into

consideration if they had or are having problems in their post as teachers. An administrator shared his view on this issue:

"Just imagine that come to headship a person who was about to be fired four or five times, what kind of school leader he or she is going to be"
(ADM2)

Participants in the study seem to acknowledge the importance to evaluate more comprehensively the professional ethical performance of teachers pursuing a leadership post. Teachers and school heads are seen as role models for children and young people because their position of influence. Seemingly it is well regarded for some participants the ethical aspect of leadership especially that which could encompass the leader's honesty, integrity and trustworthiness. It was described that the current regulations enable the participation in competitions of any teacher regardless they have had problems in their role as teaching professionals. The evaluation of ethical performance could be considered superficial in *the Escalafón* given that the factors discipline and punctuality account together for 10% of the final score and a maximum of 240 points. However, the assessment seems general because the factor discipline is assessed following an estimative scale which grants 48 points if teachers observe proper and professional behaviour a few times, 72 if it is shown with some frequency, 96 very often, and almost always 120. That is why *the Escalafón* could potentially benefit from a more comprehensive mechanism to assess participants in competitions in their ethical aspect as educators and potential school leaders.

The assessment of teaching performance seems not to be real. Teaching performance is another factor taken into account for promotion assessed at the end of the school year. It is carried out in every school by the school head that assesses the teaching staff, and teachers get an evaluation report that give a maximum of 720 points. It was commented by some participants (n= 9) that the evaluation of teaching performance is not carried out properly. It was mentioned that a common practice is to give all teachers the 720 points to avoid unfairness given that some schools assess teachers with rigour and following the procedures, while other schools just give the 720 to all teachers. This has generalised the practice to give all teachers in most schools 720

points, being the accurate assessment of teaching practice in many cases unreal.

"The evaluation of teaching performance is not real. Almost all of them get the maximum of 720 points because in a school the assessment could be done correctly, but in another could not, since we do not know, a common practice is to give the highest amount of 720 points to all teachers" (HT2)

For the evaluation of teaching performance, the instrument of assessment considers three general elements: aptitude, discipline, and punctuality. A problem with this assessment is the seemingly lack of collection of comprehensive evidence, the confusion it could cause, and its subjectivity. In the case of the factor aptitude that evaluates teaching practice, the regulations do not mention how often, and from an operational perspective, how the assessment of teaching practice should be carried out. It was reported that teaching is usually evaluated in a subjective way without real observation of practice and without specific guidelines and parameters leaving it to the criteria of school heads. In reality the evaluation of teaching seems to be problematic because good teaching means different things to different people. If teacher assessment is overly subjective, then is likely that dissonance in standards will occur between individual schools.

Limited available preparation in leadership. Participants (n= 10) expressed that there is just a master's programme in educational management available at a local university that could strengthen the preparation of teachers seeking headship. Participants suggested that candidates pursuing a headship who want to strengthen their knowledge and understanding in the areas of leadership and educational administration could do it by enrolling in the available master's programme. Two participants who had completed the programme regarded it as good in their preparation. However, this programme is offered just in the second largest city of the state restricting the possibility that other teachers pursuing a leadership posts from other cities of the state benefit from it.

It seems that in Mexico could be appointing better prepared school leaders given that there are academic programmes focused on the preparation and training of heads. Therefore, there could be a reorientation in the regulations of *the Escalafón* to make the training and preparation in school leadership

mandatory, and also offering meaningful opportunities for this preparation. It seems that in preparation of school leaders Mexico is being left behind by countries that offer preparation at all stages of a school head career e.g. pre-service, induction, and in-service. Pont et al. (2008) reported that some countries have all types of training running in parallel e.g. England, Finland, Northern Ireland, Israel and Slovenia, while others provide at least one or two.

Conclusions

This exploratory study has provided a critique of the current system to appoint school leaders in Mexico. It was a first approximation to the system of promotion trying to understand its positive aspects as well as its shortcomings. This study even being small constitutes the largest empirical work carried out to explore the system of promotion. According to the findings there is a need to conduct a deep review of the current system to appoint school leaders. The regulations governing the system and the procedures of promotion were promulgated almost 40 years ago. A common facet in highly achieving countries in student outcomes is the importance given to leadership strengthening. It seems that under the current conditions the appointment of fully developed school heads before promotion has been neglected along with a lack of meaningful preparation once they are in the post. The study emphasises a need to upgrade the current educational policy pertaining to educational leadership development in Mexico.

Another implication from the findings of this study is the need to consolidate the process of transparency in the appointment of school leaders. The appointment of school leaders has historically struggled with the lack of certainty that school leaders were appointed following the established procedures. These practices seem to be more concurrent in the past previous decades. As result, the system of promotion inherited a negative stigma that has been gradually disappearing. However, transparency emerged in the present study both in the strengths and shortcomings of the system. In the first case it was acknowledged that there has been improvement in these aspects since most of the participants in this study considered that competitions for leadership posts are transparent. Nevertheless, in the shortcomings, it emerged that this improvement has been gradual and that there are still things to do to consolidate the transparency to make sure that school leaders are appointed in transparent and fair competitions.

The study suggests a need to upgrade the current system of appointment of school leaders to include leadership preparation as a way to strengthen the appointment of better prepared school heads. This lack of attention given to leadership preparation in Mexico seems to align with recent studies such as Moorosi and Bush (2011) "[the] less focus on [leadership] preparation means that there is a chance that schools are placed on the hands of unqualified personnel" (p. 71). This approach adopted by some countries to appoint leaders without previous preparation as Mexico seems to be problematic. The reason perhaps is a waste of time in the readiness to enact headship effectively.

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