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Through the New System of Promotion

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Leadership Profiles of New Appointed Mexican School Leaders to Indigenous Schools Through the New System of Promotion

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Abstract	Article Info
The purpose of this research was to explore the leadership identity development and preparedness for the role of new appointed school heads to Mexican primary schools that serve indigenous students. The research was framed as a qualitative study and used semi-structured interviews as the method for data collection with twelve appointed school heads by the new system of promotion implemented in 2015. The study was carried out to the highest ethical standards in educational research with anonymity, confidentiality, consent, and respect for the participants observed at all times. This research found that new appointed Mexican school heads in primary schools are assigned to the post with different levels of leadership development. Based on the previous experiences new appointed school heads bring to the job, three different profiles were identified: An Extended classroom teacher profile, a managerial profile, and in few cases a leadership for learning profile.	

Introduction

Implementing processes of choosing effective school leaders is one of the most significant decisions educational systems need to make. Headteachers are responsible for setting school improvement agendas and teacher workplace conditions to enable all children have access to the highest-quality education. This usually means schools performing in accordance to national educational policies and community expectations. The implementation of processes to appoint school leaders committed to the success of their students has been a priority of educational systems. This is also the case of Mexico that implemented in 2015 a new system to appoint school leaders. Currently, school leaders face a demand of higher levels of student achievement on standardised tests as proof of quality, along with the daily challenges of the multiple functions they need to perform. However, most significat research in school leadership has been conducted 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 school leaders as the case in Latin America.

This research explored the development of leadership identity in new appointed school leaders to indigenous schools in Mexico. Exploring their leadership identity development facilitated to analyse how the new system favours or limits preparation and readiness for leadership posts. Indigenous schools in the Mexican educational system are the most limited and with the lowest educational outcomes. This is mainly due to their distant location in remote rural areas, and sometimes their lack of teaching staff for weeks and even months during the school year. Furthermore, there is also a lack of cultural pertinent education since students speak an indigenous language usually unknown by teachers and school leaders who come from different cultural background. Leithwood et al. (2004) found that in the case of troubled schools there are virtually no documented instances of these types of schools being turned around without

intervention by a powerful leader. They continue their claim specifying that many other factors may contribute to such turnarounds, but leadership is the catalyst. Indigenous Mexican schools instead of being labeled as troubled should be labeled as unattended with problems of inequality in comparison to urban schools and the lack of culturally pertinent education, which causes low academic achievement of its students.

Literature Review

Leadership and Management

The roles played by school leaders could be divided in two broad categories: those related to management and those to leadership. The literature reports that leadership is not the same as management. Cuban (1988) provides one distinction between these terms by leadership he refers influencing and motivating others actions in achieving desirable ends. In his vision, leaders frequently initiate change to reach existing and new goals. In the case of management he asserts that managing is maintaining efficiently and effectively current organizational arrangements. Jenkins (2009) points that school leaders should seek a balance between both the instructional leader and the manager-administrator roles in order to successfully operate and lead schools.

Pertaining their roles as managers, the literature indicates that implementing effective organizational processes have a positive influence on student achievement (Davis et al., 2005). This includes setting directions for the organization through shared goals, monitoring organizational performance, promoting effective communication, and redesigning the organization through the creation of a productive school culture, modifying organizational structures that undermine the educational work, and building collaborative processes (Leithwood et al., 2004). The manager role of a school leader is related to the implementation, monitoring, and controlling activities, which according to Newberry (2005) many times are designed outside the school at governmental or district

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levels. As managers, school leaders focus on attending those functions that are mainly internal and crucial for the day-to-day operation of the school. It is assumed that seldom there is an effective leader who has not been a good manager. Good management brings a degree of order and consistency (Kotter, 1990).

Leaders, on the other hand, set a direction, align people, motivate and inspire (Kotter, 2001). "Leadership reflect the assumption that it involves a process whereby intentional influence is exerted by one person over other people to guide, structure and facilitate activities and relationships in a group or organization" (Yukl, 2002, p.2). Effective leaders are open-minded, ready to learn, flexible and persistent, and their success depends on their ability to apply leadership practices appropriately in the context of their school (NCLSCS, 2009). The National College for School Leadership in England in 2004 provided three defining characteristics of leadership:

- A sense of direction or purpose; wanting to achieve, sustain or change something.
- Taking action without direct instruction to achieve this purpose.
- Persuading, influencing, encouraging (and sometimes, instructing) other people to act in pursuit of this purpose.

Leadership practice has been evolving and currently there has been a shift to more democratic and participative approaches as distributed leadership (Gronn, 2002; Spillane et al., 2004), shared leadership (Lambert, 2002), democratic leadership (Starratt, 2001; Moller, 2002), and team teacher leadership (Little, 1990). This has enabled an evolution in the conceptualization of leadership from the charismatic leader of the transformational approach to leadership in which leaders are portrayed as super talented individuals with exceptional gifts that transform schools as solo performers to alternative and shared approaches to face current demands in schools. This favours the participation and sharing of responsibilities from headteachers to middle leaders, teachers, students, non-teaching

staff and parents because new challenges far exceed the capacities of any individual leader.

Leadership Identity Development

The develpment of a leader identity is perceived to be vital to the advancement of becoming a leader (Ely et al., 2011), and the progress towards a leadership identity is linked to the development of one's self-concept as a leader (Ibarra et al., 2010). Van Knippenberg et al. (2004) pointed that the development of a leadership identity is an ongoing process that changes as the individual learns through lived experiences shaping and reshaping their identity. Bennis (2009) affirms that a genuine understanding of oneself as leader comes after continuous reflection on experiences. A leadership identity involves the incorporation of leadership knowledge and skills and a self-belief as leader as part of their self-concept (Richardson and Loubier, 2008). This knowing themself as person and leader is an important aspect of leadership development and leadership identity construction (Bennis, 2009).

Crow et al. (2016) points that there are two perspectives in regard to whether and to what degree identities are constructed by the individual who freely chooses a set of identities (Kantian) or the degree to which these are culturally and historically determined (Hegelian). Many support the latter idea that leadership identity development is more socially constructed. In this sense, empiric research suggests that leadership development programmes are identity workspaces that help to develop effective leaders (Petriglieri, 2011). There have been reported conceptualizations of leadership change overtime as participants are exposed to leadership development opportunities (Komives et al., 2006). In the case of education, preparation programmes for aspiring school leaders is an initiation into identity construction and subsequent performance (Lumby and English, 2009). Leadership development is best understood as a process through which leadership identity is co-constructed through mentoring, networking and shared learning

(Moorosi, 2014). This leads to a more relational aspect of leadership identity construction (Ely et al. 2011). A key aspect in the consolidation of a leadership identity is a positive, benefitial and armonic relationship between leaders and followers (DeRue and Ashford, 2010).

In the case of leadership identity development of a school leader this could be perceived when there is a professional growth by the mindset shift of classroom teacher to that of an educational leader (Browne-Ferrigno, 2003). In the twenty-first century a term that encompasses an effective leadership identity to lead schools has been concenptualised as leadership for learning replacing the previous emphasis as managing the curriculum or instructional leadership (Bush, 2010). Murphy et al. (2007) mention that leadership for learning is the ability of leaders "(a) to stay consistently focused on the right things, the core technology of schooling, or learning, teaching, curriculum and assessment and (b) to make all the other dimensions of schooling (e.g. administration, organization, finance) work in the service of […] improved student learning" (p. 179). MacBeath and Dempster (2009) suggest that there are five important principles that underpin leadership for learning, including: shared or distributed leadership; a focus on learning; creation of the conditions favourable for learning; creating of a dialogue about leadership and learning; and the establishment of a shared sense of accountability. Knapp et al. (2003) suggest that three types of learning take place in educational institutions: student learning (the core purpose of schools); professional learning, growth in knowledge and skill on the part of teachers and other key school personnel; system learning, or the way that schools adapt and respond to current policy learning agenda.

The New System to Appoint School Leaders in Mexico

In 2015 a new process to appoint school leaders in Mexico was implemented replacing the previous system that lasted 43 years. In the previous, a point-based system, positions were assigned in a

competition to teachers who accumulated more points in four assessed factors: knowledge, aptitude, years in service, discipline and punctuality. Seniority was usually a determinant factor to obtain a leadership post. There was also an unofficial procedure in which leadership positions were given as prizes and incentives for those teachers loyal and involved in the Teachers Union political activities. Leadership positions were permanent once obtained either by the point-based system or the Union. In the new system launched in 2015 leadership appointments are assigned based on the results of two tests: the *test of knowledge and skills for professional practice*, and the *test of intellectual aptitudes, ethical and professional responsibilities.* A list is created according the scores participants obtained to assign available positions. During their first two years of incumbency as school leaders they will go through an induction process. Induction includes the assignation of a tutor to assist new school heads with mentoring activities and also taking online courses focused on educational leadership. Confirmation and permanent status in their post will be obtained at the end of the two-year period if they get a positive evaluation otherwise they will go back to their previous teaching post. An important aspect to mention is that the tutoring and professional development processes had not been yet established after a year and a half of being implemented this system and this study was conducted.

Methodology

Participants

The study was conducted in the Tarahumara region of the state of Chihuahua, Mexico with primary school heads. The reasons to choose participants from this region were, because, it is a place in which little educational research is conducted, and with the lowest results in students' outcomes. The literature reports that the level of leadership identity development is linked to the effectiveness of school leadership. For this reason, the study researched this aspect for new appointed heads serving the most disadvantaged schools of

Chihuahua. This study was designed to know the professional profiles and experiences of new appointed school heads in a first phase, and with this information, later in a second phase will be proposed pertinent interventions to strengthen leadership preparation and development of new heads serving indigenous communities.

Twelve new appointed heads to indigenous schools with the new system of promotion were selected to participate in the study (See Table 1). To identify the participants, an appointment was held with the responsible for indigenous education in the ministry of education to explain the project, and he provided information about possible participants. At the beginning the plan was to have a sample of ten participants. However, two additional participants were invited because their schools were in between other schools first selected. Once respondents agreed to participate, semi-structured interviews were conducted with each of them in the schools they work.

Table 1

Biographical and professional information of participants interviewed

Participant	Gender	Years of Teaching	Degree Level	Previous Managerial Experience	Tutoring Teachers Experience
A	Male	12	Undergraduate	No	No
B	Male	9	Undergraduate	No	No
C	Female	10	Masters	Yes	No
D	Male	7	Undergraduate	No	No
E	Female	9	Undergraduate	Yes	No
F	Female	11	Masters	Yes	Yes
G	Male	8	Undergraduate	No	No
H	Male	12	Masters	Yes	Yes
I	Male	11	Undergraduate	No	No
J	Female	8	Masters	Yes	No
K	Male	11	Undergraduate	Yes	No
L	Male	9	Undergraduate	No	No

Regarding sampling, twelve participants is a small sample to generalize the findings to other indigenous populations in Mexico; however, many indigenous communities in the country have similar contextual conditions and educational policy and regulations are the same national wide. Harry et al. (2005) point that in the case of using an interpretative approach methodology a researcher achieves a more refined data analysis with a small sample size. Stake (2000) suggests that with small samples one can learn more deeply important things from almost any case. The following table presents the biographical and professional data of participants.

Data Collection Strategy

Interviews are deemed as one of the most effective methods one can use to collect information. Kvale (1996) points that an interview is a conversation, whose purpose is to gather descriptions of the life-world of the interviewee with respect to their interpretation of the described phenomena. For this study, twelve participants were interviewed. The participants were first contacted in person with a visit to the school they are assigned. Then, appointments were made to conduct the interview at a date and time convenient for the respondents. Six cases agreed to be interviewed the same day of the visit but at different time. At the beginning of each interview, the purpose was explained and permission was obtained to record the interview that lasted for 40 to 55 minutes. An interview guide was used to follow the sequence of questions. Then, verbatim transcriptions of the interviews were done by hand in Spanish.

Data Analysis Process

Transcription of the interviews favoured to create integrated sets to analyse. Thematic analysis was used to process the data originated from the interviews to determine the presence of certain concepts and meanings. Thematic analysis is a method for systematically identifying, analysing, organising, describing, and reporting themes

found within a data set (Braun and Clarke, 2012). A rigorous thematic analysis can produce trustworthy and insightful findings (Braun and Clarke, 2006). King (2004) pointed that thematic analysis is a useful method for examining the perspectives of different research participants, highlighting similarities and differences, and generating unanticipated insights. In the present study, each transcript was read in detail while using a marker to highlight main points, phrases, patterns and common terms. In the margins of the printed documents were coded the emergent themes.

Findings

Findings from this study suggest that there is a hierarchy of leadership profiles for new appointed school leaders to indigenous schools in Mexico. Three types of leadership profiles emerged from collected data. The profiles identified in this study seem to be prevalent and embedded according to their level of progression in their leadership learning. These are not identities that are enacted interchangeably, chosen consciously, or that emerge according to the situation in which school heads need to perform in a specific way. These profiles are more general and predominant in relation to the level of leadership development in their few months as incumbent heads.

Extended Classroom Teacher Profile

At first level there seems to be present an extended classroom teacher identity for those new appointed heads since they arrive to the post without specific preparation for their role as school leaders. In the present study this was the case of six heads who passed the two exams and were promoted immediately to headship. Their professional experience and expertise was at teaching level since after a week or two they passed the exams were assigned to headship. Participant G and L commented in this regard:

The day they gave the exam results they also asked us, according to the priority list, to choose the school we wanted to be assigned, and in a week and a half I was a school principal.

Everything happed so fast because I was teaching 5th grade in a Parral city and suddenly next week I was in charge of a school in this indigenous community.

These types of heads at the beginning of their incumbency arrive to the post with the knowledge, skills and preparation of a classroom teacher and without meaningful practical experiences in leadership. They reported conflicts and immediate challenges to manage a school, especially interpersonal conflicts with teachers and parents. This is illustrated buy the comments of Participants A and I:

At the beginning I honestly had difficulties with some of my teaching staff because I perceived they wanted to do things the way they wanted and not adhere to my proposals. I had to show an authoritarian leadership style to let them know I was in charge of the school.

In my second week in the post I had a problem with the parents committee because they wanted to use some money transferred by the state government to improve the facilities in the school's yard. However, I saw other priorities such as buying teaching material and improving the conditions of two classrooms.

Their few weeks in the post were described as exhausting since they usually spent all mornings and afternoons just to familiarize themselves with many aspects of being in a new role, usually many of these aspects were administrative related. This is illustrated with the quotes of Participant D and L, respectively:

I spent my first two weeks the whole day in the school reading and rereading the regulations, legal stuff, responsibilities of teaching staff and administrative personnel. This is vital knowledge for a school head that I did not know.

My first weeks in the post were hard because I needed to understand internally the school, and to understand broadly my new post particularly the federal and state programmes operating in the school. I consider that I am still in the assimilation process.

These experiences perhaps make a strong claim in the need for preparation before promotion for new heads. However, despite of finding their current role as headteachers challenging they expect to

improve their professional practice as time passes and could get tenure after the two year evaluation period.

Managerial profile

Another level of leadership development is the managerial profile. At this level, new school heads have the knowledge of teaching and learning plus managerial experiences. They are teachers who had opportunities to be in making decision positions such as temporary or teaching headships, positions in the Teachers Union, or invitations to serve in a committee in the ministry of education. They understand many of the managerial procedures and duties in schools and in different departments of the ministry of education. Participants E and J expressed their opinions in this matter:

So far I have not had any trouble or challenge during my first weeks as principal. Previously I was appointed to the regional offices of education in our municipality. I believe my previous experience helped me to know how to treat with people. Here is what you usually do. You interact with teachers, parents, students, and the supervisors of the school.

I pursued a headship because I used to be appointed to a committee in the Teachers Union. However, I did not receive any additional income, I received just my salary as teacher. I am really thankful I had that opportunity. The experiences are making easier this new position. I have heard other school heads colleagues of mine talking about the difficulties they had in their first year as principals.

In this study we found that in their few months as heads they focus mainly on having a smooth transition from their previous post adopting a managerial role as school heads. At this stage seemingly their main role is to keep the school just operating on a day-to-day basis without promoting any meaningful change or improvement at learning and teaching. The following are the responses of Participant C and K:

This is my philosophy: If things are going on smoothly you should not make any change.

I consider myself a good administrator. I do not have any doubt about it. I feel happy the way the school is working. I do not like to stress my teachers with projects and more projects as long as they teach I am happy with that.

In Mexico seems to be a natural progression from the identity of an extended classroom teacher at the beginning of their incumbency to that of a school manager as time passes. However, there are few cases of new heads appointed with the identity of a school manager developed already as it was the case of four participants in this study. They feel comfortable in their position but recognize that they still can improve their professional leadership practice. With these type of school heads, there is also potential to offer them preparation and professional development before promotion regarding coaching and mentoring of effective teaching since they have already developed the managerial aspect of the function.

Leadership for Learning Profile

And, a third level in the hierarchy of leadership development identified in this study was the leadership for learning profile. In this level of identity new heads arrive to the post with expertise and knowledge in both effective teaching and administrative duties. The difference between this headteacher and the previous is their emphasis on effective teaching. Participants identified leaders for learning spent few years as pedagogical advisers and or subject coordinators. They were invited to carry out these functions at an early stage on their teaching career because they were perceived as effective teachers and role models for their fellow teachers. The following are extracts of Participant F and H of their view on this aspect:

Two years after I started my teaching career I won the award of Teacher of the Year in my region. That brought other opportunities and I was invited as pedagogical adviser of the district.

I was invited by the district supervisor as pedagogical advisor in my fourth year of service to help him to train and support teachers. I have always been interested in my professional development and growth. Probably that was what

the supervisor saw I was one of the few pursuing a Master's degree. Now I am pursuing my PhD.

Their main function was to advise and tutor other teachers. In this level of identity, they as school leaders see themselves and act as pedagogical and instructional leaders. They complement this strength with some experience in managerial positions such as acting headships and/or union posts. The following are the perceptions shared by participants F and H, respectively:

Later, I was invited for two years to the regional offices of education as part of a committee to implement in schools a federal programme aimed at increasing the quality of instruction.

Then, I was invited to participate as the Teachers Union head in the municipality; I accepted just to give it a try, and it was a great experience. However, my passion has always been teaching, and I believe I was getting away from it. That is why I decided to come back again to school.

They have developed the knowledge and skills required to promote instruction improvement and high performance of students and teachers due to their expertise. It is important to acknowledge that very few cases are appointed to headship with this professional profile of having meaningful learning experiences in tutoring and couching effective teaching and managing people, situations and resources in their first months as school leaders. In the case of this study only two participants had these experiences and have reached the level of leader for learning identity. A plus is their professional preparation since both of the participants identified in this stage of development had completed a Master's degree. Perhaps this also strengthens their readiness for the post because they commented they feel comfortable with the position and their role as headteachers.

Discussion

In Mexico only few cases of new appointed heads arrive to the post with a leadership for learning profile developed. Many could be knowledgeable and skilled in effective teaching as in the case of the extended classroom profile identified in this study. However, the

progress towards a leadership for learning identity also implies knowledge and skills in effective management to continuously lead improvement. This combination favours to know how to influence, model and lead effective teaching across the curriculum and being a support for teaching staff, students and parents. Some participants in this study had meaningful managerial opportunities during their accession phase mainly in positions as acting heads or in the Teachers Union. However, the difference between the profile a of leader for learning and a school manager is that the former had more practical experiences in positions related to effective teaching such as pedagogical advisors or subject coordinators. New heads without these opportunities during their time as classroom teachers and pursuing a leadership post could reach their leadership for learning profile however at a slower pace.

There are also others who may never reach a leadership for learning profile and advance no further than a school manager profile. This is because the system of promotion does not require or offer opportunities for leadership development, and also the functions the ministry of education specifies for school leaders focus mainly on administrative aspects. This contributes in the wasting of time to properly develop schools leaders because many of them start learning and developing their leadership identity once they are in the role. In this study could be inferred that the new promotion system itself may raise their self-belief as leaders because they are certified as competent school leaders by the results they got in the two exams. They simply potentially may think they have the capacity for leadership but perhaps that identity is created by the system of promotion.

In many cases the progression between the identity of a school manager and the identity of leader for learning may take some time as incumbent in the post. A possible way to support a faster transition between a managerial to a leadership for learning identity could be through pertinent in-service development. Perhaps the tutoring process and the in-service courses proposed in this new

system could help to make a faster transition from classroom teacher to school leader. However, these processes had not been yet established after a year and a half of being implemented this system and this study was conducted. A faster transition could begin before promotion by offering meaningful leadership learning opportunities to strengthen both their theoretical and practical knowledge of leadership learning for teachers pursuing leadership posts. From the experiences shared by participants in this study it is suggested that the progression from one profile to the other is gradual. A risk with the approach to appoint school leaders lacking preparation for the post is that some probably never develop a leadership for learning identity and stay stuck in a manager's identity, the Mexican official view on leadership suggests that a good head is someone who just does right managerial duties.

It is needed that both leadership and management work in harmony with one another if school leaders are to create high achieving schools. Leadership is the process of influencing others, establishing direction, outlining people to move in that direction, motivating and inspiring them. Management, on the other hand, is helping people to focus on the right operational things in measuring progress towards achieving agreed goals and follow up on agreed actions. "One can be a leader without being a manager [and] conversely, one can manage without lead" (Schon, 1984, p. 36). Kapplan and Kaiser (2003) assert that "taking one leadership approach to the extreme while giving its complement short shrift leads to imbalance and ineffectiveness" (p. 20). They continue pointing that leaders may be too task oriented and not sufficiently people-oriented, too tough and not responsive enough to people's needs, too big-picture-oriented with not enough emphasis on planning and follow-through. Therefore, leadership effectiveness needs to be understood as the ability to draw freely from the two opposing sides as appropriate for a given situation.

Conclusions

It is important that Mexico upgraded it system of promotion to enable the appointment of better school leaders. However, there are other aspects that still need improvement; for instance, an essential aspect that could contribute in strengthening school leadership in Mexico would be upgrading the legal framework that regulates the functions school heads perform in schools. These functions were established almost forty years ago and eighteen out the twenty-two are focused on administrative operational related tasks that keep heateachers detached from what happens in the classrooms. The ministry of education should also give more autonomy to schools and their leaders since they do not have any role in hiring staff, allocating resources or managing budgets. School leaders usually play an intermediate function between the officials of the ministry of education and their teaching staff. And, another vital element that needs to be addressed is the preparation of school leaders. Their development as school leaders could begin before they are appointed to their post and not just when they are already in their role. This could be by offering and requiring preparation when they are pursuing a leadership post. This implies offering developmental opportunities that combine practical and theoretical aspects of leadership learning. As we found in this study, the profile of leadership for learning emerged in the cases of participants who had meaningful experiences as pedagogical advisors in combination with other managerial positions when they were pursuing headship. This means that it is possible to appoint better-prepared and developed school leaders. Preparation of school leaders is more needed for school leaders serving indigenous schools in which new appointed heads face cultural challenges and low student outcomes.

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