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RESEARCH ON IMPROVING SYSTEMS OF EDUCATION

Teacher professional norms in the Global South: Intersections between selves, situations, standards, and society

Yue-Yi Hwa
RISE Programme / University of Oxford
RISE Annual Conference, 23 June 2022

Oxford Policy Management
BLAVATNIK SCHOOL OF GOVERNMENT
UNIVERSITY OF OXFORD
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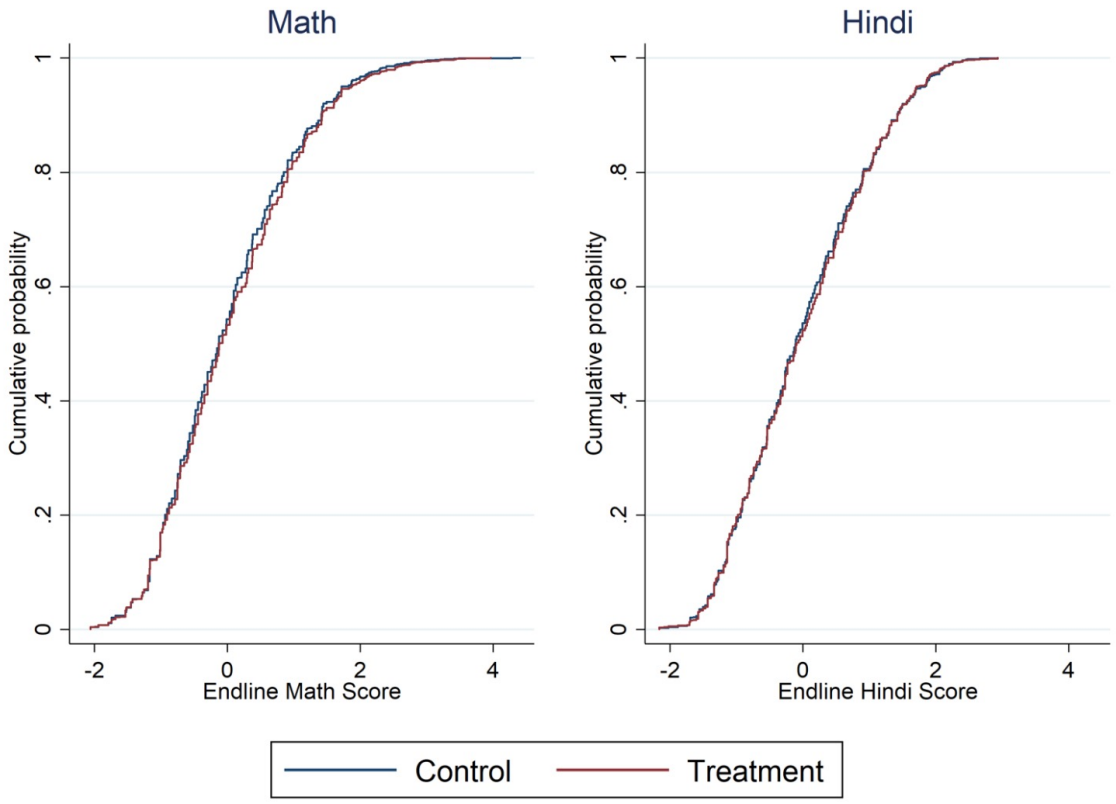
Motivation for this asynchronous symposium: teacher norms often override policy instruments (even if these norms are informal/tacit)

Figure 2: Distribution of student test scores at endline (Feb 2016)



Source: Muralidharan & Singh (2020).

In most cases, **teachers** knew about the program [and] could summarize its core objectives …

They do not, however, see it as leading up to action related to greater accountability or better pedagogy. Rather, they **primarily recall the program as a source of paperwork** (and logistics associated with uploading reports). …

Whereas the intervention was premised on **CRCs** playing a role of monitoring, accountability and coaching for schools, in practice they **are seen mainly as conduits for communication, especially of paperwork**, from schools to the bureaucracy.

—Muralidharan & Singh (2020), pp. 19–20

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Interlocutors in the paired interviews in this asynchronous symposium

- **Verónica Cabezas**, Pontificia Universidad Católica de Chile/ Elige Educar
- **Jessica Holloway**, Australian Catholic University
- **Joan DeJaeghere**, University of Minnesota
- **Shwetlena Sabarwal**, World Bank
- **Dan Honig**, University College London
- **Sharath Jeevan**, STiR Education/Intrinsic Labs
- **Margarita Gómez**, University of Oxford
- **Wendy Kopp**, Teach For All
- **Lucy Crehan**, author of *Cleverlands*
- **Katlego Sengadi**, Youth Impact
- **Belay Hagos Hailu**, Addis Ababa University
- **Shintia Revina**, SMERU Research Institute
- **Yamini Aiyar**, Centre for Policy Research
- **Soufia Anis Siddiqi**, LUMS
- **Masooda Bano**, Oxford University
- **Ying-yi Hong**, Chinese University of Hong Kong
- **Melanie Ehren**, Vrije Universiteit Amsterdam
- **Michael Woolcock**, Harvard University/World Bank
- **David K. Evans**, Center for Global Development
- **Maria Teresa Tatto**, Arizona State University
- **Kwame Akyeampong**, Open University
- **Luis Crouch**, RTI International
- **Juliet Wajega**, Hivos (formerly at Uganda National Teacher's Union)
- **Barbara Tournier**, IIEP-Unesco
- **Alice Cornish**, Better Purpose
- **Mike Hobbiss**, University College London/secondary school teacher
- **Laura Savage**, IEFG
- **Carlos Vargas Tamez**, UNESCO

Project approach

1. **Recruit interlocutors and refine interview pairings**

2. **Conduct interviews**

3. **Edit interview transcripts**
   - Transcribe using Otter.ai
   - Edit transcripts to read as conversational written text; add references and cross-references
   - Share with interlocutors for their revisions
   - Copyedit for consistency

4. **Commission discussant-style essays**
   - Identify, recruit, and contract authors
   - Share recordings and draft transcripts
   - Review initial drafts

5. **Conduct analysis**
   - First round of inductive coding
     // initial coding in grounded theory
   - Development of conceptual framework
   - Second round of coding in line with framework
     // theoretical coding
   - Reviewing the literature for empirical examples that can clarify, saturate, disconfirm
     // theoretical sampling

6. **Prepare publications**
   - Academic paper
   - Edited volume:
     - introductory synthesis chapter
     - interview transcripts
     - discussant essays (Barbara Bruns, Vu Dao & Khoa Vu, Sameer Sampat)

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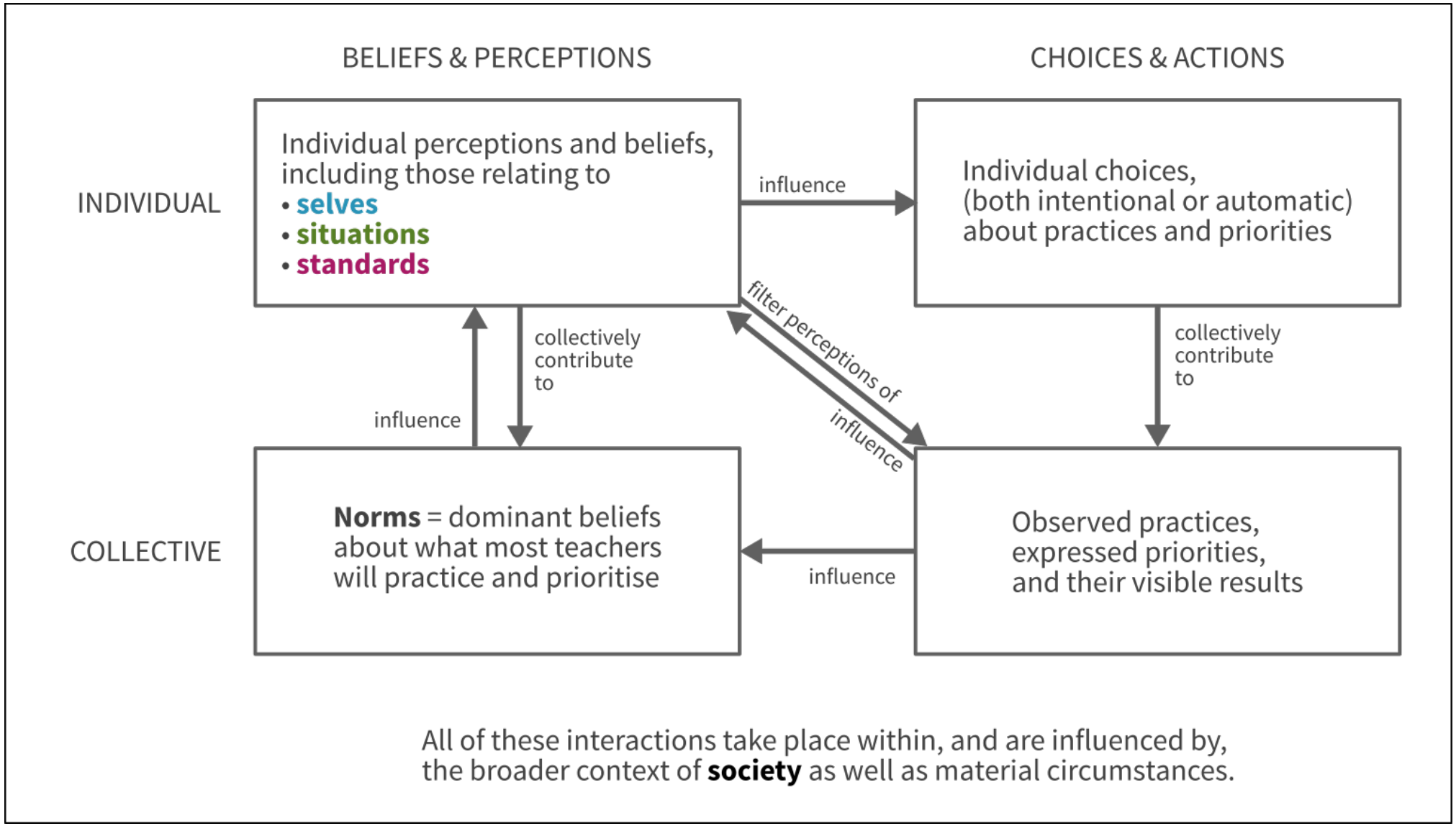
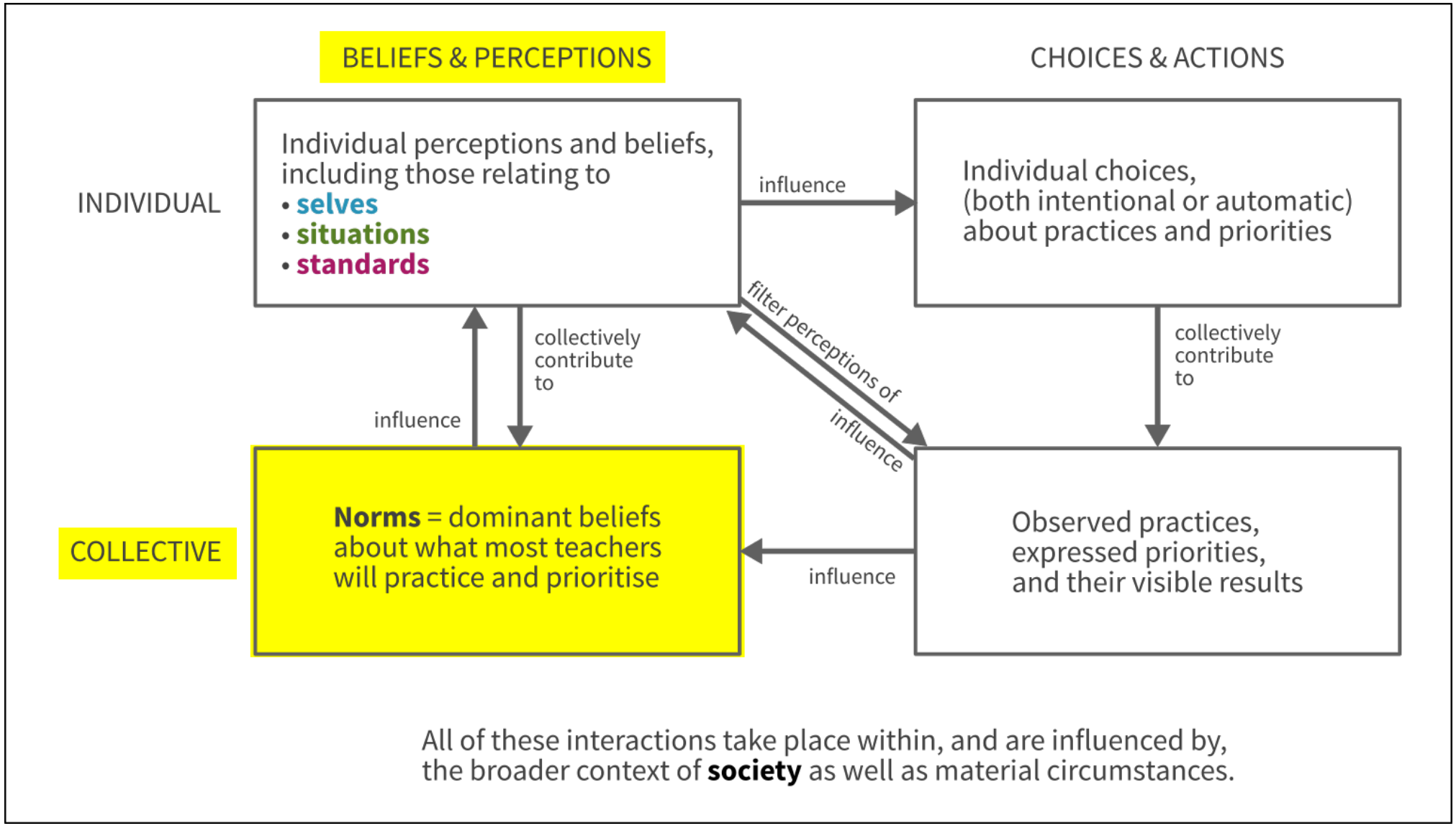
Defining teacher norms



(Bicchieri, 2017, on norms; Weick, 1995, on sensemaking; Buehl & Beck, 2015, on teacher beliefs & teacher practice; Maxwell, 2012, on symbolic/mental vs physical phenomena)

Defining teacher norms



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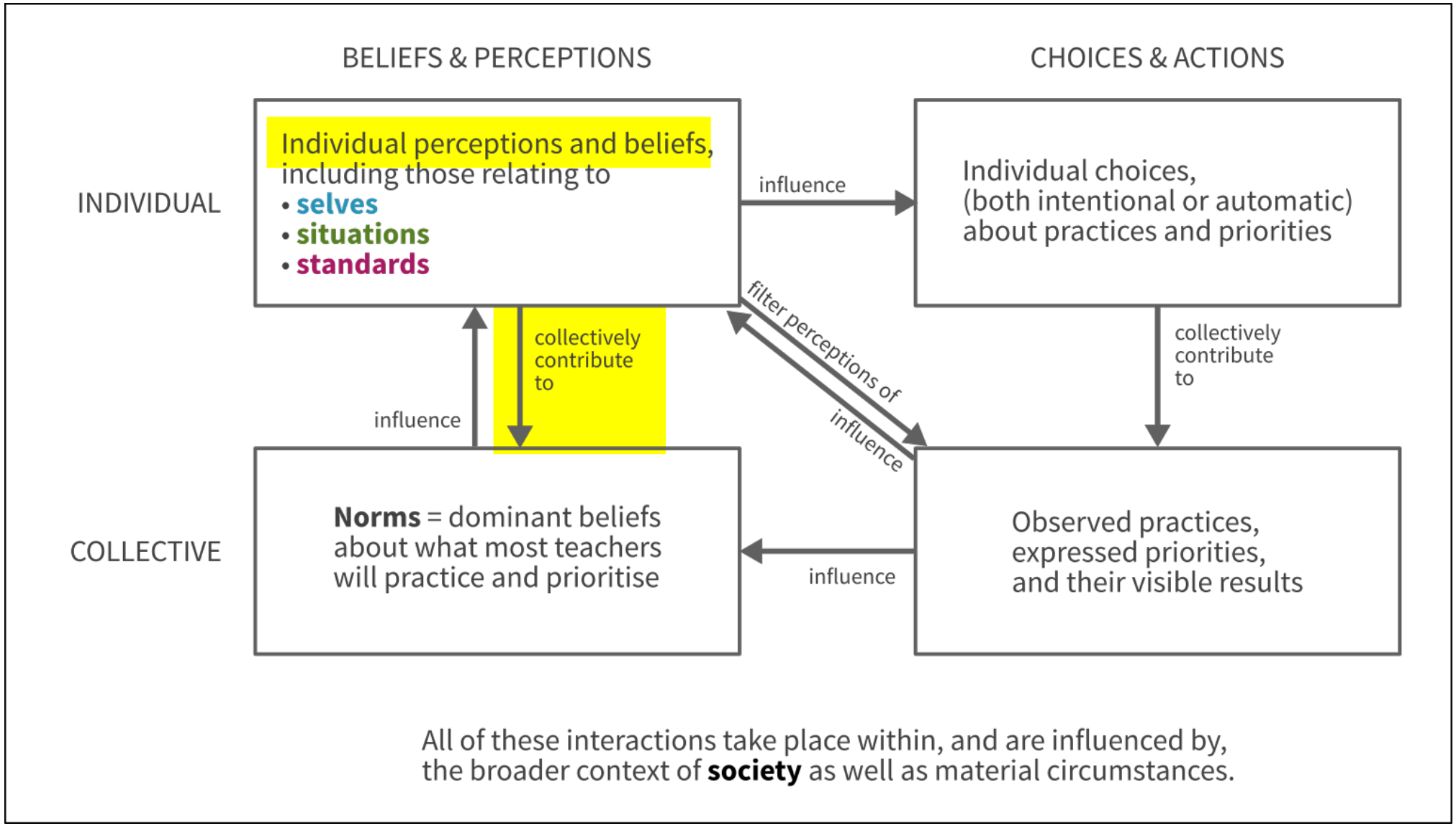

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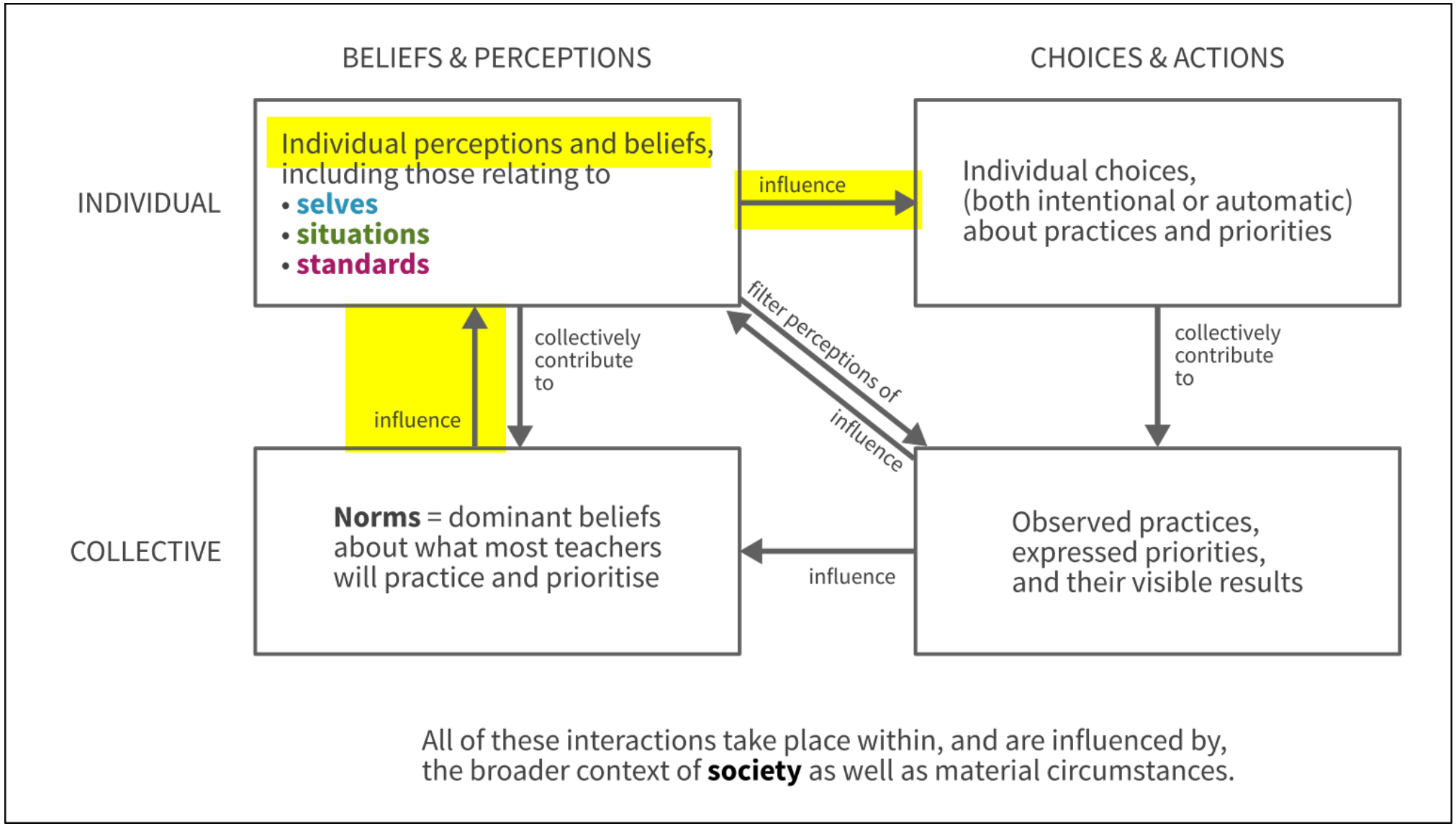

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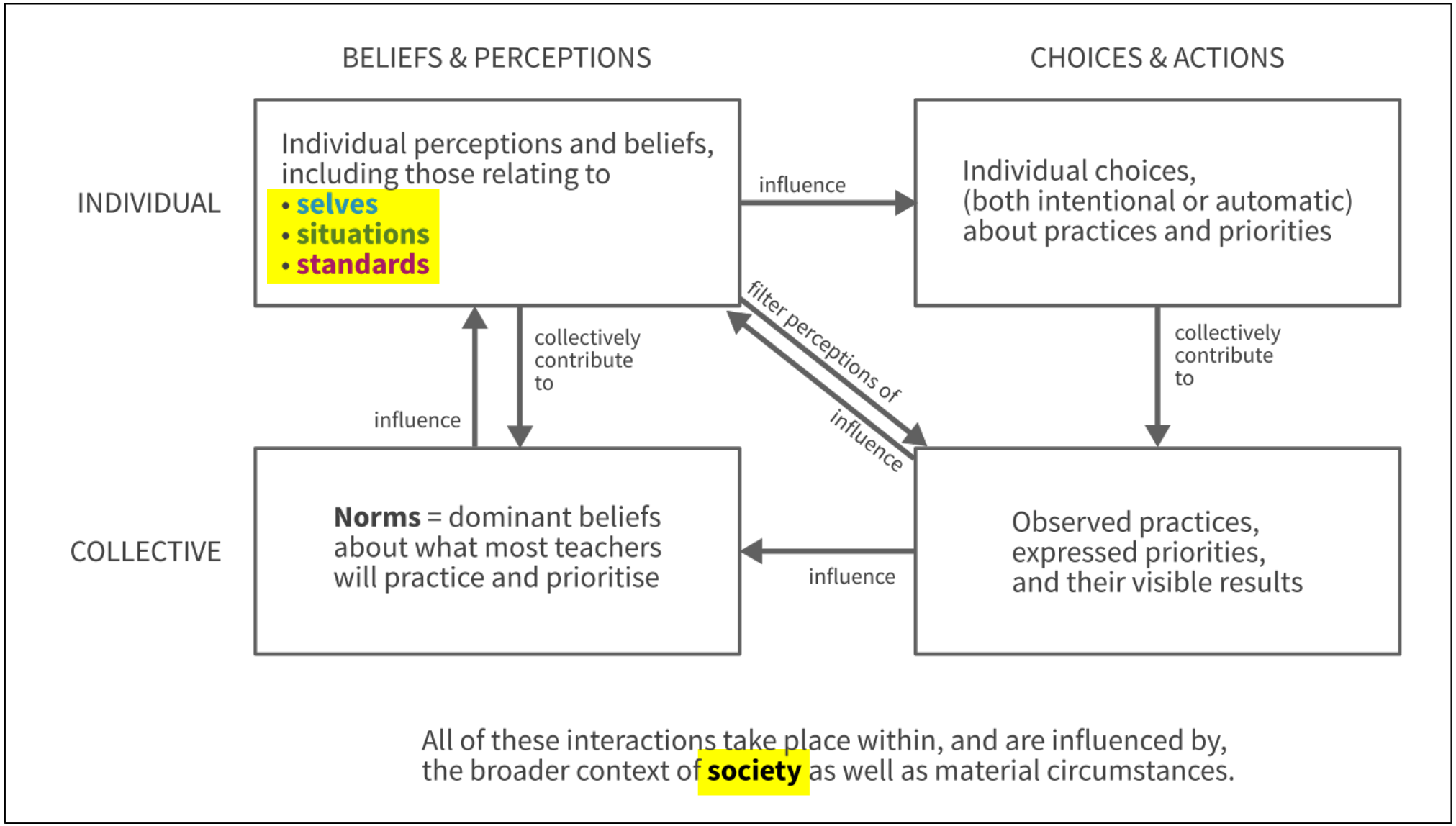

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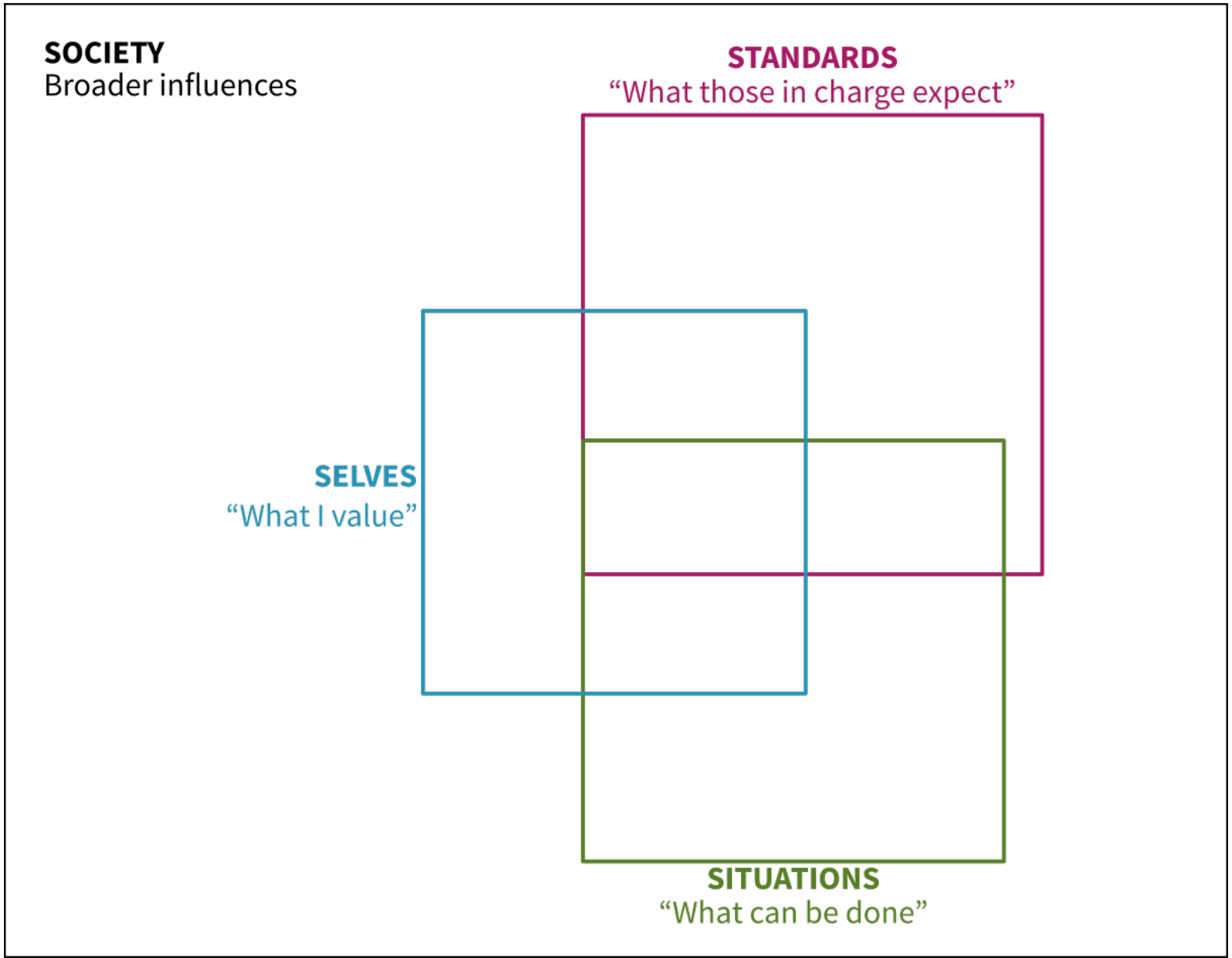
Conceptual framework …



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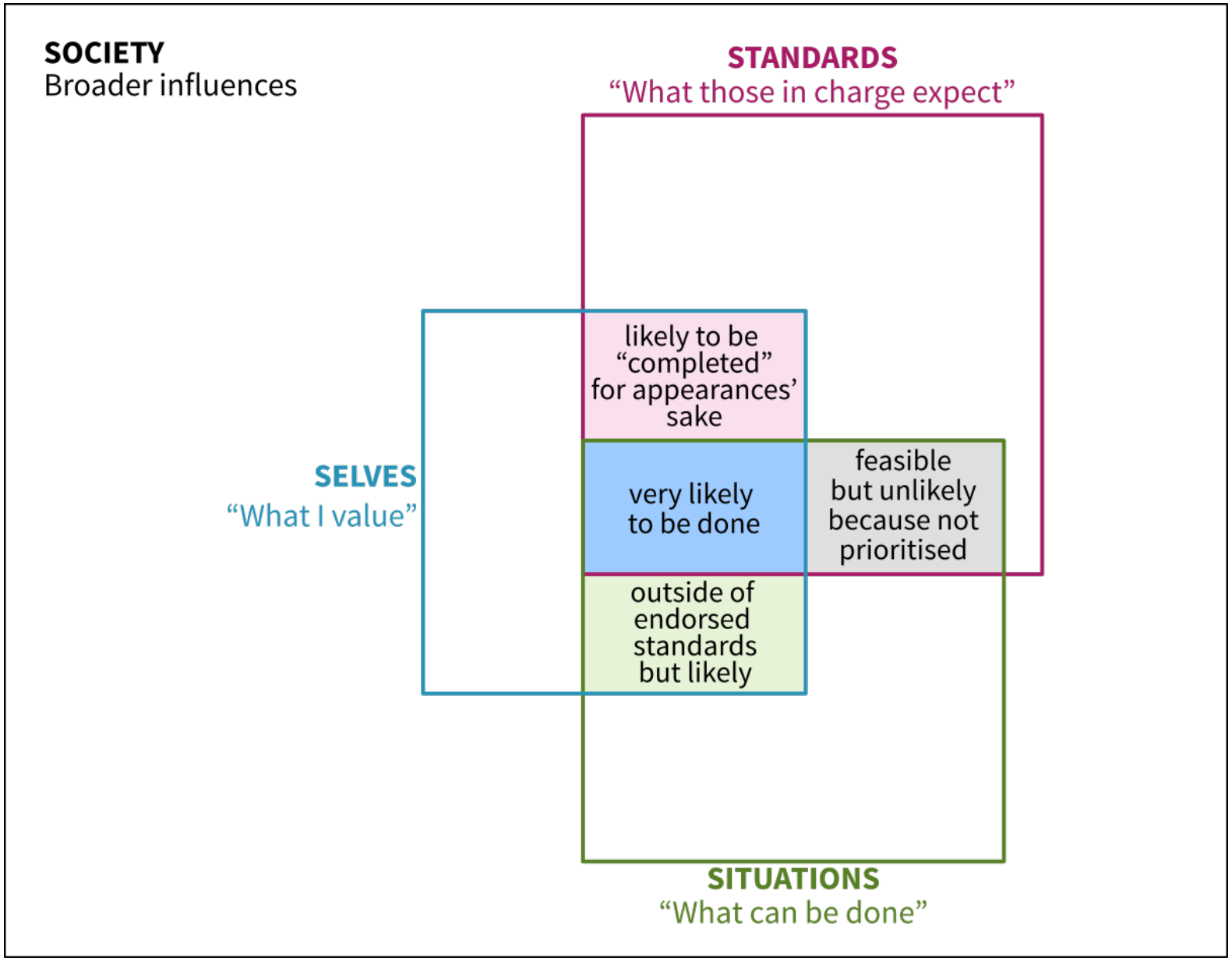
Conceptual framework … and how norms fit in

Working definition:
Teacher norms are dominant beliefs among teachers about what most teachers will practise and prioritise in a given context.

Note: norms can relate to what is **done** (*blue, pink, green*) or what is **not done** (*grey*)



Working hypothesis:
Norms are most likely to emerge at the intersections of what most teachers value (*selves*) and formal/informal expectations of employers (*standards*) and/or what is possible in their schools and classrooms (*situations*).

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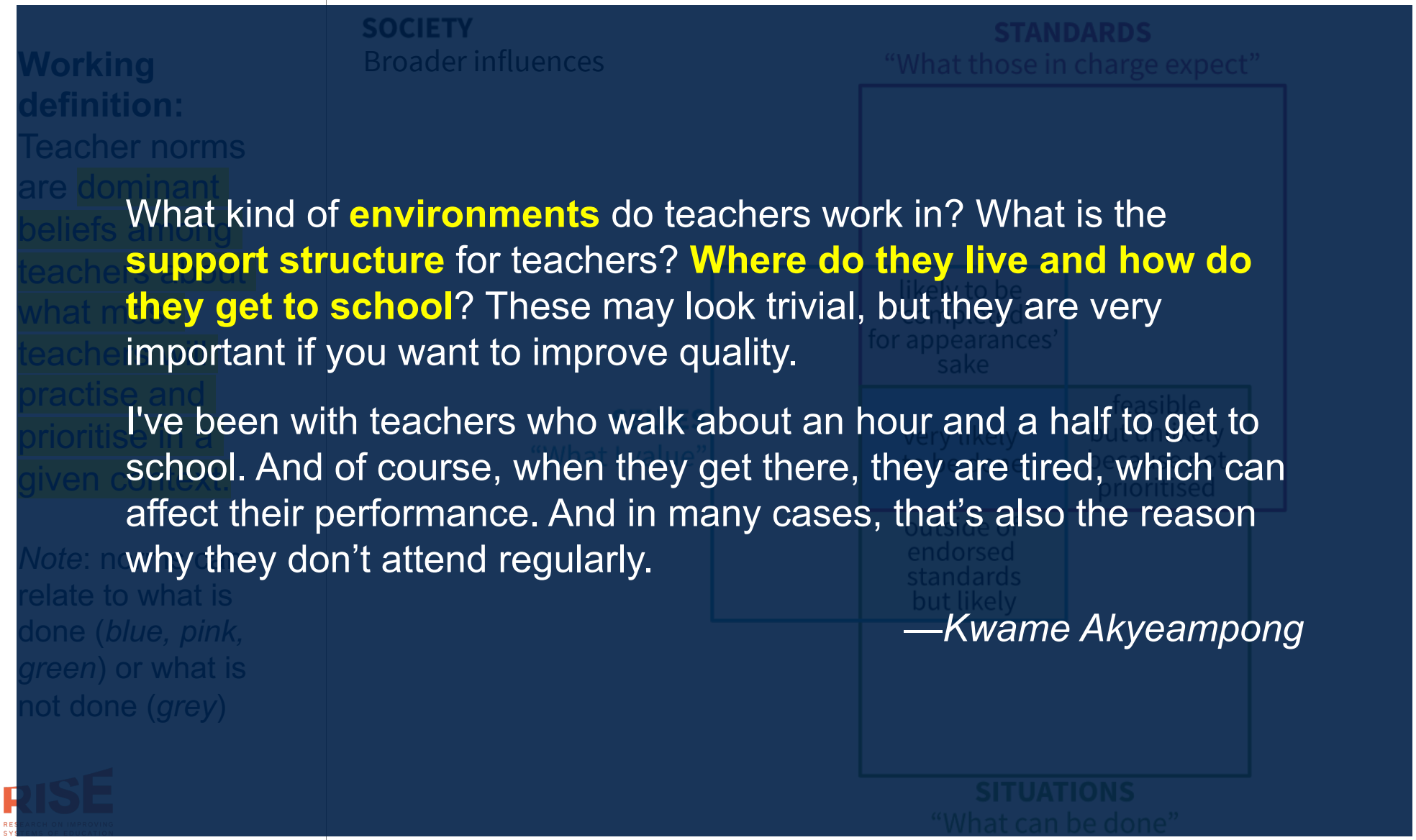
Conceptual framework … and how norms fit in



What kind of **environments** do teachers work in? What is the **support structure** for teachers? **Where do they live and how do they get to school**? These may look trivial, but they are very important if you want to improve quality.

I've been with teachers who walk about an hour and a half to get to school. And of course, when they get there, they are tired, which can affect their performance. And in many cases, that's also the reason why they don't attend regularly.

—*Kwame Akyeampong*

Working hypothesis: Norms are most likely to emerge at the intersections of what most teachers value (*selves*) and formal/informal expectations of employers (*standards*) and/or what is possible in their schools and classrooms (*situations*).

One framework I drew on: Saadi Lahlou's (2018) installation theory

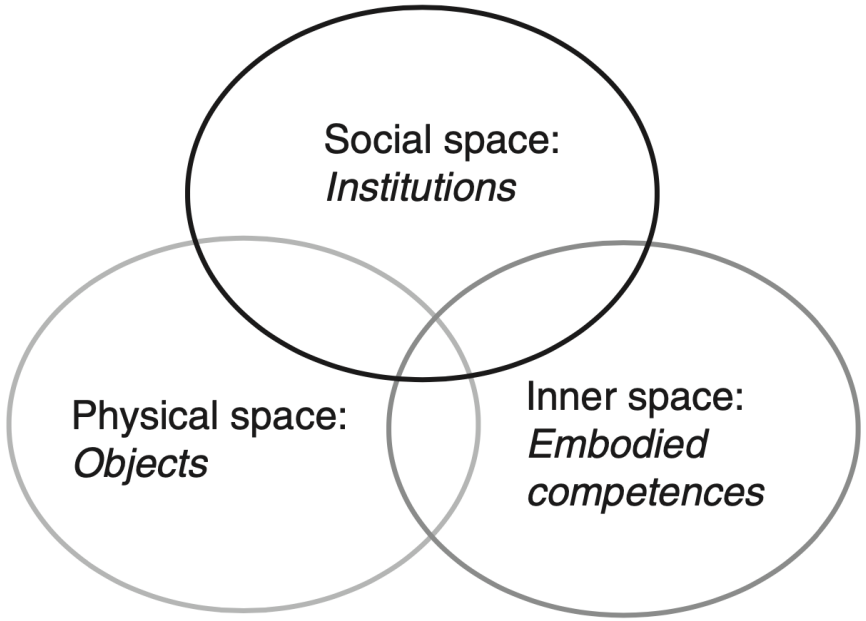


Figure 2.1. Sustainable behaviours are the ones supported by the three layers of the installation, in a zone here represented as the intersection of the three ovals.

Source: Lahlou (2018), Installation Theory, *p. 25*

"Installations consist of a set of components that simultaneously support and socially control individual behaviour. The components are distributed over the physical space (**affordances**), the subject (**embodied competences**) and the social space (**institutions**, enacted and enforced by other subjects)."

—Lahlou, 2018, p. 428

Example: boarding a plane at an airport

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(Other key theoretical references include: Lipsky, 1980, on street-level bureaucrats; Bronfenbrenner, 1979, on embeddedness in ecological systems; Bicchieri, 2017, on social norms; March & Olsen, 2008. on logic of appropriateness; Hobbiss, Sims, & Allen, 2021, on habit formation and teacher effectiveness)

Conceptual framework … and how norms fit in

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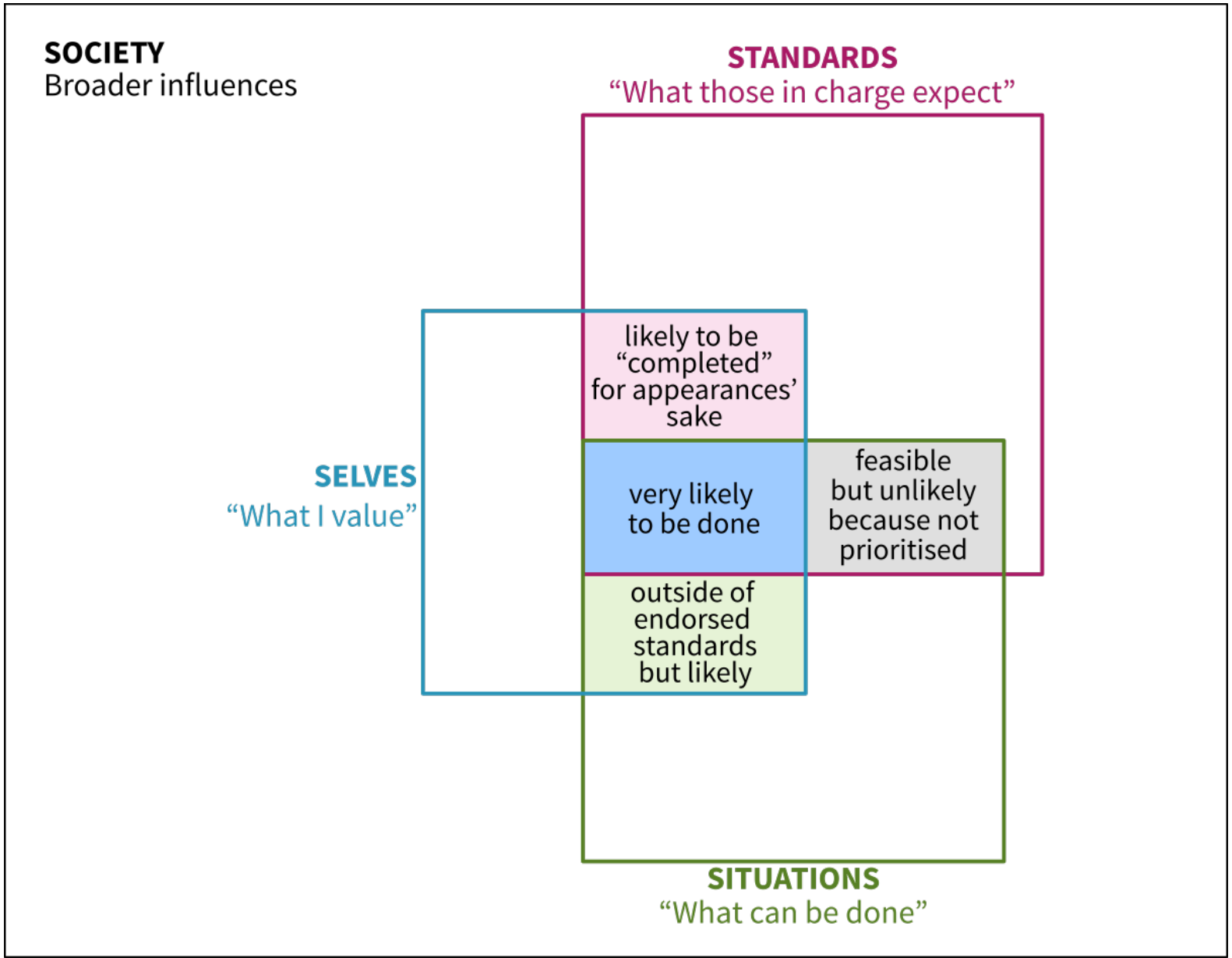
Teacher norms are dominant beliefs among teachers about what most teachers will practise and prioritise in a given context.



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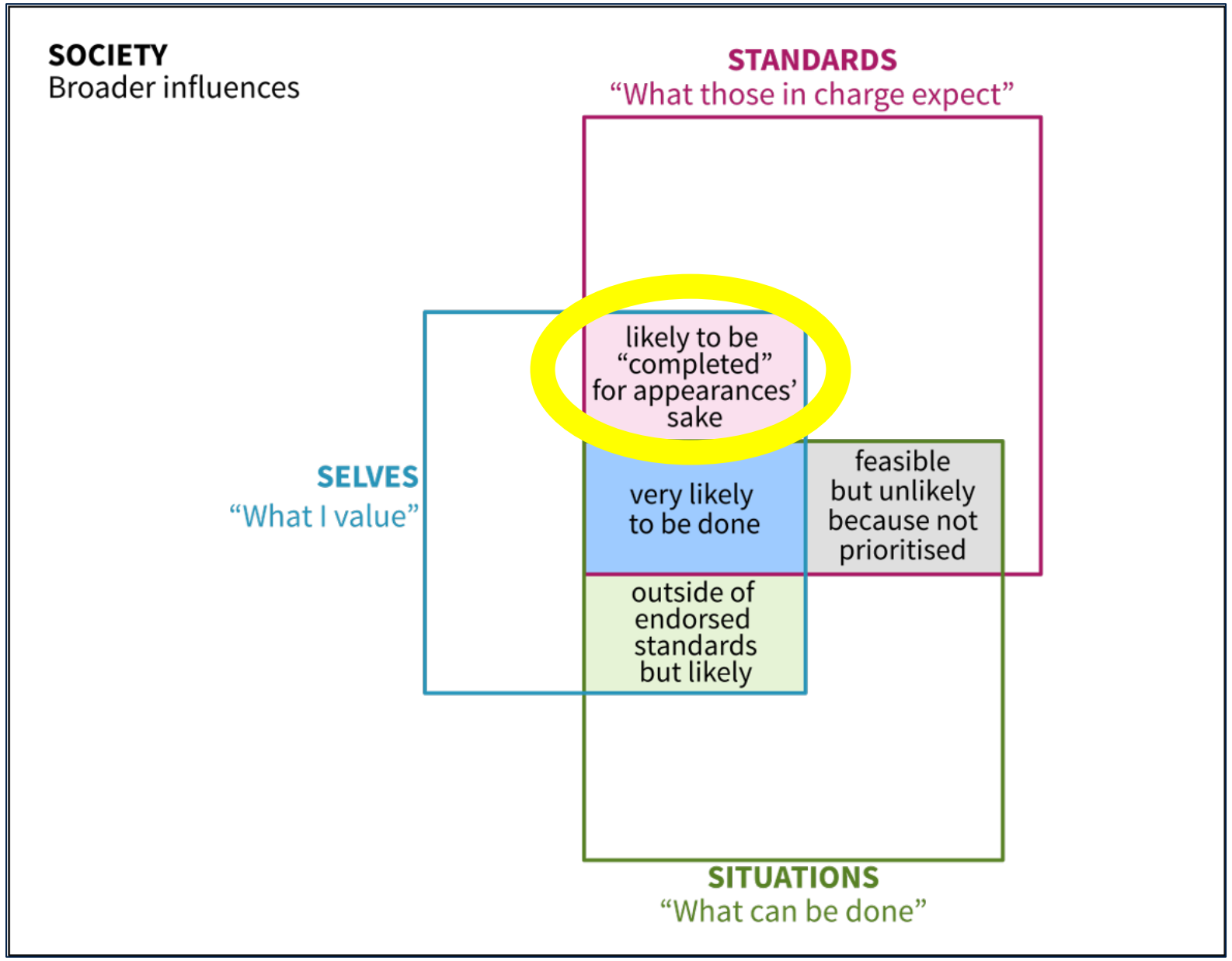
Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)



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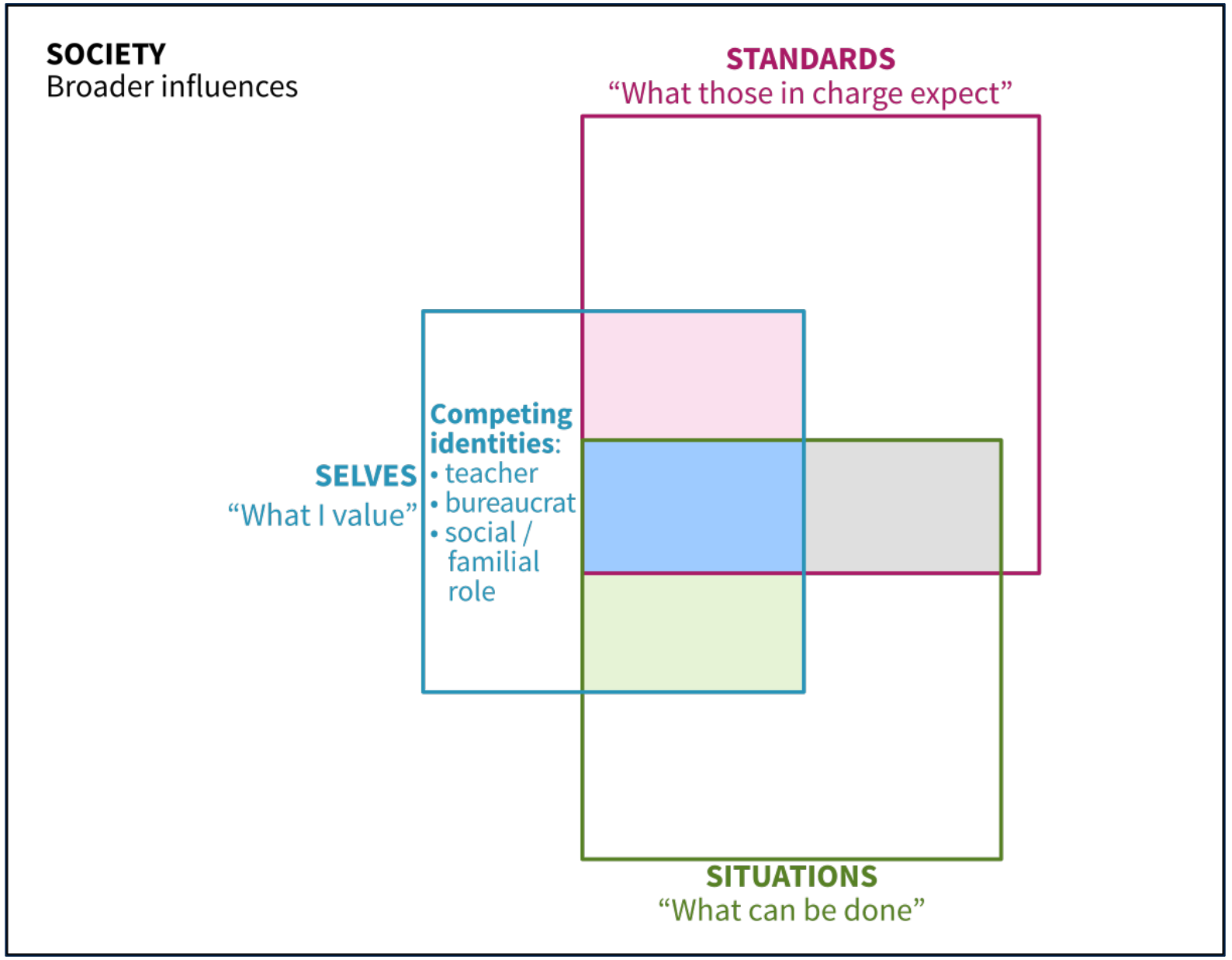
Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

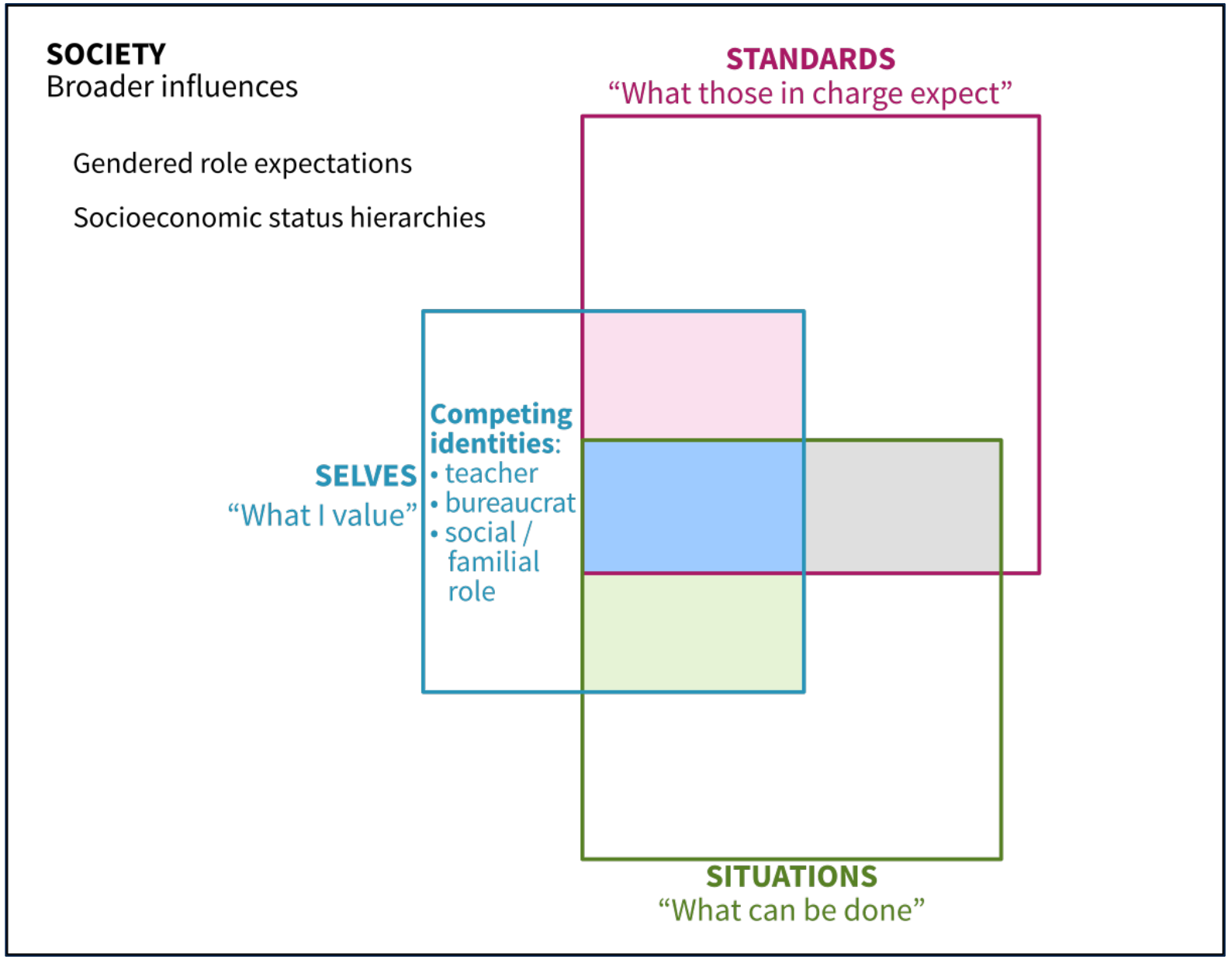
"Initially, I started the project with a question around two-way identity, which was that these teachers are both **teachers** and **bureaucrats**. But then, as I went deeper into the fieldwork, I realised that they're carrying **at least three sources of identity** at any given time."



Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

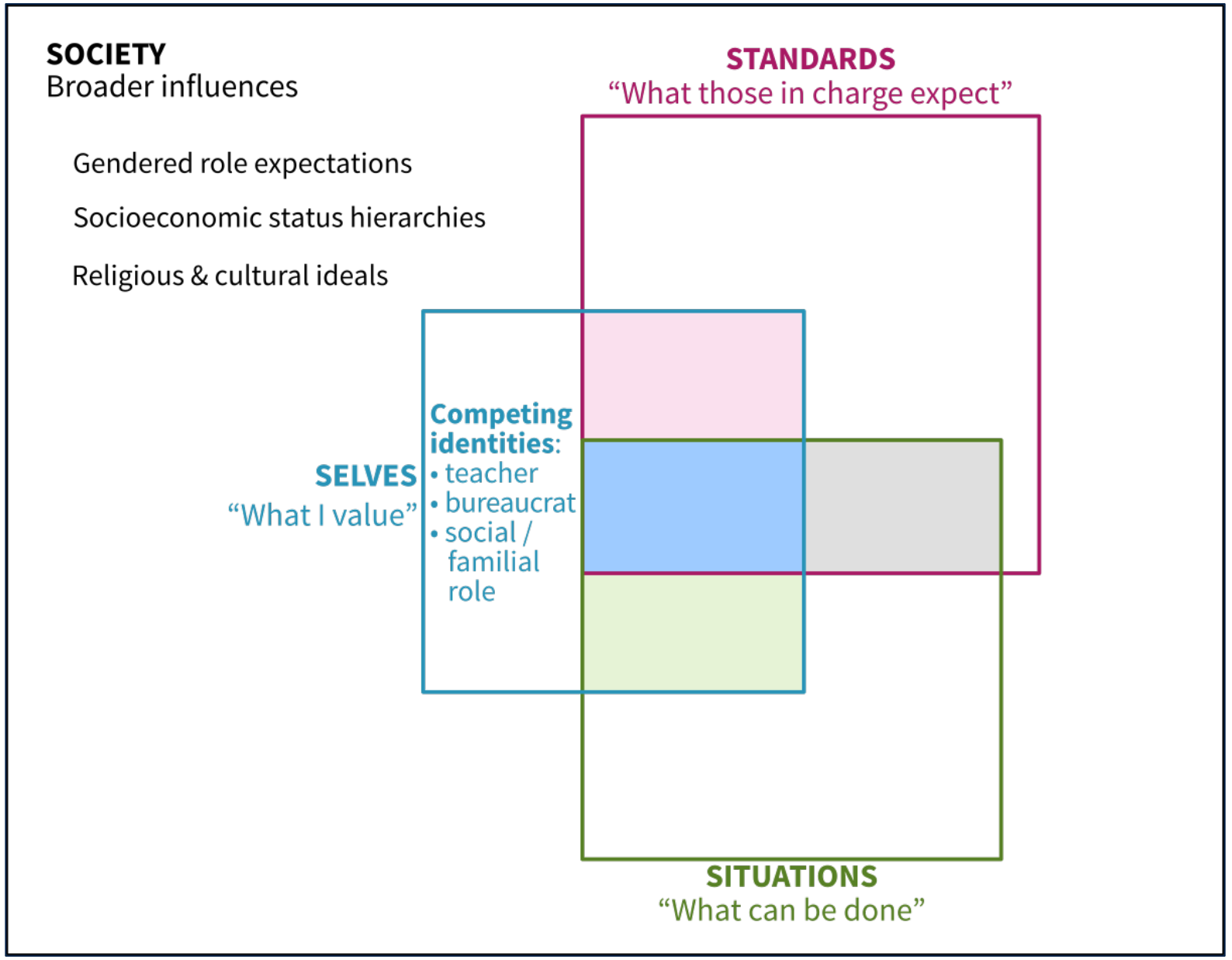
"For the female teachers, **it's about being somebody's mother, or daughter, or sister**, … this was a nicer place to be compared to the alternative of being stuck at home.

"Contrastingly, for the men, … this is a makeshift arrangement, and that, **'This is where we are until we find a better job'**…"



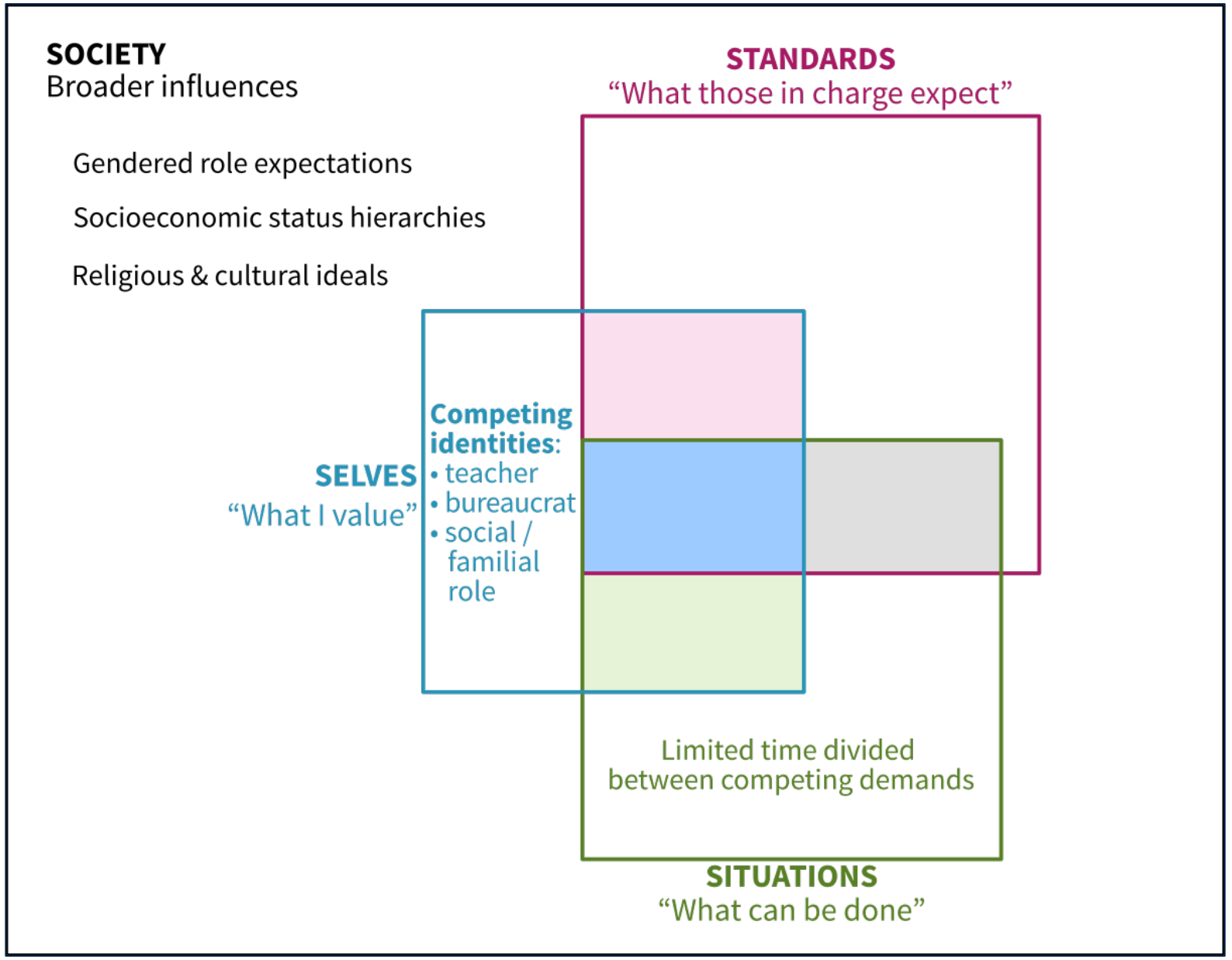
Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

"KP within Pakistan is predominantly Muslim. … Also, KP is predominantly Pakhtun. So there are **certain cultural sentiments and drivers of teacher norms**, which are very homogenous … And one of them is **the association of teaching with the life of the Prophet Muhammad**, and this idea that he was a teacher, he was a reformer, he was a thinker, and he was a progressive."



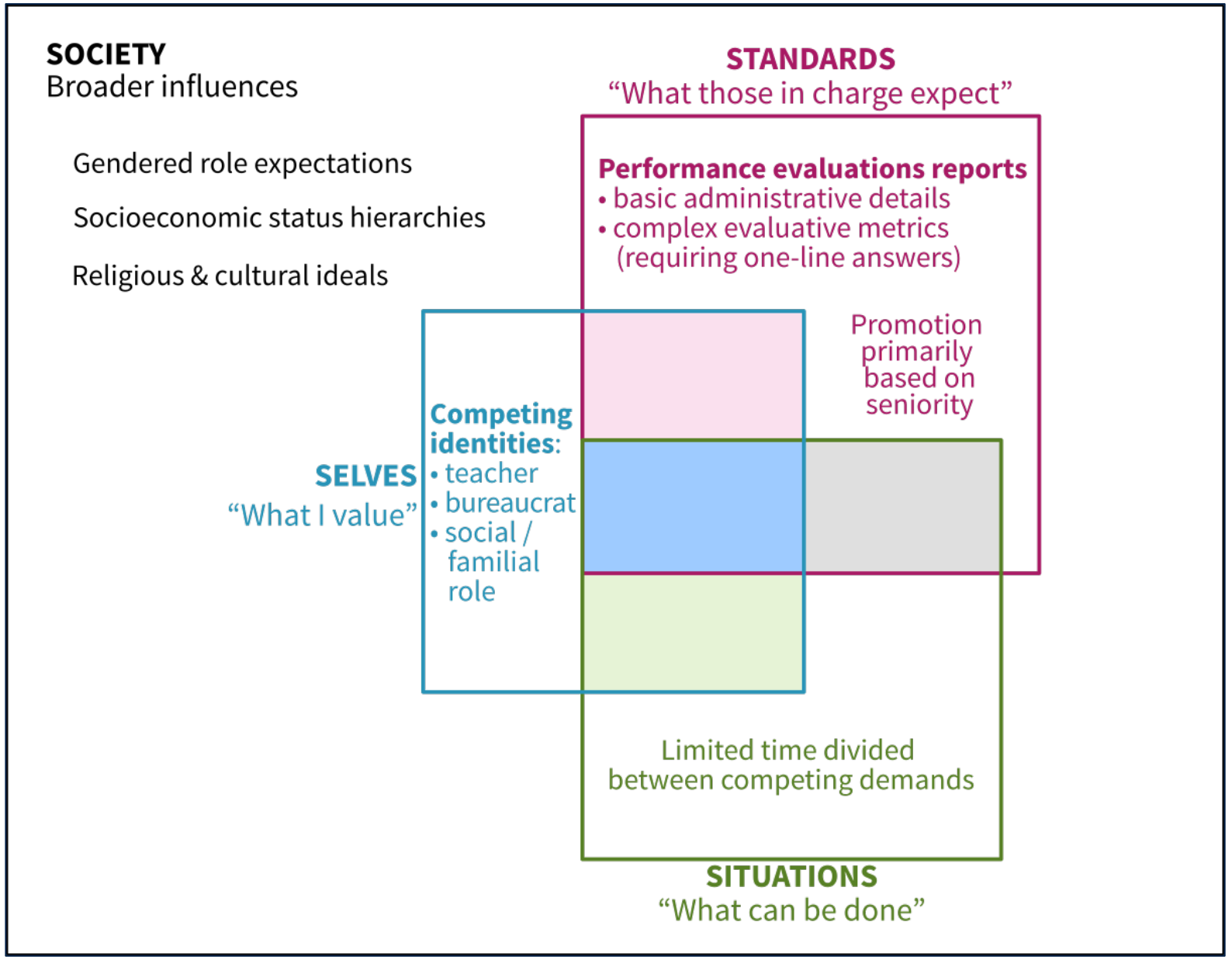
Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

"… **this multiple split**
of who you are
and what you're supposed
to be doing during the day
is constantly determining
how much time
is ultimately dedicated
to a coherent learning
process.



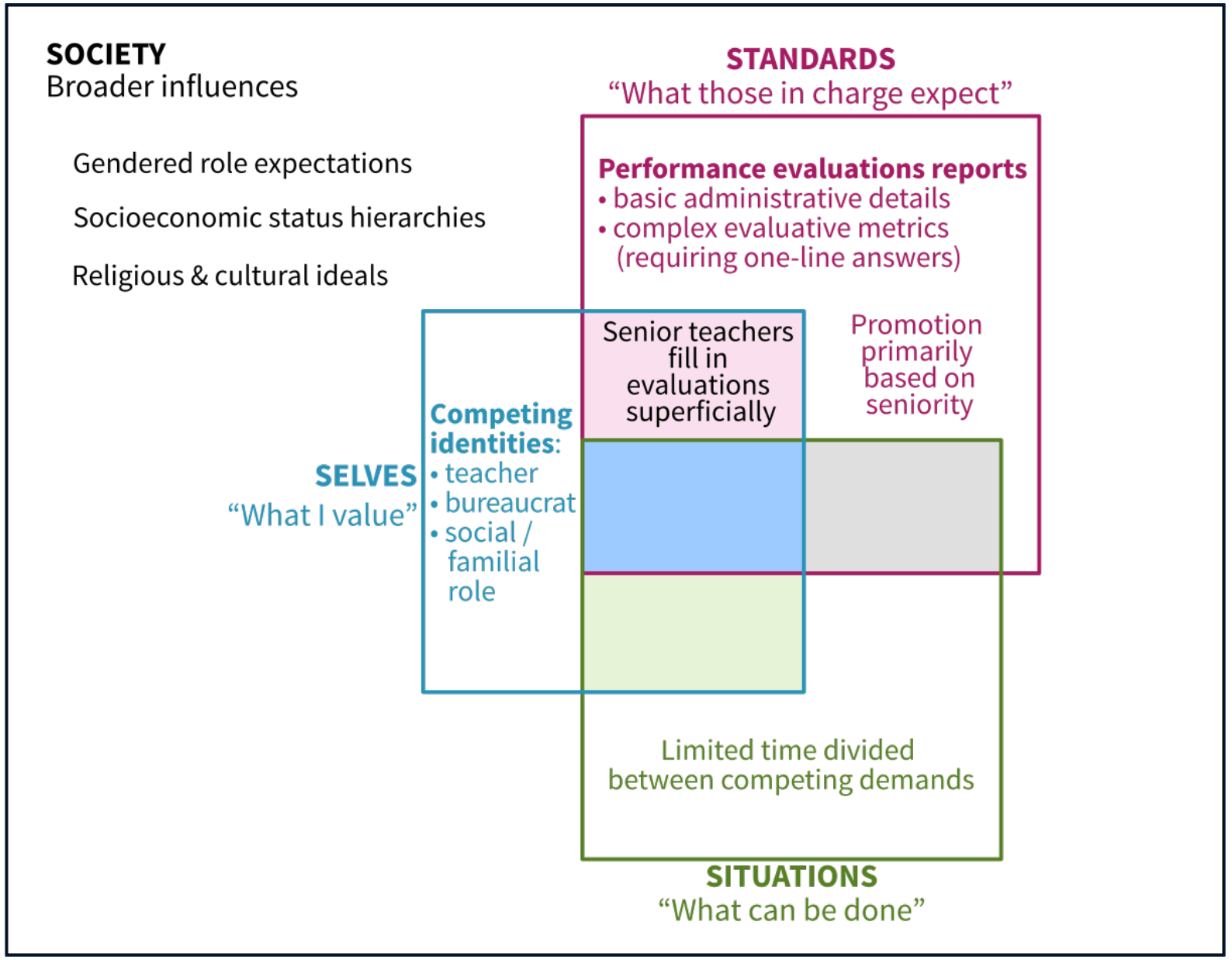
Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

"And then the particulars that count for evaluation metrics are, for example, number one: "Judgement and sense of proportion".
And there's **no rubric** to explain what in the world that means. …
And for the responses,
… there's just a short line.
You're supposed to capture all these really complex and difficult ways of being into a line. "



Example 1: teacher identities and performance evaluation reports in Khyber Pakhtunkhwa, Pakistan (Soufia Siddiqui)

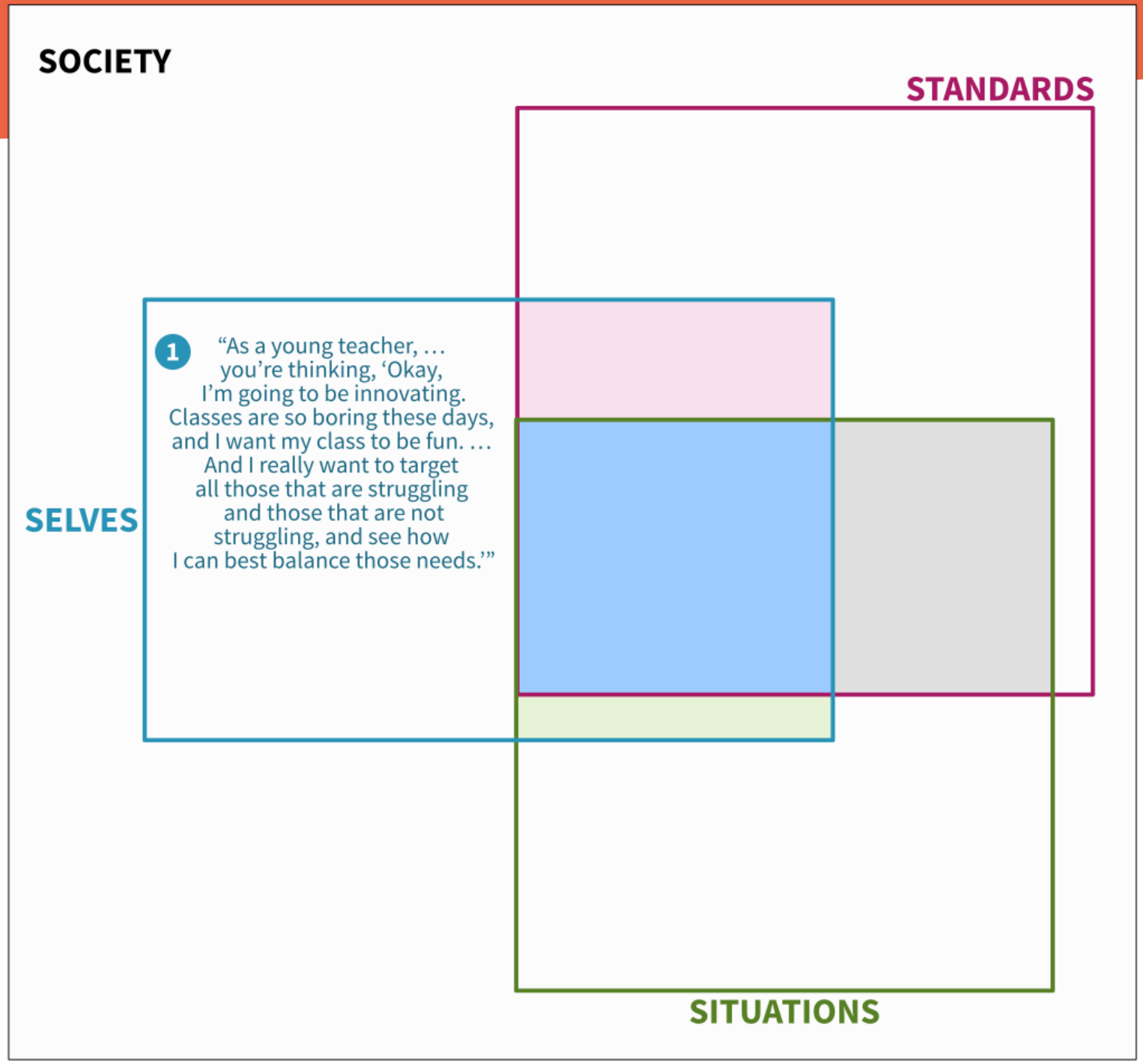
"I asked them to explain to me, 'How would you fill this out?' They said, 'We wouldn't. **We would just write, "Good," "Good," "Good," "Good," "Good."** **Who has time to unpack what any of this means** or whether they're doing it in the classroom?'"



Example 2: a novice teacher in Botswana (Katlego Sengadi)

"As a young teacher, …
you're thinking,
'Okay, I'm going to be innovating.
Classes are so boring
these days,
and I want my class to be fun. …

"'And I really want to target
all those that are struggling
and those that are not struggling,
and see how I can best
balance those needs.'"



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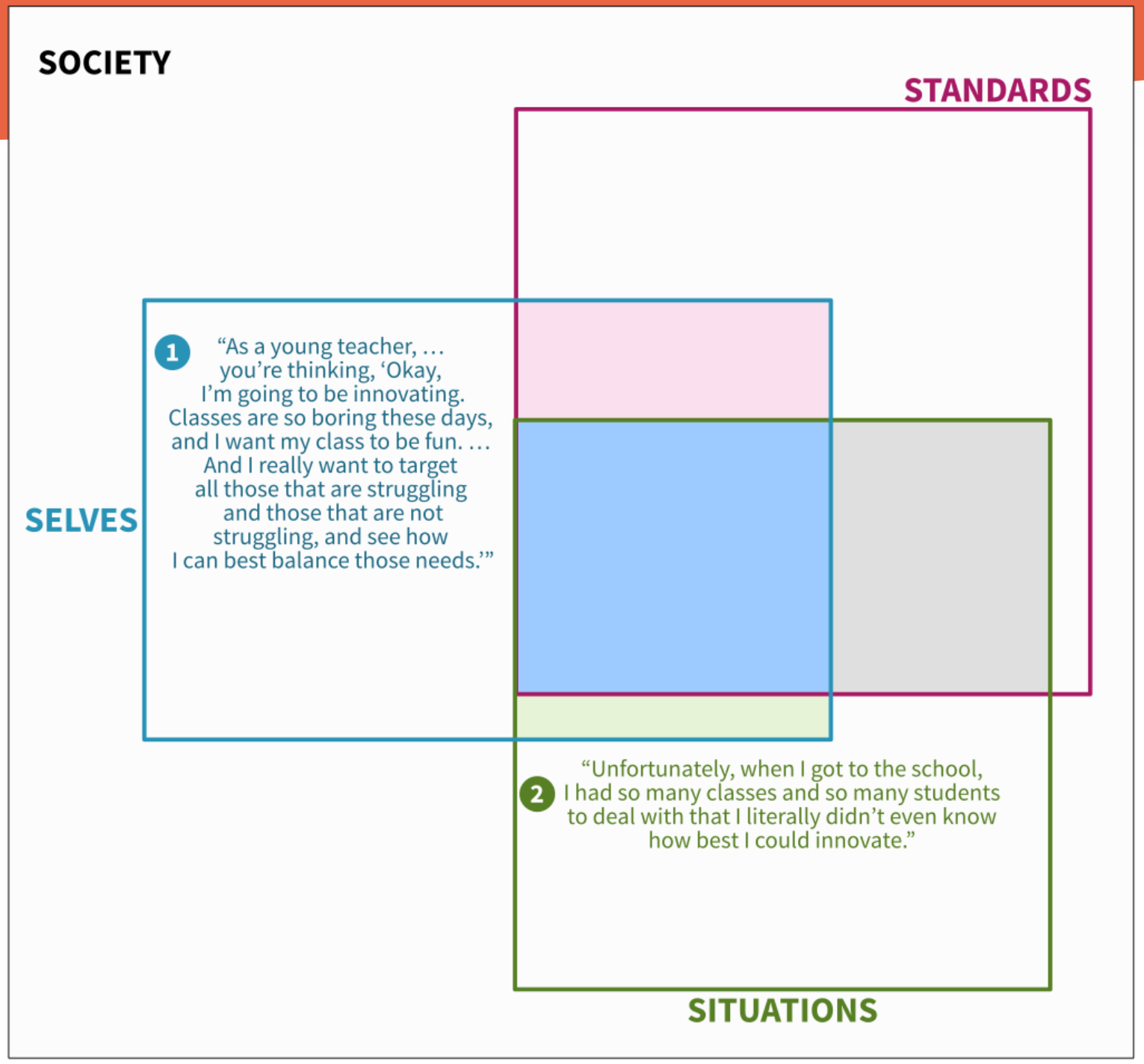
"Unfortunately,
when I got to the school,
I had so many classes and so
many students to deal with
that I literally didn't even know
how best I could innovate."



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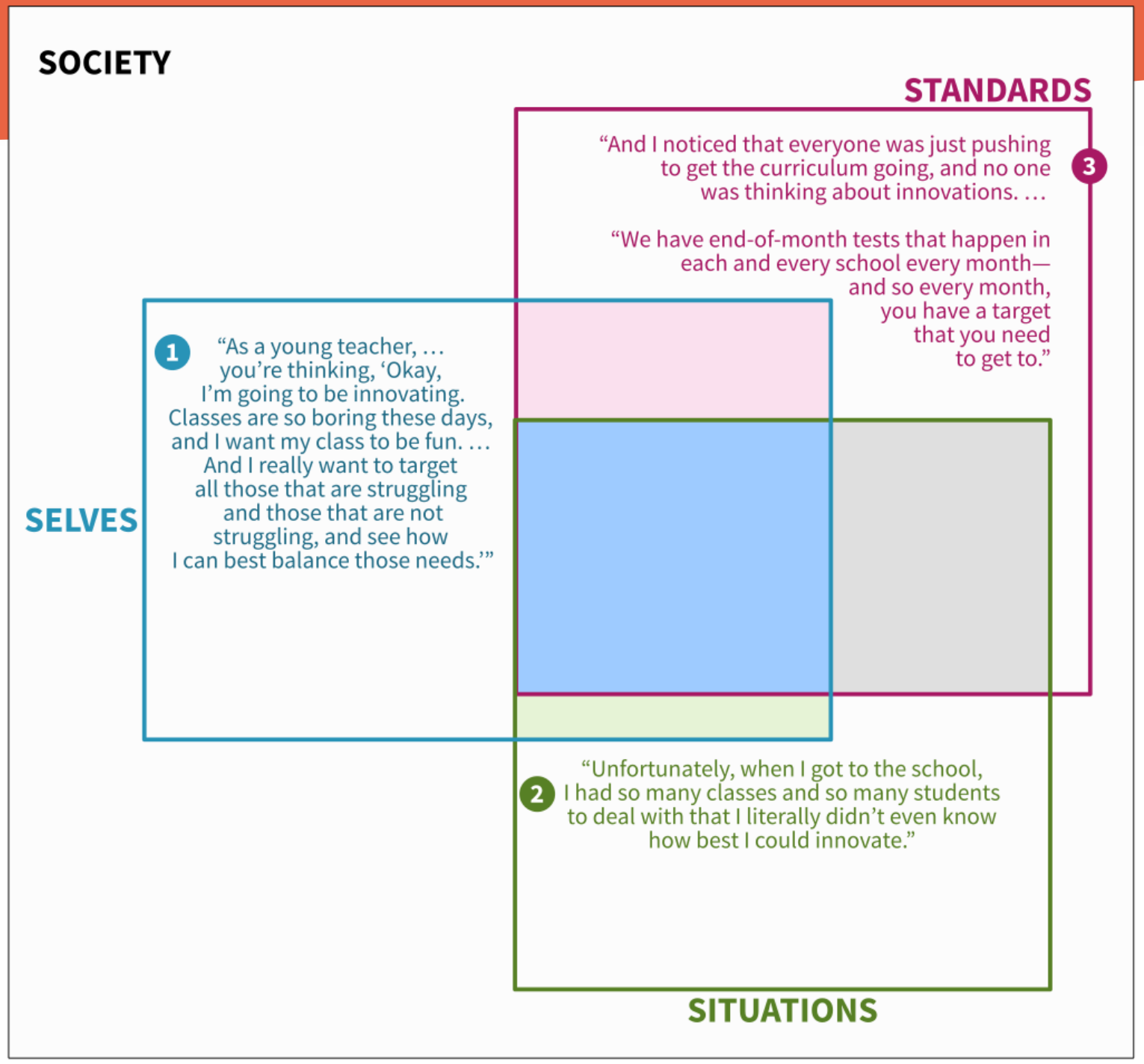
Example 2: a novice teacher in Botswana (Katlego Sengadi)

"And I noticed that everyone was just pushing to get the curriculum going, and no one was thinking about innovations. …

"We have end-of-month tests that happen in each and every school every month —and so every month, you have a target that you need to get to."



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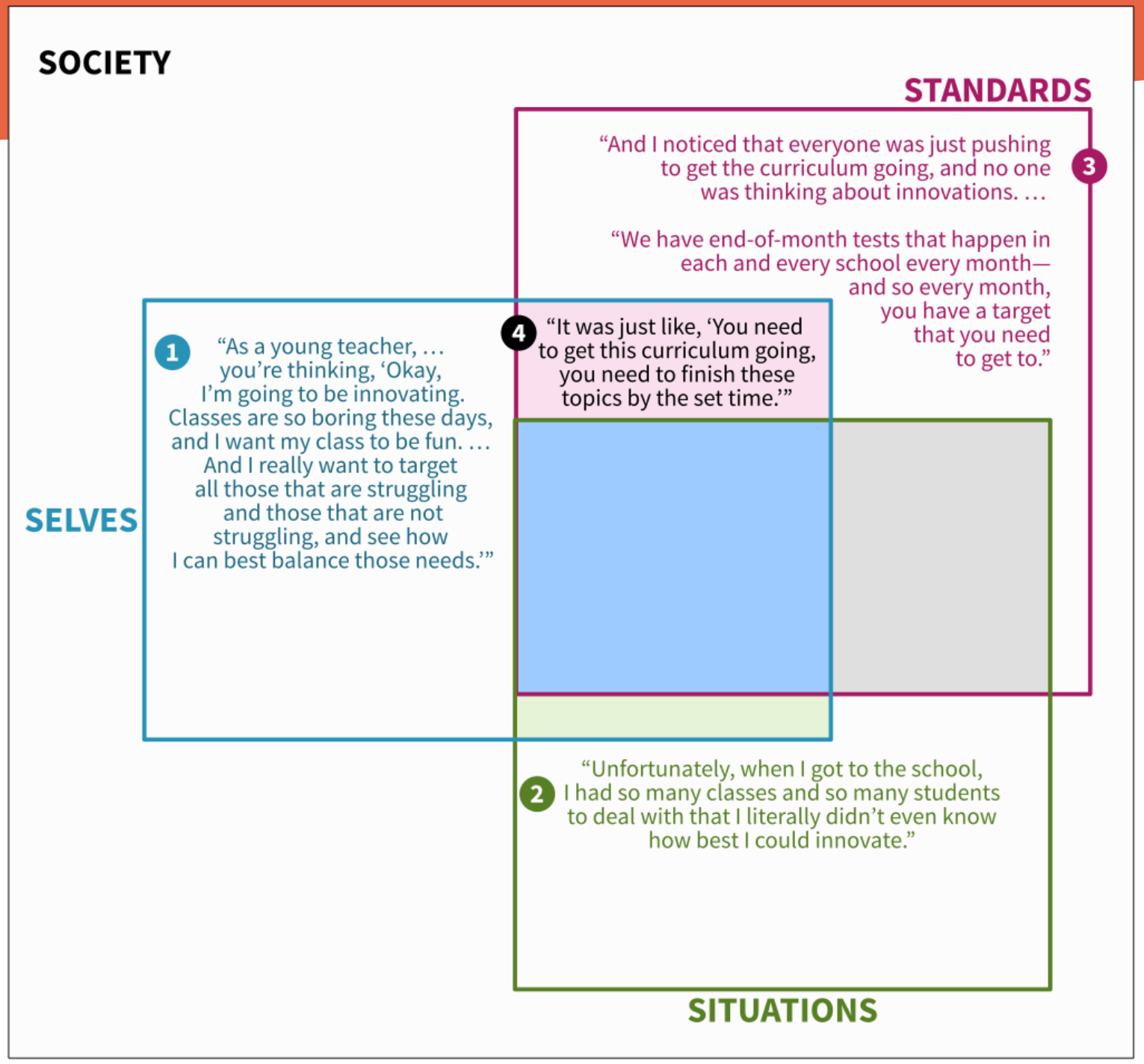
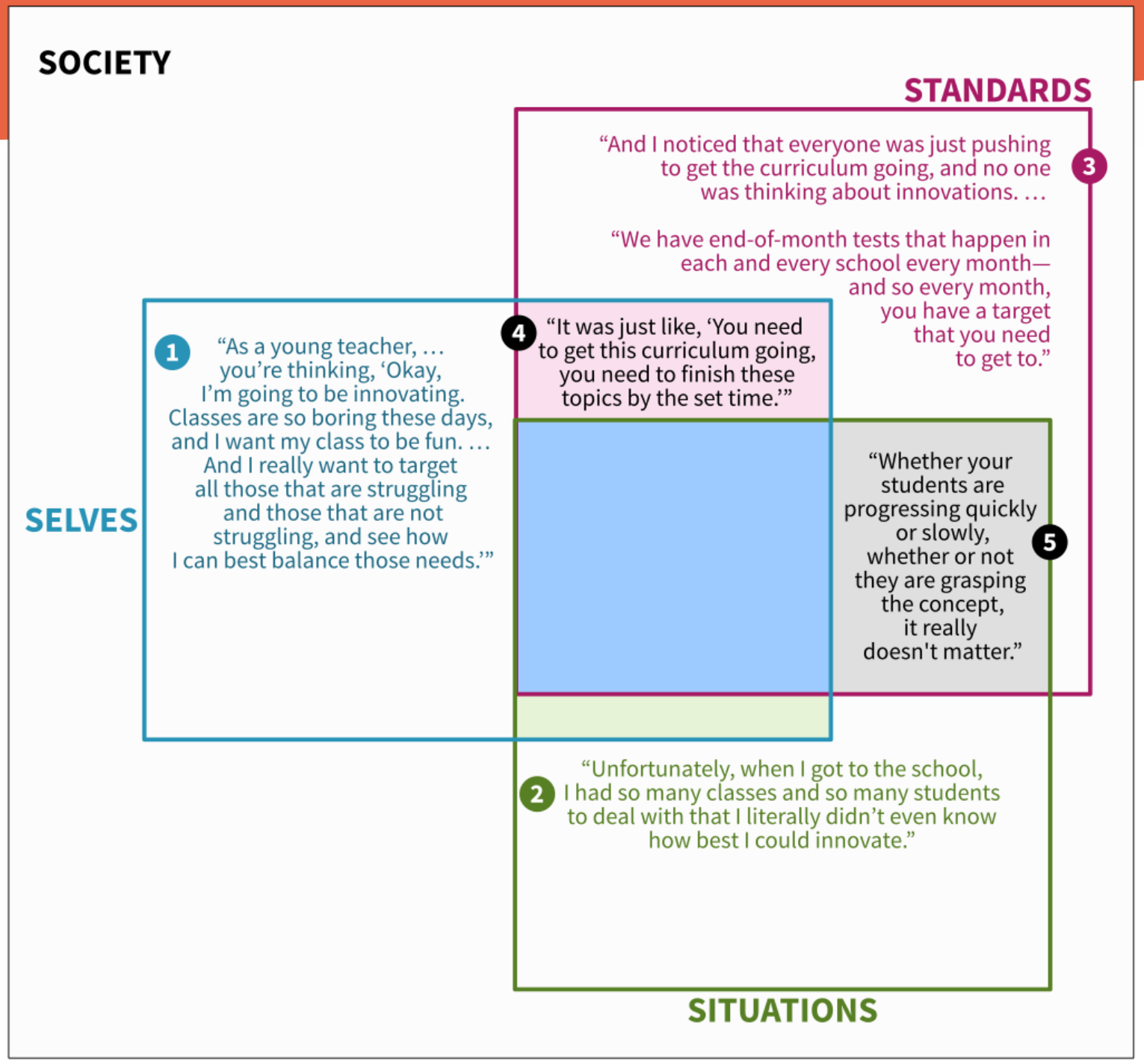
"It was just like, 'You need to get this curriculum going, you need to finish these topics by the set time.'"



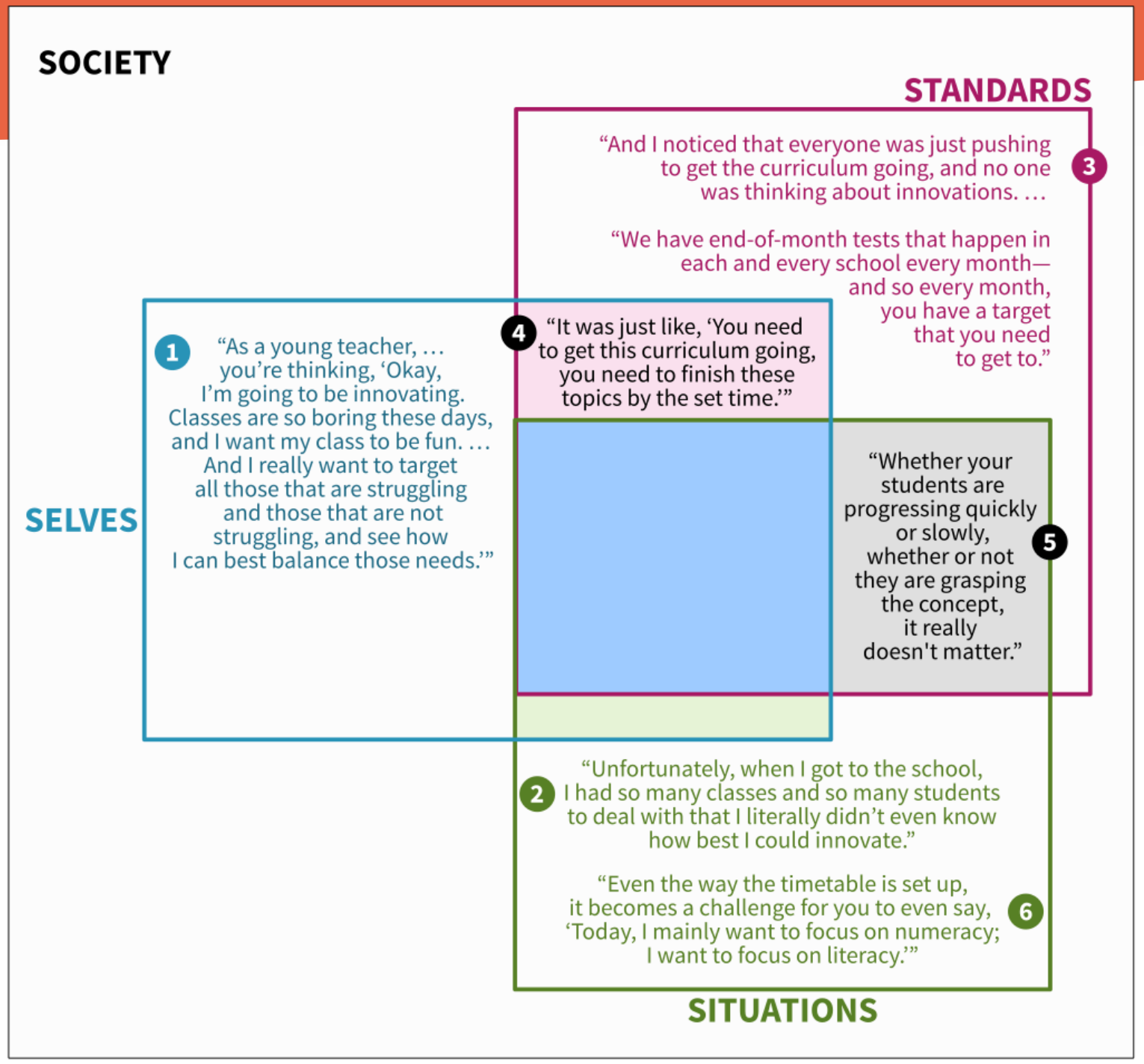
Example 2: a novice teacher in Botswana (Katlego Sengadi)

"Whether your students are progressing quickly or slowly, whether or not they are grasping the concept, it really doesn't matter."



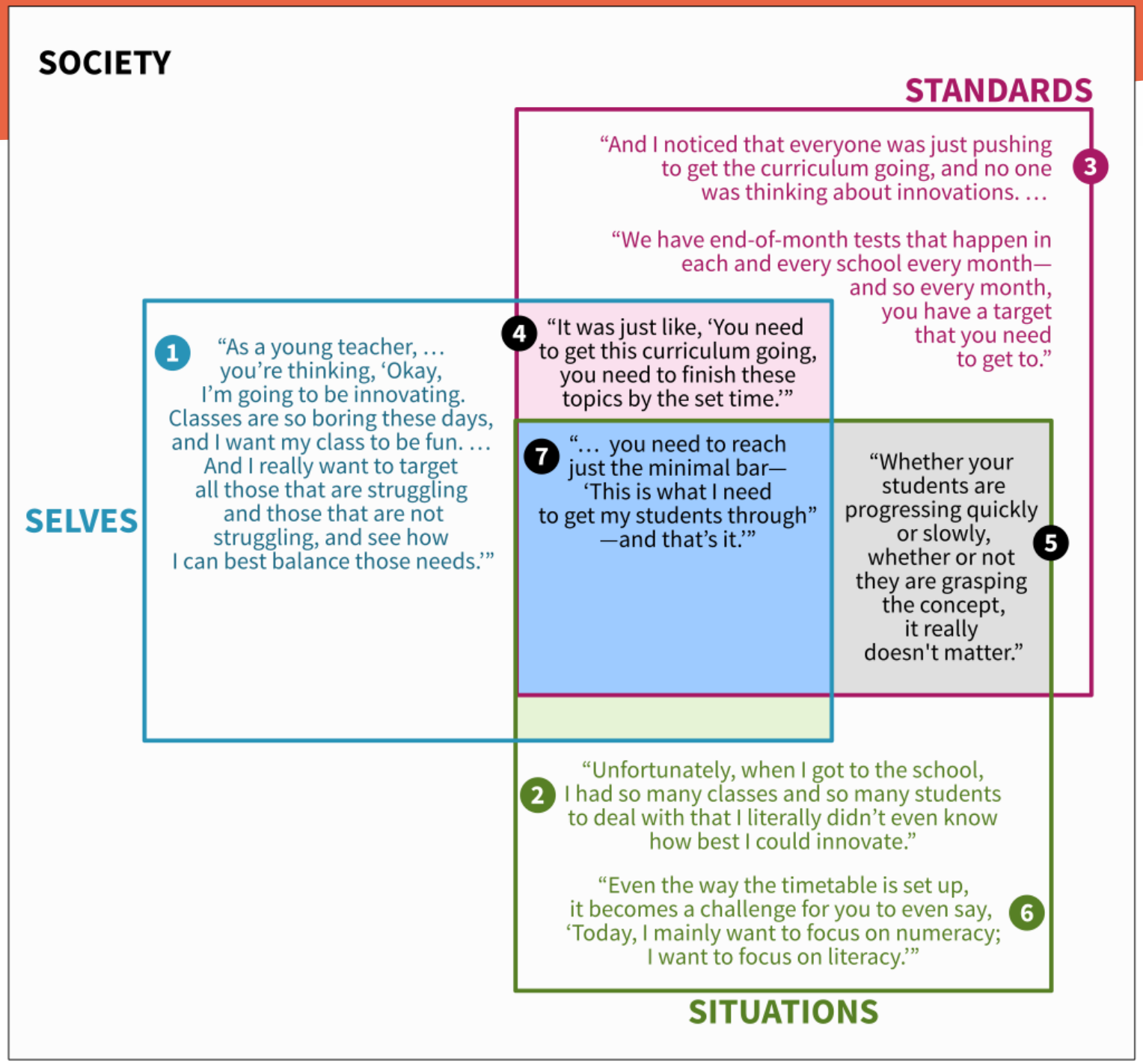
Example 2: a novice teacher in Botswana (Katlego Sengadi)

"Even the way
the timetable is set up,
it becomes a challenge
for you to even say,
'Today, I mainly want
to focus on numeracy;
I want to focus on literacy.'"



Example 2: a novice teacher in Botswana (Katlego Sengadi)

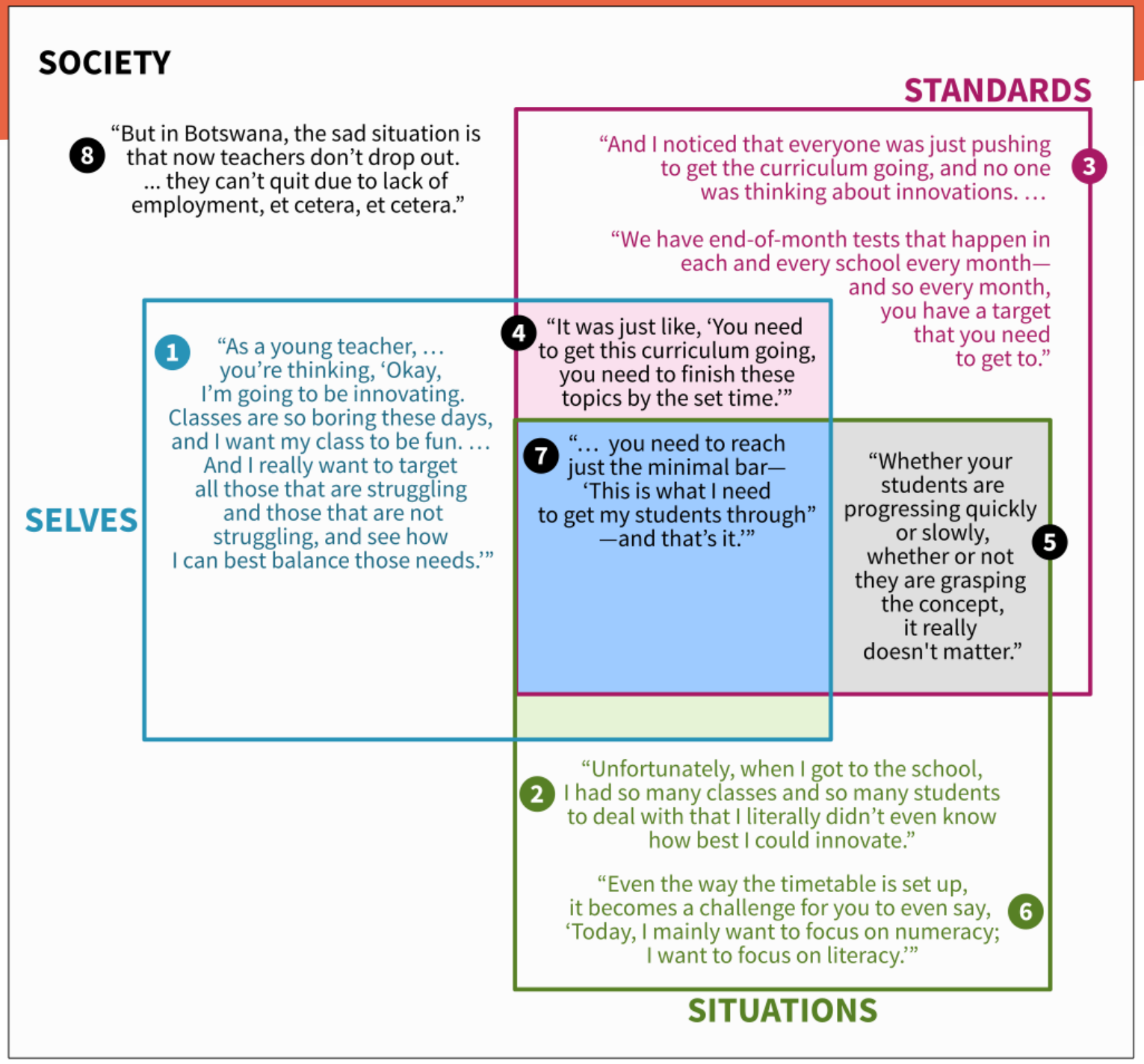
"… you need to reach just the minimal bar— 'This is what I need to get my students through" —and that's it.'"



Example 2: a novice teacher in Botswana (Katlego Sengadi)

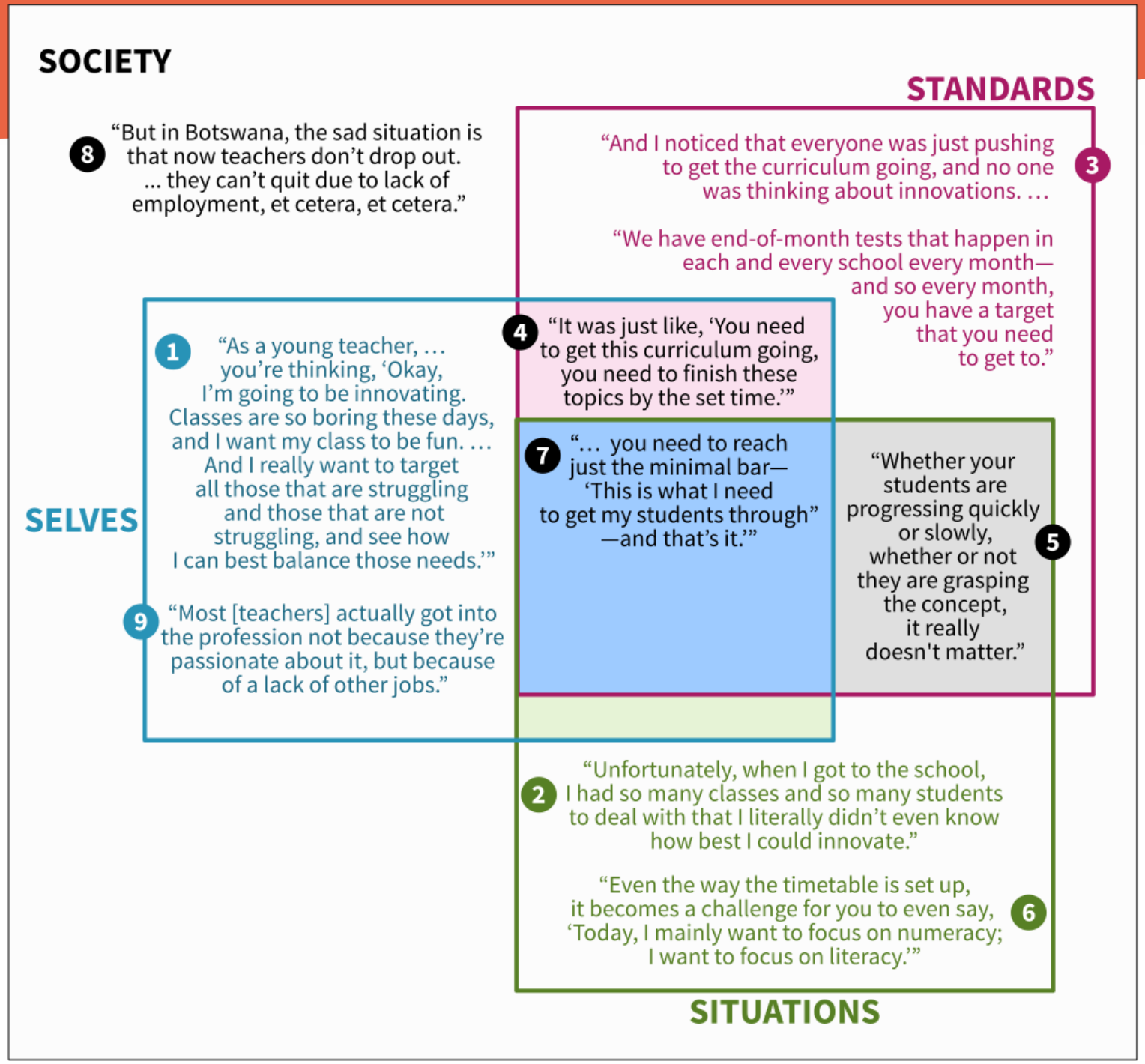
"But in Botswana,
the sad situation
is that now
teachers don't drop out.
... they can't quit
due to lack of employment,
et cetera, et cetera."

Note: similar experiences described by other interlocutors



Example 2: a novice teacher in Botswana (Katlego Sengadi)

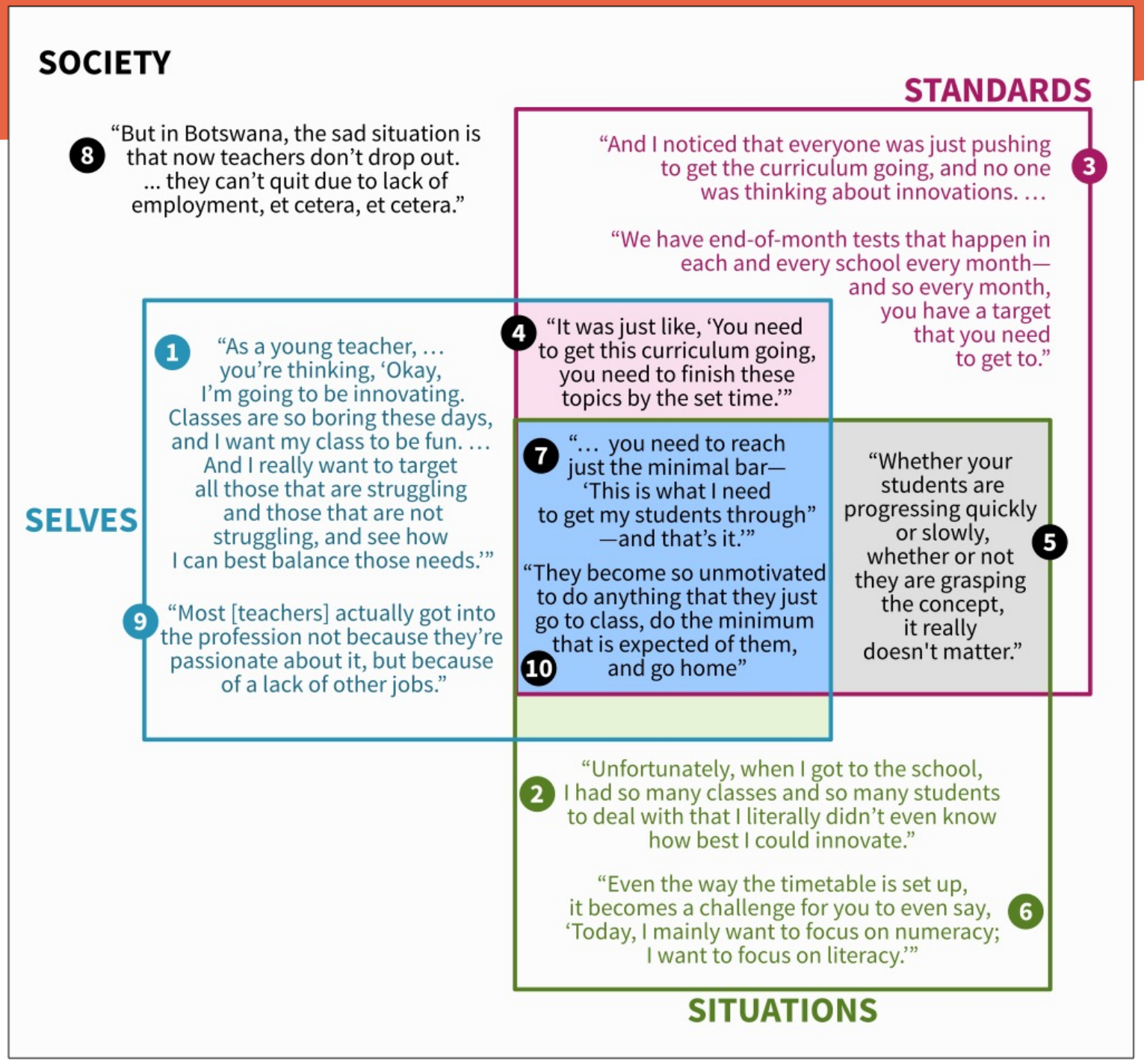
"Most [teachers] actually got into the profession not because they're passionate about it, but because of a lack of other jobs."



Example 2: a novice teacher in Botswana (Katlego Sengadi)

"They become so unmotivated
to do anything
that they just go to class,
do the minimum
that is expected of them,
and go home"

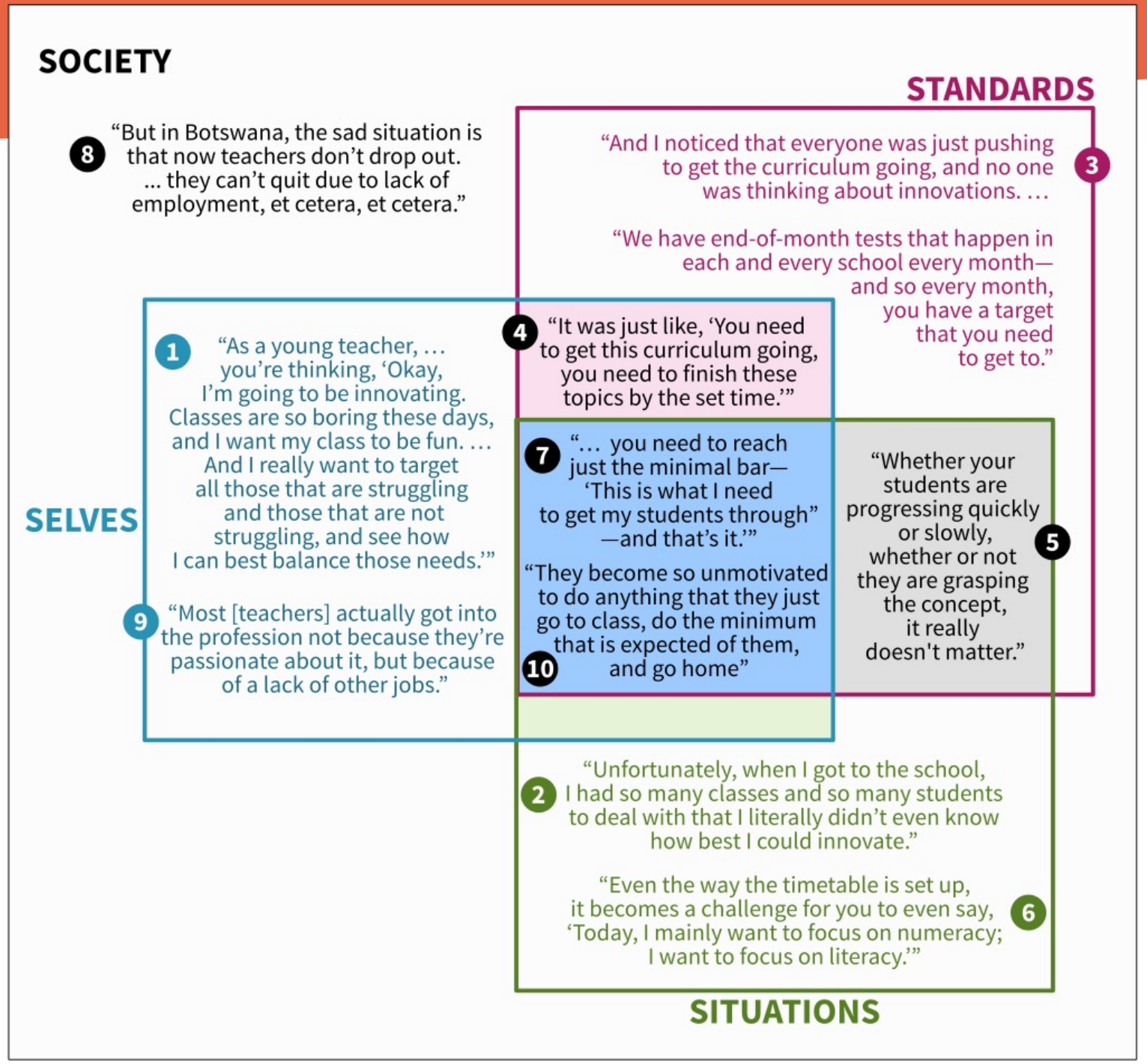
Note: similar experiences described by other interlocutors



Example 2: a novice teacher in Botswana (Katlego Sengadi)

Lahlou (2018), *Installation Theory*, p. 33

"In a nutshell, installations, because of their redundant threefold structure, have enough resilience and regulatory power to channel 'appropriate' behaviour even in novice or reluctant subjects. As a consequence, novices *learn by doing*: subjects are socialized into cultural skills by being channelled into experiencing appropriate practice, within local installations. …"



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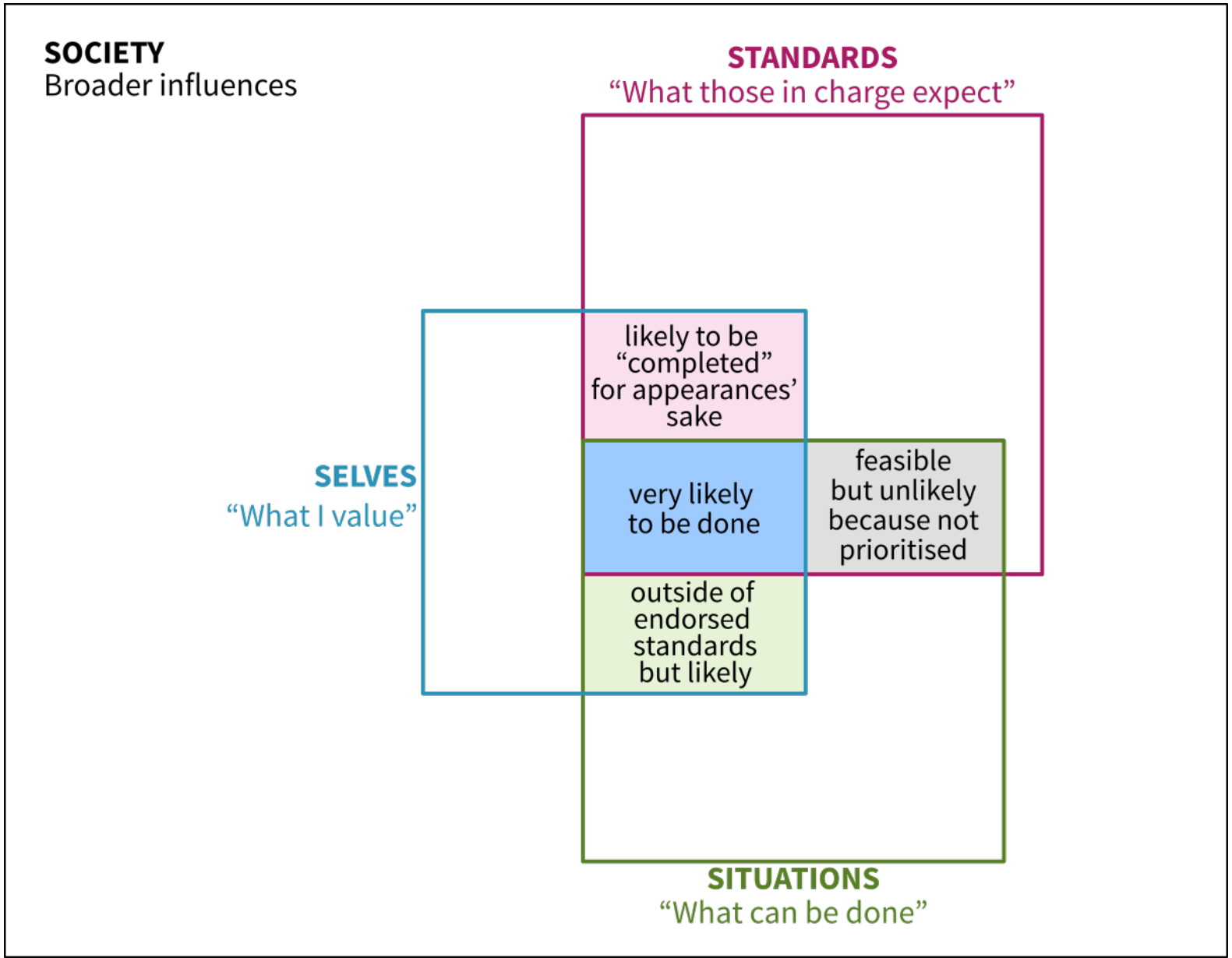
Teacher norms are dominant beliefs among teachers about what most teachers will practise and prioritise in a given context.



Working hypothesis:
Norms are most likely to emerge at the intersections of what most teachers value (*selves*) and formal/informal expectations of employers (*standards*) and/or what is possible in their schools and classrooms (*situations*).

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Testing the hypothesis (i): the second round of coding (*in the spirit of grounded theory's theoretical coding*)

Transcripts were analysed using a coding scheme with categories including:

Norms-content

e.g.

- practices-collaboration, mentoring, collegiality
- priorities-compliance

Factors-content

e.g.

- environment-children's needs
- narratives-definitions of teacher quality

Norms-dominance

e.g.

- practices-likely to be done superficially
- priorities-held by most or all

Factors-domains

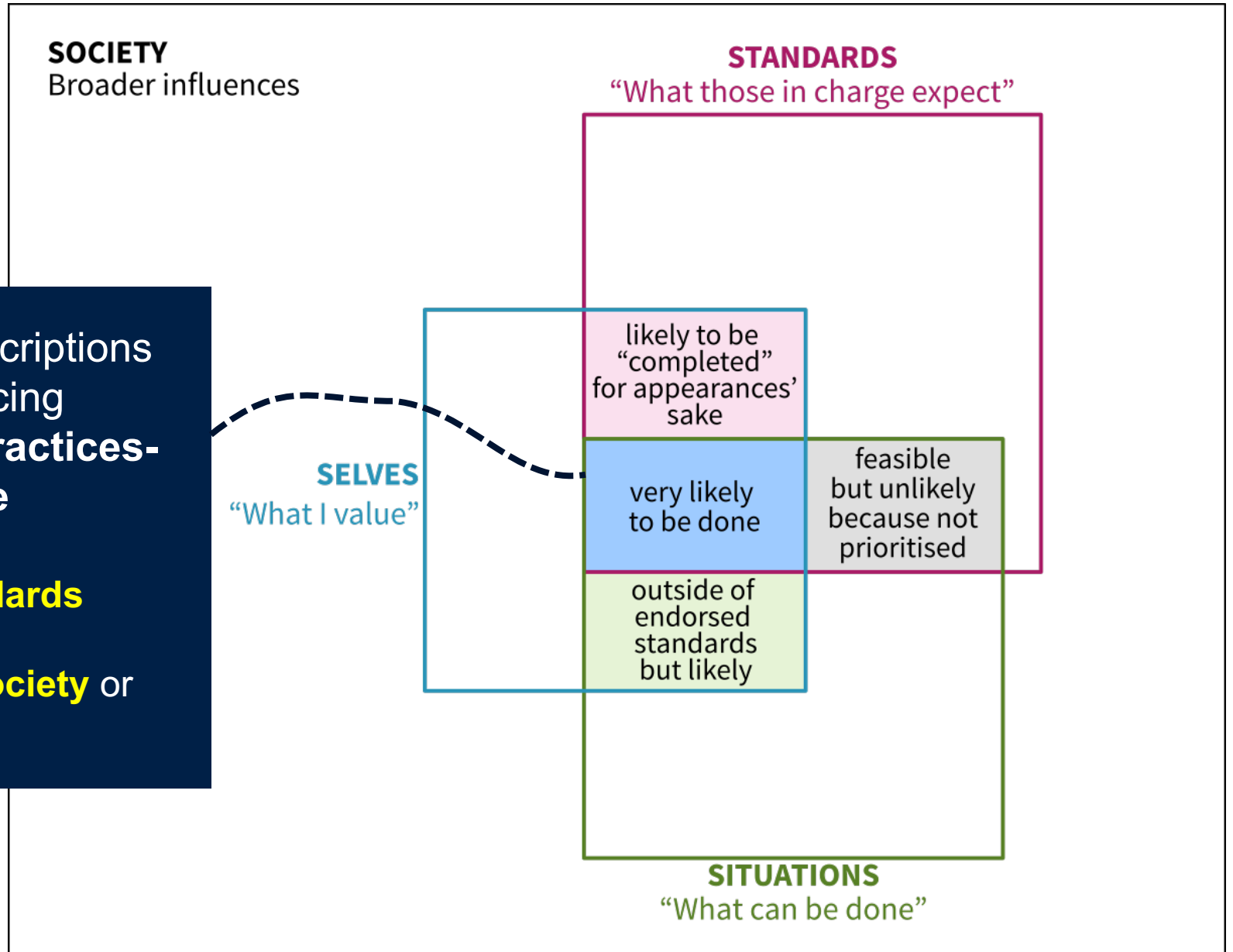
e.g.

- selves-personal satisfaction
- standards-informal

Testing the hypothesis (i): observations from the second round of coding for norms in the ‘very likely to be done’ category

Interlocutors’ descriptions of factors influencing norms that are **practices-likely to be done**

- all involve **standards**
- all involve either **situations** or **society** or both



Related ***Norms-content*** *codes*:

- curricular completion, exam prep
- reporting, assessment, data collection
- instructional routines
- long hours, financial contributions
- community duties
- collaboration, mentoring, collegiality
- responsiveness, reflection
- not otherwise classified

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Testing the hypothesis (ii): Searching the literature for empirical examples that can clarify, saturate, disconfirm (*in the spirit of theoretical sampling*)

Scopus search:
'teacher' (title), 'ethnograph*' (title/abstract/keywords),
LMICs (author affiliation), English (publication language)

179 papers

Reading abstracts:
initial exclusions based on topic and method; removing duplicates; etc

49 papers

Initial reading of the papers:
further exclusion of papers that do not discuss
perceived dominant practices and priorities (i.e., norms)

31 papers

Final reading of the papers:
analysis of types of norms and the factors supporting those norms

11 papers

Study	Country	Very likely to be done	Selves		Situations		Standards		Society	
Cliggett & Wyssmann (2009)	Zambia	small-scale farming to supplement inadequate and irregular government teaching income; pursuing additional qualifications to climb the salary scale	✓	×	✓		✓	×	✓	
Long & Wong (2012)	China	adherence to the typical, highly demanding schedule of the residential school, despite recent trauma from a devastating earthquake	✓	×	✓	×	✓		✓	
Yan & He (2012)	China	traditional, teacher-centred, assessment-oriented teaching of English (rather than the inquiry-based, collaborative approaches promoted by the curriculum reform)	✓	×	✓		✓	×	✓	
Fang & Garland (2014)	China	partial incorporation of some principles of the communicative language teaching reform (alongside the long-established countervailing practice of English teaching oriented toward exam preparation)	✓	×	✓	×	✓	×		×
Oswald (2014)	South Africa	blame games and disinclination to attempt risky collective improvements related to inclusive education	✓		✓			×	✓	
Zhang et al. (2018)	China	within this school's English department, established practice of peer collaboration to plan lessons that balance exam-oriented linguistic demands and practical communicative skills	✓		✓		✓			
Liao (2019)	China	commuting between the rural school on weekdays and urban home on weekends, with grandparents providing childcare during the week	✓	×	✓		✓		✓	
Chandran (2020)	India	extensive administrative paperwork, including new documentation required under a child-centred assessment reform	✓	×	✓		✓			
Liu & Wang (2020)	China	classroom lessons that prepare students with the formal linguistic knowledge tested in exams	✓	×	✓		✓	×	✓	
Ávila-Meléndez et al. (2022)	Mexico	partial adoption of recommended pedagogical innovations	✓		✓		✓	×	✓	
Boer & Asino (2022)	Namibia	creating printed learning materials for parents to collect during COVID-19 school closures; communicating with parents via WhatsApp	✓		✓		✓		✓	

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Oswald (2014)	South Africa	blame games and disinclination to attempt risky collective improvements related to inclusive education	✓		✓			×	✓	
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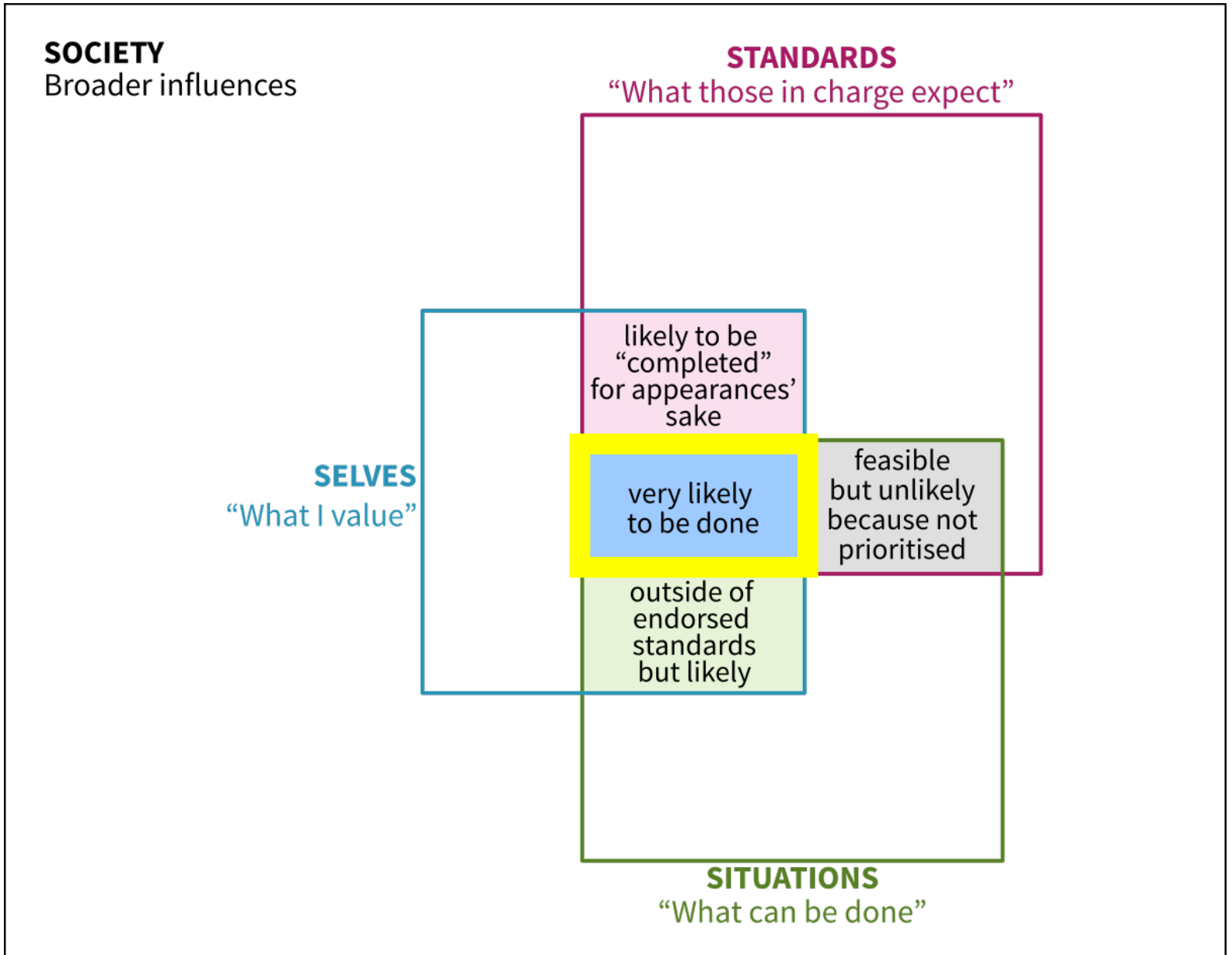
Liu & Wang (2020)	China	classroom lessons that prepare students with the formal linguistic knowledge tested in exams	✓	×	✓		✓	×	✓	
Ávila-Meléndez et al. (2022)	Mexico	partial adoption of recommended pedagogical innovations	✓		✓		✓	×	✓	
Boer & Asino (2022)	Namibia	creating printed learning materials for parents to collect during COVID-19 school closures; communicating with parents via WhatsApp	✓		✓		✓		✓	

Testing the hypothesis (ii): practices/priorities seen as **very likely to be done** are supported by selves, situations, standards



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Oswald (2014)	South Africa	blame games and disinclination to attempt risky collective improvements related to inclusive education	✓		✓			×	✓	
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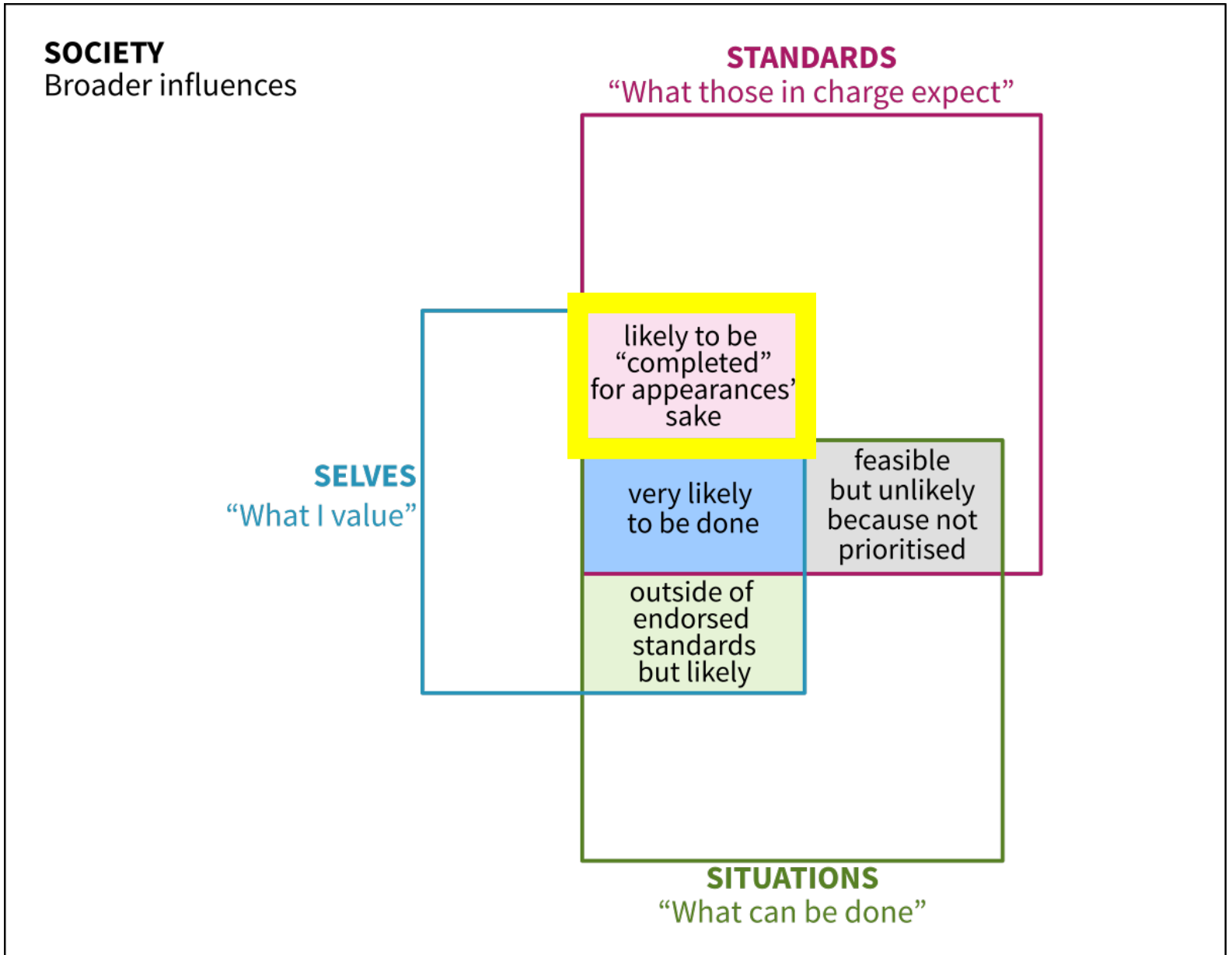
Boer & Asino (2022)	Namibia	creating printed learning materials for parents to collect during COVID-19 school closures; communicating with parents via WhatsApp	✓		✓		✓		✓	

Testing the hypothesis (ii): practices/priorities seen as **likely to be done superficially** are supported by selves & standards but not situations



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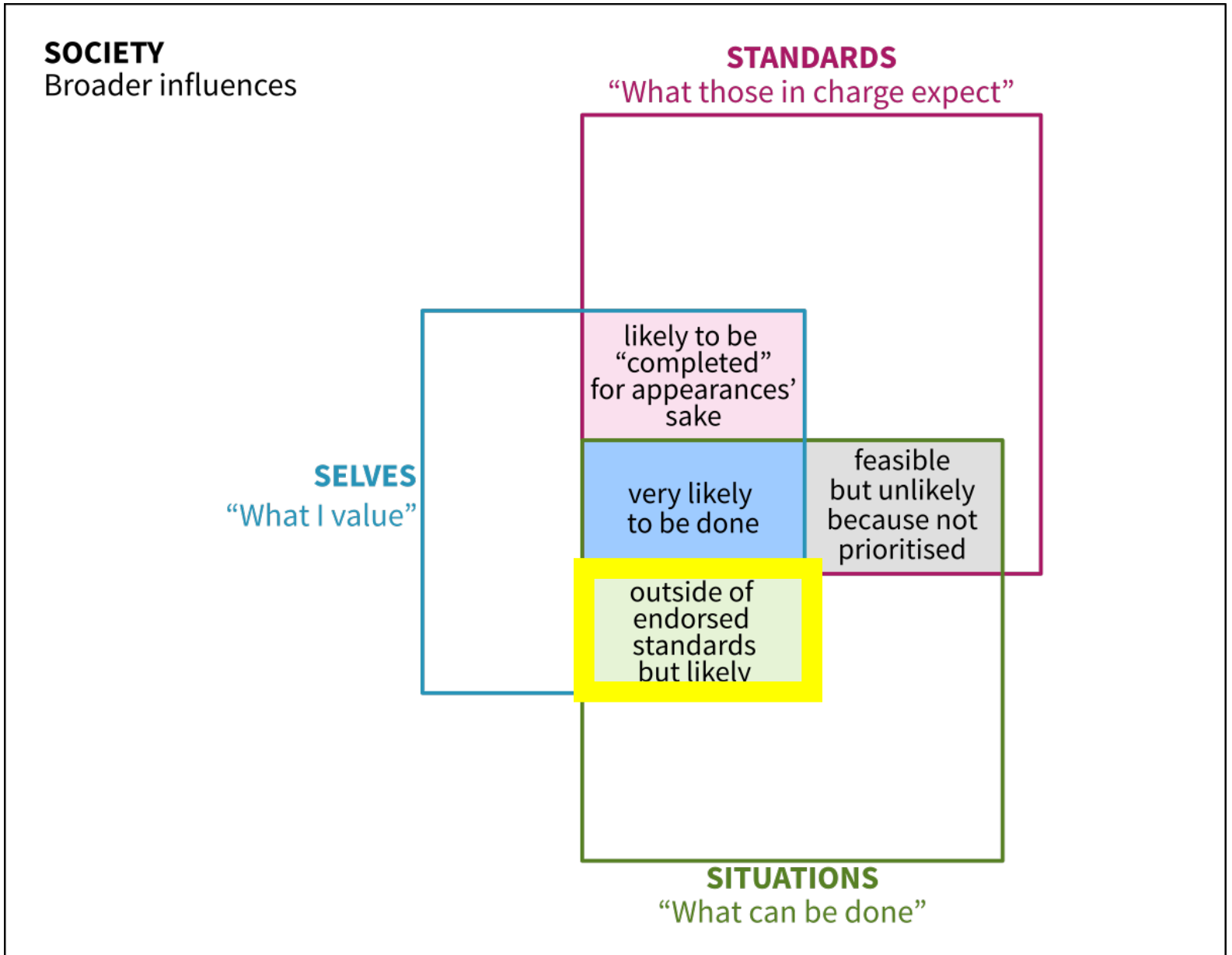
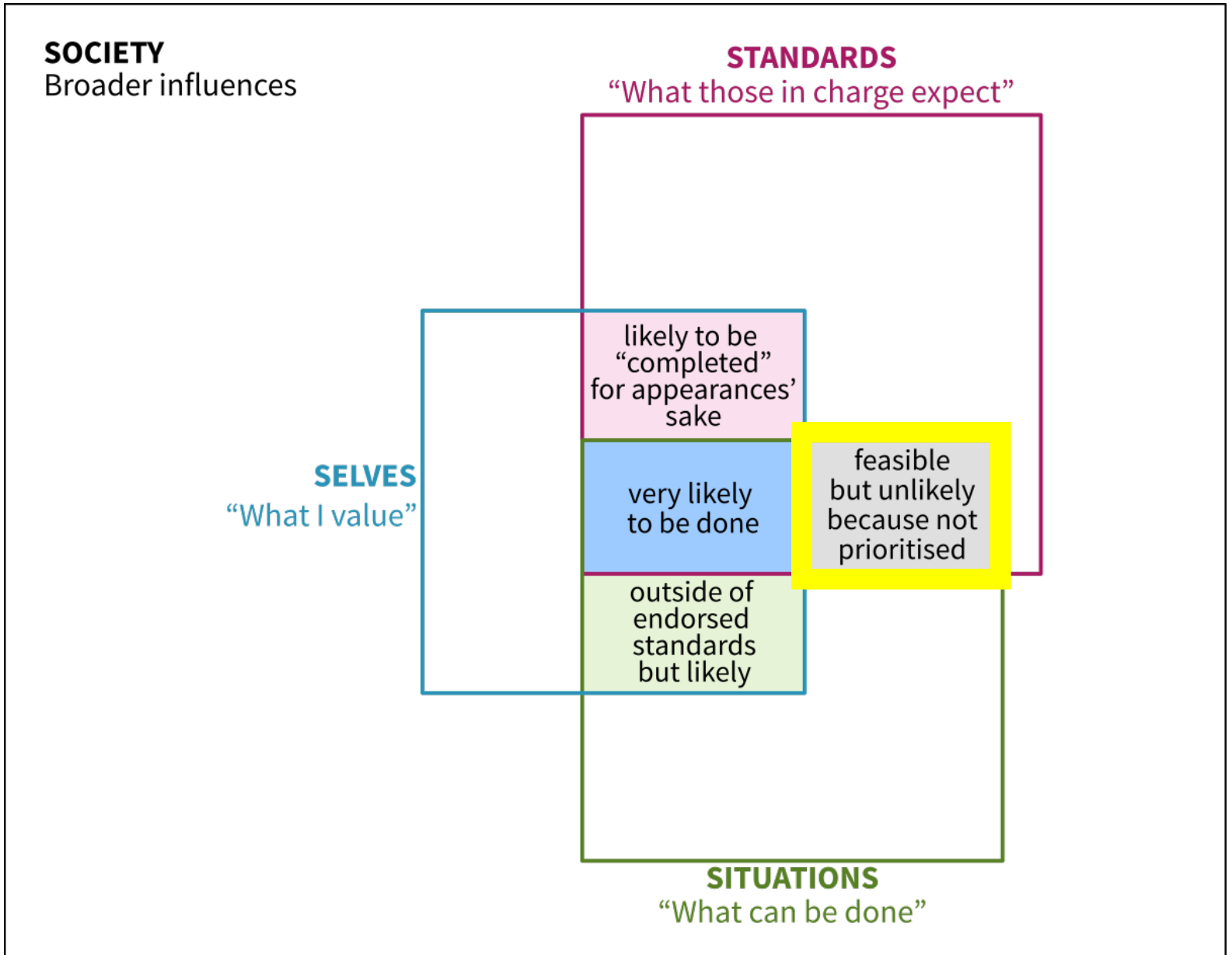
Study	Country	Likely to be done superficially	Selves		Situations		Standards		Society	
Yan & He (2012)	China	participatory listening and speaking activities *(when conducted, these activities tended to follow assessment formats and/or to involve little active input from students)*	✓	×		×	✓	×		×
Liao (2019)	China	maintaining a long-term commitment to teaching in impoverished rural regions *(many teachers commit for long enough to gain tenure, then seek transfers or apply to graduate school)*	✓	×		×	✓			
Chandran (2020)	India	meeting students' academic and socioemotional needs *(teachers wanted to do this but felt they had no time to do so adequately)*	✓			×	✓			
Boer & Asino (2022)	Namibia	creating Google/Edmodo learning materials *(a few teachers did this initially, but stopped because most students couldn't access the materials)*	✓	×		×	✓			×

Testing the hypothesis (ii): practices/priorities seen as **outside of endorsed standards but likely to be done** are supported by selves & situations



Study	Country	Outside of endorsed standards but likely	Selves		Situations		Standards	Society	
Cliggett & Wyssmann (2009)	Zambia	other income diversification strategies such as moonlighting as tutors, selling printed references on coursework not covered in class, informal retail trade or service provision; teacher strikes	✓	×	✓		×	✓	×
Yan & He (2012)	China	extra lessons during evenings and holidays	✓		✓		×	✓	
Ávila-Meléndez et al. (2022)	Mexico	union-led action against education reform, including refusal to participate in teacher evaluation	✓		✓		✓ ×	✓	

Testing the hypothesis (ii): practices/priorities seen as **feasible but unlikely** are supported by situations & standards but not selves



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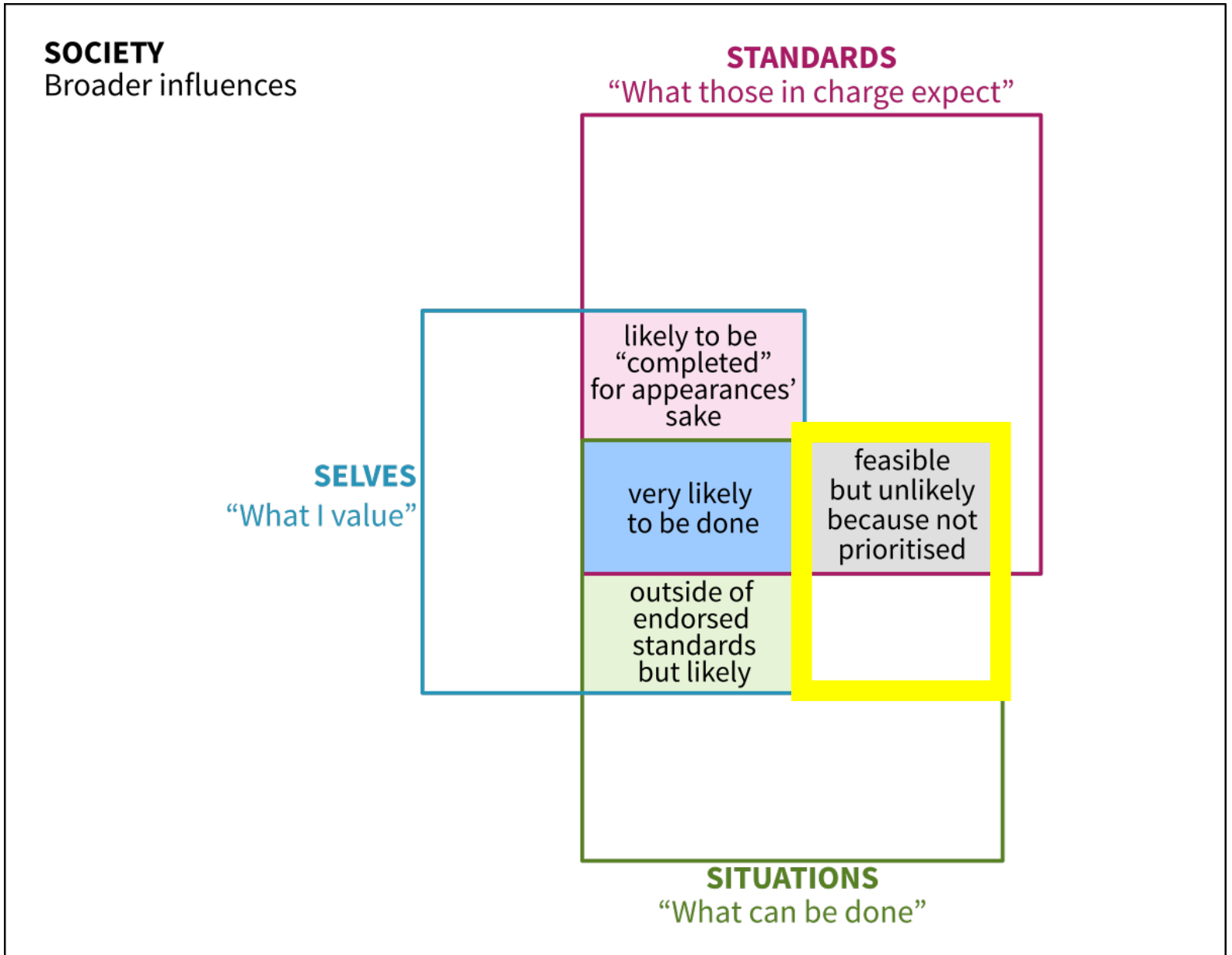
Study	Country	**Feasible but unlikely** *(i.e., the norm is that these practices are not dominant)*	Selves		Situations		Standards		Society	
Yan & He (2012)	China	paying attention to students who are less academically prepared/academically inclined *(instead, teachers typically neglected these students unless they disrupted lessons oriented toward their more exam-ready classmates)*	✓	×	✓	×	(✓)	×		×
Oswald (2014)	South Africa	*for positive deviants*: taking on informal leadership positions to try to drive schoolwide change	✓	×	✓	×	✓	×	✓	×
Zhang et al. (2018)	China	caring, equal interpersonal relationships between colleagues *(interactions tend to be cordial but shallow, partly because of department head's leadership style)*	✓	×	✓	×		×	✓	
Liu & Wang (2020)	China	classroom lessons that equip students with practical communicative English language skills *(done in demonstration classes, but not in regular classes)*	✓	×	✓		✓	×		
Boer & Asino (2022)	Namibia	marking the homework that students submitted *(some teachers feared COVID infection via submitted worksheets)*	✓	×	✓	×	✓			×

Testing the hypothesis (ii): possible modification to the category of practices/priorities seen as **feasible but unlikely**



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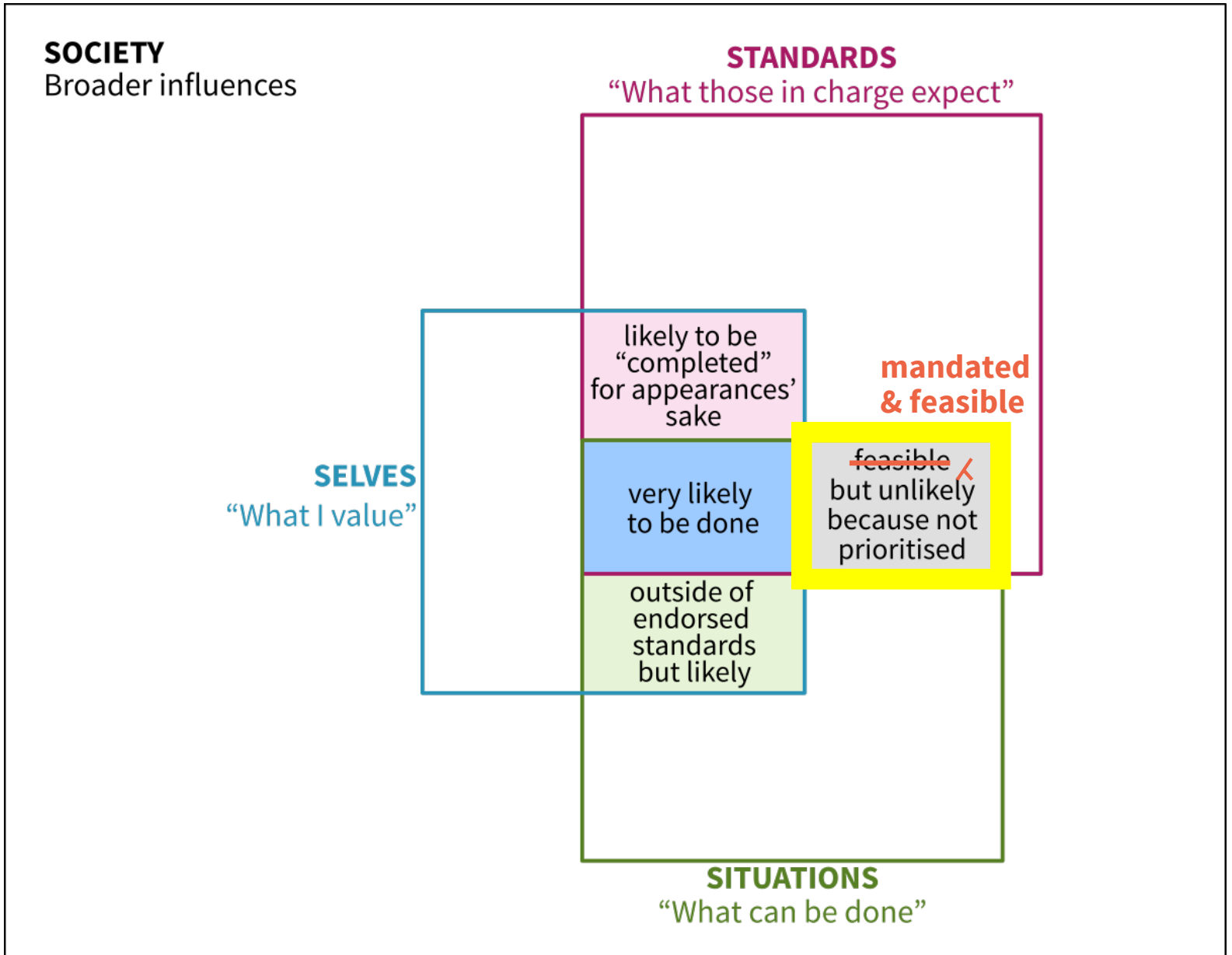
Testing the hypothesis (ii): possible (tautological?) modification to the category of practices/priorities seen as **feasible but unlikely**



Open question #1: Besides the degree of overlap/support/alignment/redundancy/etc, does the degree of **clarity** also affect the dominance of norms?

Theoretical arguments for the importance of clarity include:

Public policy:
March & Olsen (2008)
on the logic of appropriateness vs. the logic of consequentiality

"A more promising route may be to differentiate logics of action in terms of their prescriptive clarity and hypothesize that **a clear logic will dominate a less clear logic**." (p. 703)

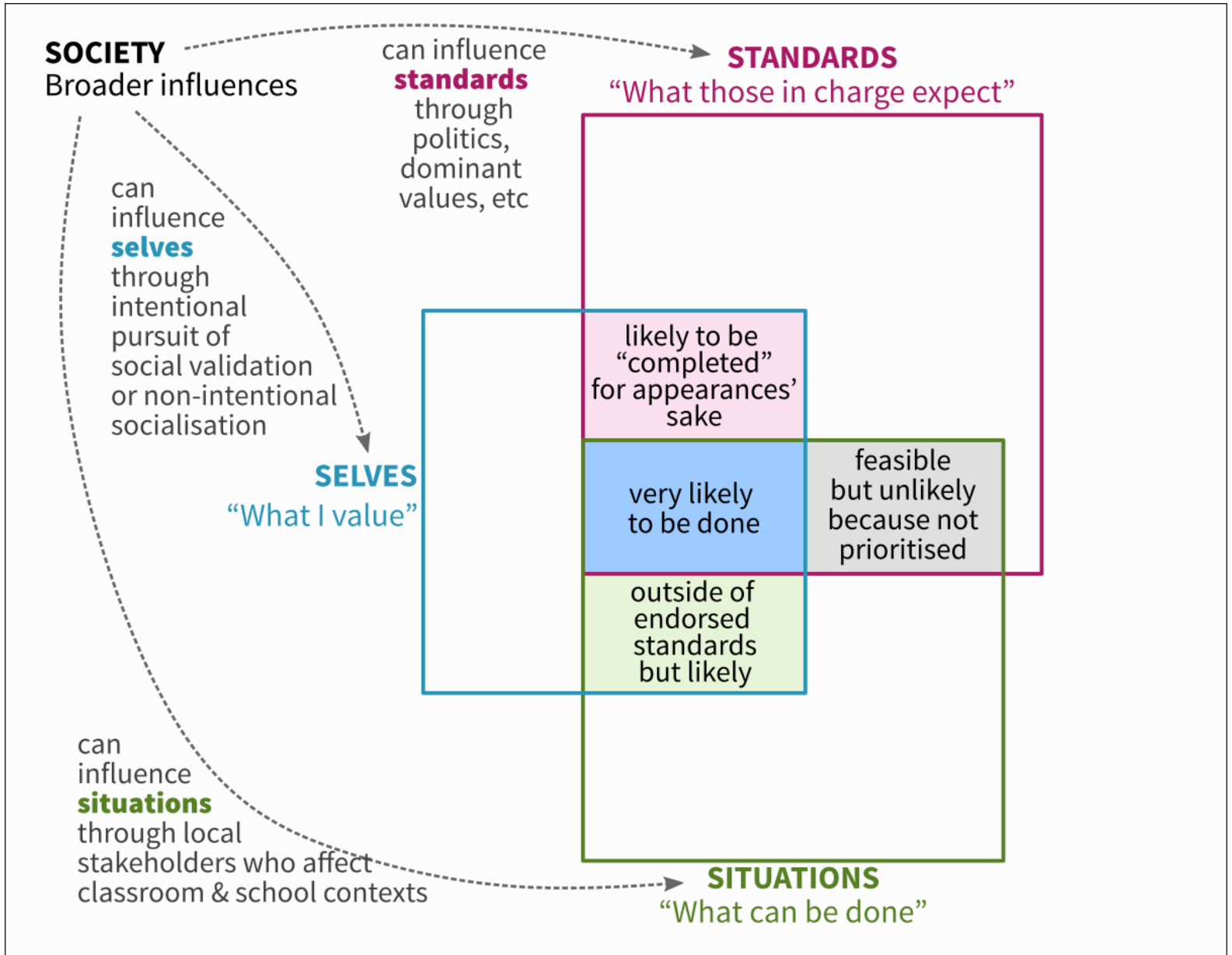
Economics:
Gibbons & Henderson (2012) *on relational contracts*

"… effective relational contracts must solve the twin problems of credibility and clarity … **clarity may take time to develop and may interact with credibility in complex ways** so that relational contracts may often be difficult to build." (p. 1350)

Management/Psychology:
Vroom (1964)
on valence, expectancy, and instrumentality in motivation

"… it seems clear that [an individual's] **behavior is affected** not only by his preference between these outcomes but **also by the degree to which he believes these outcomes to be probable**." (p. 17)

Open question #2: Is this the right way to conceptualise broader societal influences?



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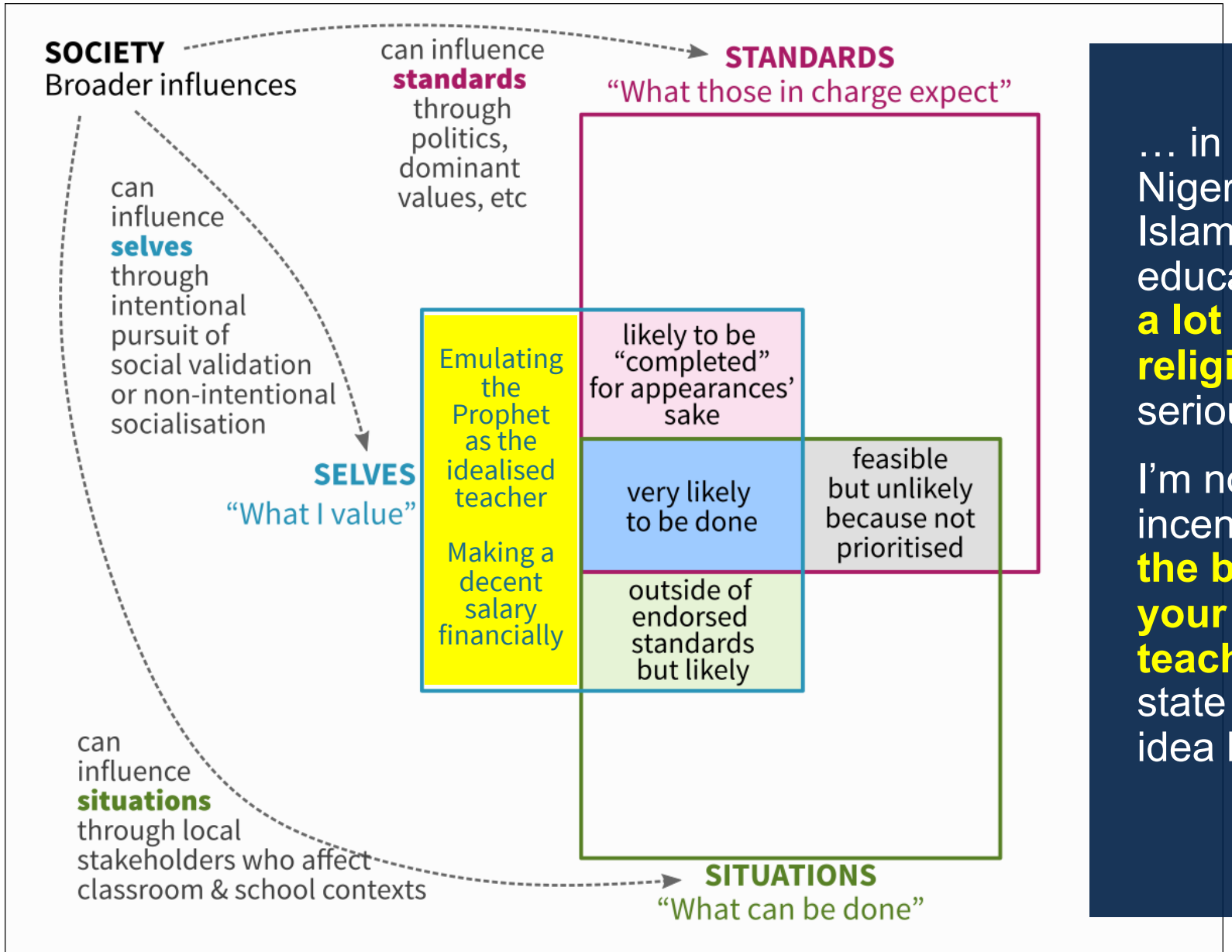


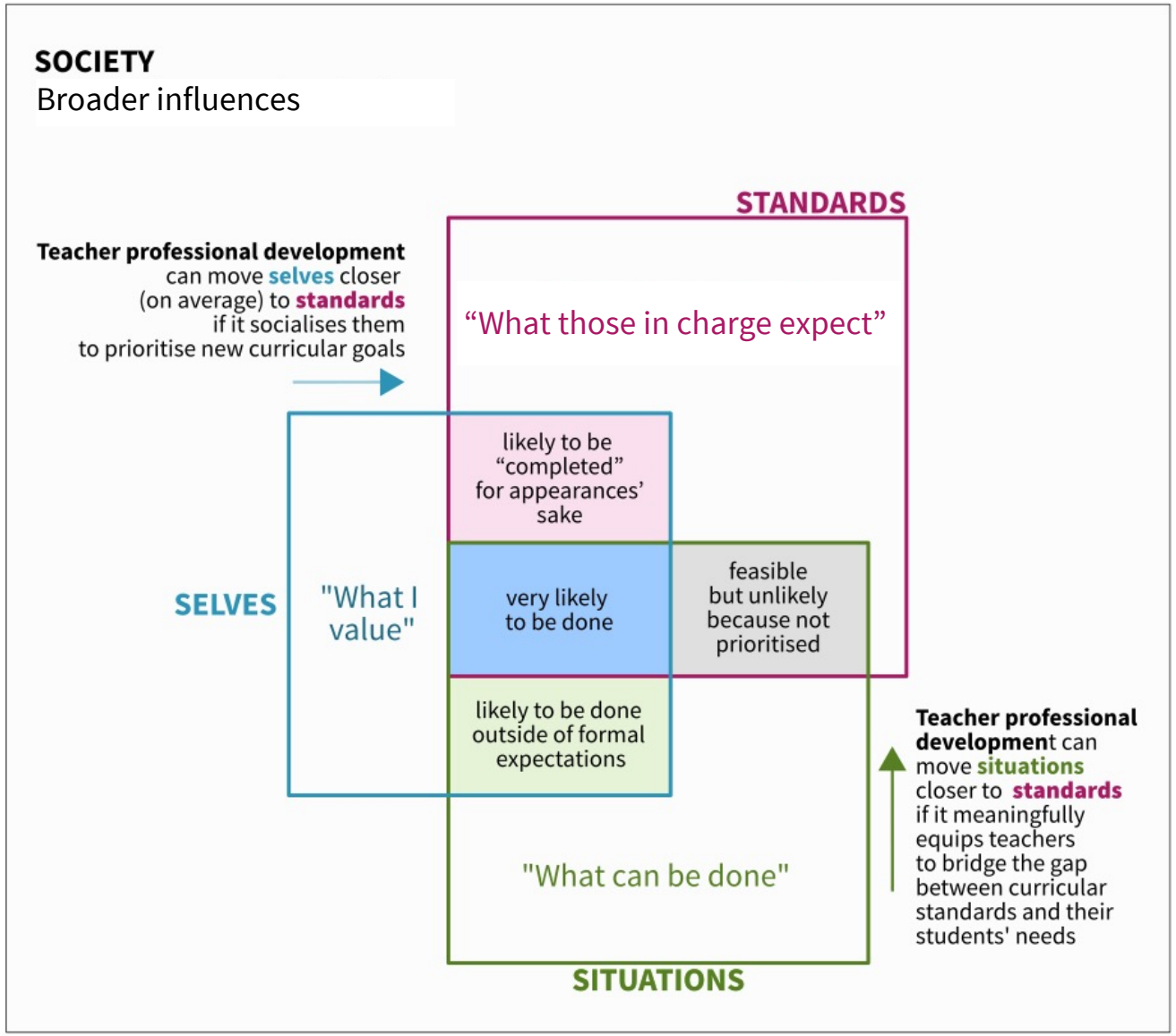
… in a lot of Islamiyya schools in the Nigerian context, which aren't just Islamic schools but do modern education as well, **you can mobilise a lot of volunteer teachers through religious norms**. And they work very seriously and do very good work.

I'm not trying to undermine financial incentives, but all I'm saying is that **the balance of the two can enhance your ability to mobilise many more teachers in these countries**. But the state and donors just don't have any idea how to do it.

—Masooda Bano

Takeaway #1: Complementarity between bird's eye view (*left*) and a teacher's perspective (*right*) in systems thinking for education

Five features of each relationship of accountability (Principal [P] to Agent [A])	Principal-agent relationships			
	Politics: Citizens and the highest executive, legislative, and fiduciary authorities of the state	**Compact:** Highest executive, legislative, and fiduciary authorities of the State to education authority	**Management:** Education authorities and frontline providers (schools, school leaders, and teachers)	**Voice & Choice:** Service recipients (parents/children) and providers of service (schools, school leaders, teachers)
Delegation: What the principal wants the agent to do.				
Finance: The resources the principal has allocated to the agent to achieve assigned task.				
Information: How the principal assesses the agent's performance				
Support: Preparation and assistance that the principal provides to the agent to complete the task.			e.g., Teacher training as part of new curriculum or pedagogical approach	
Motivation: How the principal motivates the agent, including the ways in which agent's welfare is contingent on their performance against objectives.				
Performance of agent is the endogenous, or organic, outcome of the interactions between the actors in the system. The interaction between the actors in the system are characterised by the design elements of the relationships. Systems deliver learning when strong relationships of accountability align across design elements around learning objectives				



Source: Table 5 in Spivack (2021), adapted from Pritchett (2015)

Takeaway #2: Preliminary practical implications: intervene across domains …

So if we want to change things over time—not just for some short-run quick fix—it means reshaping the systems that are around these people, drawing in good, motivated people, giving them the support they need to succeed, and then also holding them accountable for delivering in response to that support.

It's all of these pieces together. Any intervention that does just one of these is likely going to be short-sighted.

—David K. Evans

Takeaway #2: Preliminary practical implications: intervene across domains …
… but everything in moderation?

So if we want to change things over time—not just for some short-run quick fix—it means reshaping the systems that are around these people, drawing in good, motivated people, giving them the support they need to succeed, and then also holding them accountable for delivering in response to that support.

It's all of these pieces together. Any intervention that does just one of these is likely going to be short-sighted.

—David K. Evans

The typical "how" recommendation … is that we need to grapple with recruitment, deployment, professional development, incentives—basically, everything. "Do it all at once. And oh, by the way, while you're doing it, you've got to reorient the curriculum as well as the pedagogy related to the curriculum." …

But then we know of so many other instances where that has been tried, and it hasn't worked. Digging into why these big reforms didn't work should surely offer **a cautionary tale that says, "Let's not try to do all of it at once."**

—Laura Savage

Takeaway #3: Open-ended conversations can be fascinating!
Many thanks to these interlocutors for sharing their insights ☺

- **Verónica Cabezas**, Pontificia Universidad Católica de Chile/ Elige Educar
- **Jessica Holloway**, Australian Catholic University
- **Joan DeJaeghere**, University of Minnesota
- **Shwetlena Sabarwal**, World Bank
- **Dan Honig**, University College London
- **Sharath Jeevan**, STiR Education/Intrinsic Labs
- **Margarita Gómez**, University of Oxford
- **Wendy Kopp**, Teach For All
- **Lucy Crehan**, author of *Cleverlands*
- **Katlego Sengadi**, Youth Impact
- **Belay Hagos Hailu**, Addis Ababa University
- **Shintia Revina**, SMERU Research Institute
- **Yamini Aiyar**, Centre for Policy Research
- **Soufia Anis Siddiqi**, LUMS
- **Masooda Bano**, Oxford University
- **Ying-yi Hong**, Chinese University of Hong Kong
- **Melanie Ehren**, Vrije Universiteit Amsterdam
- **Michael Woolcock**, Harvard University/World Bank
- **David K. Evans**, Center for Global Development
- **Maria Teresa Tatto**, Arizona State University
- **Kwame Akyeampong**, Open University
- **Luis Crouch**, RTI International
- **Juliet Wajega**, Hivos (formerly at Uganda National Teacher's Union)
- **Barbara Tournier**, IIEP-Unesco
- **Alice Cornish**, Better Purpose
- **Mike Hobbiss**, University College London/secondary school teacher
- **Laura Savage**, IEFG
- **Carlos Vargas Tamez**, UNESCO

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