# Educational Accountability or Social Accountability in Education? Similarities, Tensions, and Differences

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Aprendizajes

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*Cover Photo Caption and Credit:* Children in Mali starting the school year. Photo: Beekungo, 2017

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Children in Aurangabad, India, in educational interventions. Photo: PAL photo bank

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## Acknowledgements

# Summary
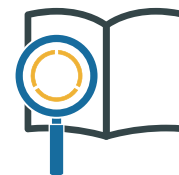
This article addresses the relationship between the concepts of Social Accountability and Educational Accountability. The analysis of the similarities, differences and tensions between these two different concepts can strengthen citizen participation for educational improvement by identifying the full range of actors and processes in decision making that influence the success or failure of educational policy beyond of the teachers.

We encounter two distinctive features involving social accountability mechanisms in the field of education: (1) There are many actors who participate in education, making it difficult to identify precisely who is responsible for key decisions, and (2) In education policy one encounters the concept of educational accountability, which refers to a series of mechanisms to hold schools and teachers accountable for educational outcomes by adopting standardized tests on a widespread basis to motivate change and steady improvement. Are the approaches of social accountability and educational accountability compatible? What are their differences and similarities? What are the effects of these differences when it comes to formulating solutions to the crisis in education?

Through a comparative analysis, and looking at the Mexican case in depth, it becomes clear that we have to examine more than the tip of the iceberg. The educational accountability perspective is insufficient and at times counterproductive for educational improvement because it has a series of biases that are centered on the symptoms more than the causes of the structural problems related to low education levels. These biases include (1) Reducing the criteria for assessing the success of education policies to the outcomes of standardized tests, (2) Identifying teachers as the main actors responsible for educational outcomes, without considering other associated factors, such as student characteristics and socio-economic factors, (3) The concentration of negative consequences in the last chain of interaction—teachers and schools—which disproportionately affects students and teachers, and (4) Difficulties in mobilizing citizens around the demand for a better education. The school and the teachers are the main providers of educational services, but their performance is not the only cause of educational outcomes.

This is why we need to construct an expanded vision of social accountability in education, based on a human rights perspective all of the actors assume our responsibility inside and outside the schools, to facilitate: (1) The generation of broad and fair criteria of success for evaluating education policy, using various evaluation methodologies and the results to generate formative feedback; (2) To better identify those responsible and their responsibilities, focusing on those factors that improve equity and quality, increase students' motivation to learn, reduce the burden of the socio-economic inequalities, and help produce more supportive schools and teachers, and (3) The involvement of citizens to achieve better learning, build relationships based on mutual trust, and complement access to local information with policy monitoring throughout the chain of decision-making.

Children in Naolinco, Mexico at school. Photo: MIA photobank

# I.  Introduction

According to the Institute of Statistics of the United Nations Educational, Scientific and Cultural Organization (UNESCO), 6 of every 10 children and adolescents in the world, i.e. nearly 617 million persons, are unable to read a simple sentence or perform a basic mathematical calculation (UNESCO 2018c). Of these, nearly one-third are not in school (approximately 263 million persons), but two-thirds are not learning the minimum needed to advance their education even though they are going to school (UNESCO 2018b). Hence there is ever more talk of a *global learning crisis* that costs governments millions of dollars a year and of the need to focus efforts so that education is a response, and not merely a good wish, for the collective and individual development of every human being (UNESCO 2016; World Bank 2018).

The international lending agencies, multilateral organizations, and other global actors, seeking to tackle this learning crisis, have been adapting and incorporating into their discourse the need to implement, among other measures, policies for participation and accountability to understand the magnitude of the problem, as well as to seek and develop joint solutions. As has occurred with other social policies, such as health and poverty reduction, international agencies propose strengthening "social accountability," that is, citizen participation in overseeing and monitoring the delivery of public services as an effective way to improve the governance of those policies, while also improving access and quality.[1]

Recent examples of this interest in incorporating participation and accountability to tackle the education crisis are the "Global Education Monitoring Report 2017/2018," produced by UNESCO (2017), and the "World Bank Development Report 2018," dedicated to making the promise of education a reality (World Bank 2018). Similarly, international coalitions and organizations have been drawn to such an approach, including the Global Partnership for Social Accountability, the Global Partnership for Education, international development agencies from the United Kingdom and the United States, specialized agencies of UNESCO, such

as the International Institute for Educational Planning (IIEP), and donor organizations, such as the Hewlett Foundation, that have contributed to improving the quality of educational services through citizen participation and accountability.[2]

This global interest has seen local responses. We, the authors of this document, coordinate a project called "Independent Measurement of Learning" (in Spanish, "Medición Independiente de Aprendizajes" (MIA)), whose mission is to improve education and basic learning in children and adolescents in Mexico through innovation, collaborative work, and citizen participation. Since 2014 we have been performing citizen-led assessments (CLA), for which we have trained more than 2,500 volunteers who assess children and adolescents' literacy and math skills. We have also implemented several extra-school educational interventions to improve skills (Hevia and Vergara-Lope 2016; Vergara-Lope and Hevia 2016). Along with teams from 14 countries of the global South, including India, Pakistan, Nepal, Bangladesh, Senegal, Mali, Nigeria, Cameroon, Kenya, Uganda, Tanzania, Mozambique, Mexico, and Nicaragua, we came together in the People's Action for Learning Network (PAL Network), interested in bringing children's learning to the center of education policies and practices through citizen participation in assessing and improving the learning of all children, evaluating millions of children in their homes with the participation of hundreds of thousands of volunteers (PAL 2018).

Designing and implementing actions for participation and accountability in the field of education is complex for several reasons. Some are common to other fields of social policy, such as the need to have a network of partners that makes it possible to undertake oversight and monitoring actions, and state agencies with minimum capacities to act so as to be able to engage with society, address claims, and implement collective decisions.[3] Yet there are at least two factors specific to the field of education that must be considered in order to implement actions for participation and accountability.

Volunteer applying reading tests in Bihar, India, 2013. Photo: PAL photo bank

The first has to do with the multiplicity of actors and processes that come into play in teaching and learning processes. Let us imagine an 11-year-old girl who is going to the public school in her rural community, which has only one teacher for the primary school. She can read individual words, but not a complete sentence. Who is responsible for this state of affairs? Is it the teacher? The parents? The child? The municipal authorities? The education ministry? All the above? As the Global Education Monitoring Report concludes, assigning persons responsible and responsibilities in education is neither easy nor simple (UNESCO 2017).

The second complexity particular to the field of education is the existence of the concept of "educational accountability" which has been used in education research for decades and attempts to hold schools accountable for educational outcomes and motivate improvement using standardized testing. Several educational reforms in countries of the global South have involved implementing standardized evaluations of educational attainment and publishing test results.[4] These reforms have incited strong critiques and resistance by actors who see educational accountability as having negative effects on education systems.[5]

Accordingly, we posit, as a research problem, that there is lack of knowledge about the relationship between the concepts of social accountability and educational accountability. We ask: What are their differences and similarities? Are the approaches of social accountability and educational accountability compatible? What are the effects of these differences when it comes to designing solutions to the education crisis? Hence, the objective of this paper is to analyze and discuss the relationship between the concepts of social accountability and educational accountability.

To begin to answer these questions, we constructed typologies (López Roldán 1996) in order to characterize the concepts of social accountability and educational accountability, drawing on bibliographical references. Second, focusing on the Mexican case but drawing on international examples from the global South, we use the comparative method (Collier 1993), seeking to compare these types in the four basic dimensions of accountability processes: (1) defining criteria for success of education policy and the construction of monitoring indicators; (2) identifying persons responsible and responsibilities; (3) generating consequences for the actors/persons responsible; and (4) level of participation of the different actors involved.

The main result of the comparison shows that educational accountability has a series of biases that focus more on the symptoms than on the causes of the structural problems related to low educational levels. These biases include: 1) Reducing the criteria for assessing the success of education policies to the outcomes of standardized tests, 2) Identifying teachers as the main actors responsible for educational outcomes, without considering other associated factors, such as student characteristics and socio-economic factors, 3) The concentration of negative consequences in the last chain of interaction— teachers and schools—which disproportionately affects students and teachers, and 4) Difficulties in mobilizing citizens around the demand for a better education.

The paper is organized in four sections. The first presents the policy context of major debates in education to situate the discussions of social accountability and educational accountability. The second analyzes the concepts in question. The third section explains the similarities and differences of the four dimensions analyzed. And the fourth presents a proposal for social accountability *in* education in order to overcome the biases identified, as well as a series of challenges for public servants, nongovernmental organizations, and academics interested in promoting accountability and educational improvement.

# II. The Context

A ctions to strengthen accountability in education have not emerged in a vacuum. There are at least four major tensions in the field of education that make it possible to explain some divergences between the concepts that we wish to point out.

The first major tension has to do with the expansion of neoliberal proposals for education (Ball 2013; Grugel and Riggirozzi 2018) and the dispute over whether education should be considered a right or a service/product (Lázaro 2013). One fundamental area of contention has to do with the meanings and uses of the accountability mechanisms that are developed. As we will see in greater detail in the following sections, these clashing proposals promote different conceptions of accountability in education, giving rise to a sort of "perverse confluence," using Dagnino's classic definition (2006).

In effect, during the 20th century a major social consensus emerged that sought to strengthen the idea of education as a social right, both within the nation-states and in international organizations (Rioux and Pinto 2010). Accordingly, in the early 20th century, ministries of education were established in several countries, including Mexico (Solana, Cardiel, and Bolaños 1981); the right to education as a constitutional guarantee was recognized; and the United Nations Educational, Scientific and Cultural Organization (UNESCO) was founded (in 1946). Based on this human rights agenda, and upholding the right to education and its role in enabling other rights, an architecture for the promotion and defense of the right to education has been constructed using several mechanisms, including the special reports of the United Nations High Commissioner for Human Rights on the right to education (OHCHR 2019), as well as the participation of governmental and nongovernmental organizations in the international discussions on the 2030 agenda and the sustainable development goals (UNESCO 2016).

Nonetheless, at the turn of the century, with the strengthening of the neoliberal model, education became one more area in which markets could be developed (Harvey 2013). Education became a service that could be provided by both state agents and commercial agents. This debate frames the discussion on the effectiveness of charter schools and the effects of the No Child Left Behind Act (NCLB) in the United States, or social demands to "stop the profit" ("*alto al lucro*") in Chile that sparked massive demonstrations in recent years.[6] Accordingly, to speak of the responsibility of state actors to provide educational services is to enter disputed terrain with the emergenc of neoliberal measures in education (Clarke 2012), including aggressive policies to privatize education in developed countries (Hursh 2015) and in the global South (Ball 2012), not to mention the constant political pressure for competition among economies (Cohen, Spillane, and Peurach 2018). As we review in depth in section 4 of this paper, the umbrella of social responsibility in relation to educational outcomes is often used as an argument to promote greater competition within the education system, and for private operators to have greater participation in the provision of educational services, understood from the perspective of markets (Ball 2013). Similarly, neoliberal policies are accompanied by a structure of economic interests linked to developing and providing advisory services on evaluation systems, on different scales, which become important interest groups for whom producing evaluations and holding the teachers and the schools accountable for the outcomes is an important part of their strategy for expanding (Mullen 2017).[7] So there is a corporate sector with growing interest and power to guide privatizing educational reforms, whose arguments regularly feature the outcomes of standardized tests and the need for pro-market educational reforms (Fontdevila, Verger, and Avelar 2019; Verger, Altinyelken, and Novelli 2018).

The second tension is the pressure to which the school itself is subjected as an institution. Increasingly doubt is cast on the relevance of the school and its practices for acquiring the learning one needs nowadays; and questions are raised concerning the school's difficulties adapting to technological changes, and the incompetence of the school system administrators (Fullan 2007;

Noro 2010). The school appears to be an institution in crisis that requires urgent changes if it is to avoid becoming irrelevant. Yet at the same time education, and with it the school as its institution par excellence, takes on ever more importance in what has come to be called the knowledge society (Castells 2004), and hence its prominent role in determining countries' economic growth (Hanushek and WöBmann 2007). So, there are demands of business sectors to have an education system (and therefore schools) that increase countries' competitiveness (Molina, Amate, and Guarnido 2011). And these demands pose more questions than answers as to the type of school needed today.

The third trend, which we analyze in the next section in detail, is the growing use of evaluation and measurement as a step considered essential for improving education amidst growing critiques of their usefulness and effects on education. In effect, the use of large-scale tests such as the Programme for International Student Assessment (PISA) and the Trends in International Mathematics and Science Study (TIMSS) has grown exponentially in the countries, but criticisms of these measurements are ever more common, going both to their methodology (Kreiner and Christensen 2014) and to the general use of these instruments to "improve education," including the so-called PISA effect on the governance of educational systems (Grek 2009).[8] It is in this context that the limitations of educational accountability and its promises of improving education in the global South become apparent. And it is these results that are being used more commonly by various corporate actors and international agencies in the debate on privatizing education and the need for new governance (Grimaldi 2012).

Finally, the fourth trend has to do with the growing importance of social accountability, transparency, access to information, and citizen participation, with emphasis on national governments and extending beyond the field of education (McGee and Gaventa 2010). Some examples are the open government initiatives that incorporate educational themes (Gondol and Allen 2015), as well as initiatives of international organizations, such as the Transparency and Accountability Initiative (2014), in addition to experiences associated with fighting corruption, such as Transparency International and Global Integrity, where general accountability policies merge with education policies (Transparency International 2005).
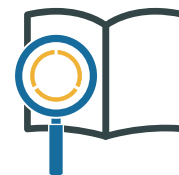
# III. The Concepts in Question

Having seen the main contextual tensions, this section briefly reviews the concepts of social accountability and educational accountability.

## Social Accountability

There are various definitions of social accountability that emphasize that it is a political concept.[9] It has been defined as the "extent and capability of citizens to hold the state accountable and make it responsive to their needs" (Grandvoinnet, Aslam, and Raha 2015:1; World Bank 2012:30–31); as "the wide range of citizen and civil society organization (CSO) actions to hold the state to account, as well as actions on the part of government, media, and other societal actors that promote or facilitate these efforts" (Malena and McNeil 2010:1); and as the capacity of citizens to demand an accounting from their governments by means that go beyond elections and bureaucratic procedures (Joshi 2008; Peruzzotti and Smulovitz 2006). Social accountability is related to concepts such as "community accountability," which defines the "ability of communities (here, primarily local communities) to hold governments, funders, bureaucracies and service providers accountable to them for the provision of services and opportunities that meet basic rights" (Westhorp et al. 2014:1-2), or as "diagonal accountability," which "represents the extent to which citizens are able to hold a government accountable outside of format political participation" (Lührmann, Marquardt, and Mechkova, 2017:15). Jonathan Fox offers a good synthesis:

> In practice, the concept includes a wide range of institutional innovations that both encourage and project voice. Insofar as social accountability builds citizen power vis-à-vis the state, it is a political process–yet it is distinct from political accountability of elected officials, where citizen voice is usually delegated to representatives in between elections. This distinction makes social accountability an especially relevant approach for societies in which representative government is weak, unresponsive, or non-existent. (Fox 2015:346)

Social accountability has been strengthened by a series of academic discussions tied to the democratic deficit, incorporating cross-cutting or hybrid ways of understanding the vertical and horizontal relationships of accountability, incorporating citizen voices, and the discussion on the quality of governments, anti-corruption strategies, and forming new social movements in authoritarian contexts, among other issues.[10] International agencies such as the United Nations Development Program (UNDP, 2013) and especially the World Bank have promoted the implementation of various social accountability mechanisms in social protection policies.[11]

Much of the literature agrees that social accountability mechanisms have become interesting arenas of experimentation and citizen innovation for improving the quality of public services.[12] Nonetheless, expectations regarding the capacity of social accountability to improve the quality of public services, especially in governments with low capacities, tend to be too high. For example, Malena and McNeil (2010:12-22) state that social accountability mechanisms can improve governance, development, and citizen empowerment. Similarly, it is said that it helps reduce corruption, improve the accountability of public officials, improve the design of public policies, increase trust in and the legitimacy of the government, and generate social cohesion, among other benefits (Grandvoinnet, Aslam, and Raha 2015:9). In addition, social accountability contributes to improve the delivery of services, the use of the budget, government accountability, capacity-building and building citizen spaces, and local empowerment (McGee and Gaventa 2011:16-18).

Evidence on outcomes leads to adjustments in these expectations. The limits have been documented by examining outcomes of several social accountability initiatives in the global South. The conclusion: access to information is not enough.[13] There is a need for various types of mechanisms interacting among themselves; the outcomes cannot be isolated from major social and economic demands of society; and the political, social, and cultural context takes on fundamental importance for analyzing success or failure in practice.[14]

According to the literature, limited outcomes with respect to expectations can be interpreted in various ways. For some this points to mistaken presumptions: It is assumed that there is an automatic relationship between more voice and greater accountability; that citizen voice represents the "people," considered homogeneous; that more efficient institutions will be more transparent and accountable; that democracy improves development and reduces poverty; that changes in society-state relationships are quick, and that the outcomes expected by donors are visible and quick (Rocha Menocal and Sharma 2008:xi). Others suggest that there is a certain lack of knowledge about decision-making processes (Ayliffe, Aslam, and Schjødt 2017) and how the different levels of decision-making interact (Fox, Aceron, and Guillán 2017:4). Authors have also analyzed the difficulty scaling up and replicating "successful" mechanisms and how these can emerge beyond micro-local levels (Fox, Aceron, and Guillán 2017; Rocha Menocal and Sharma 2008). Others have noted a theory of deficient causality between social accountability and fighting corruption (Baez-Camargo and Stahl 2016; Joshi 2013). Joshi and Houtzager (2012:154-59) also warn of the risk of depoliticization, i.e. focusing on the mechanisms and not on the political processes and how the poor make claims, and not giving adequate consideration to the political and historical context of society-state relations.

Accordingly, it is important to distinguish between "tactical" social accountability and "strategic" social accountability, and to build alliances and vertical linkages to ramp up the democratizing effect of social accountability.

> Tactical approaches are bounded interventions (also known as tools) and they are limited to "society-side" efforts to project voice. Their theory of change assumes that access to information alone will motivate localized collective action, which will in turn generate sufficient power to influence public sector performance. Strategic approaches, in contrast, deploy multiple tactics, encourage enabling environments for collective action for accountability, and coordinate citizen voice initiatives with reforms that bolster public sector responsiveness. Reinterpreting evaluation evidence through this new lens, it turns out that the results of tactical approaches are indeed mixed, whereas the evidence of impacts of strategic approaches is

much more promising. This interpretation points to the relevance of institutional change strategies that promote both "voice" and "teeth" (defined here as the state's institutional capacity to respond to citizen voice). (Fox 2015:346-47)

Accordingly, citizen actions to project voice, oversee and monitor the performance of governments, and demand information and answers, when strategically articulated, have a greater likelihood of impacting decision-making so as to improve access to and the quality of services and public policies.

From this perspective, various experiences have been analyzed systematically in the field of education. Westhorp et al. summarize part of the literature in four dimensions: (1) specific social accountability actions on educational issues, such as keeping scorecards, monitoring textbooks, and tracking teacher attendance; (2) de-centralization; (3) school-based management (SBM); and (4) community schools (Westhorp et al. 2014). Examples of the first include monitoring the policy for distributing textbooks in the Philippines (Fox, Aceron, and Guillán 2016), experiences with report cards (Joy and Moses 2016), and various participatory mechanisms to improve learning, whether with a report card or with co-produced community interventions (A. Banerjee et al. 2010).

Similarly, the field of education has been analyzed using decentralization models and following the World Bank's "short route/long route" framework (World Bank 2003). This framework distinguishes three types of actors: citizens/clients; the state, including policymakers; and service providers. The "long route" involves giving citizens voice to influence the policymakers, who in turn exercise control over the providers, whereas the "short route" implies empowering the clients to more directly control the service providers.[15] Nonetheless, as we will see in the next section, in education the concept of "accountability" is not new, and has different connotations.

## Educational Accountability

In the literature on education the idea of educational accountability has a long tradition. In England the concept of *formal school accountability* was introduced in the 1988 education reform as a mix of market mechanisms, publication of schools' outcomes (based

on standardized multiple-choice achievement tests) to help families select schools (Burgess, Wilson, and Worth 2010). In simple terms, educational accountability seeks to determine who is accountable, to whom, and for what (Darling-Hammond and Ascher 1991). Therefore, it can be defined as "an accounting to the persons interested or involved for the outcomes of the educational process, which in turn is expected to have, as a consequence, an increase in the levels at which each actor in that process is to be held accountable" (Corvalán 2006:11),[16] and has also been understood to mean "holding the schools (and their principals and staff) accountable for the outcomes attained…. The schools must take responsibility for the outcomes they produce" (McMeekin 2006:20).

The literature on this subject is vast and encompasses a wide variety of forms and types of accountability, such as performance-based accountability (Ball 2003; Falabella and de la Vega 2016), test-based accountability (Hout and Elliott 2011; Jacob 2007), and "intelligent" accountability (O'Neill 2013). Falabella y De la Vega (2016) identify diverse approaches related to the general idea of educational accountability. They identify state or *bureaucratic accountability* as one finds in France and Portugal; *performance-based accountability*, which expanded in the 1980s in countries such as New Zealand, England, Chile, and the United States; and a third approach based on *professional accountability* related to teacher-training and working conditions, in countries including Canada, Scotland, and Belgium.

The discussion of educational accountability as performance-based accountability is deeply rooted in the English-language literature, in particular in the education reforms in the United States, in the discussions both on the creation of educational quasi-markets to increase the competitiveness of schools (charter schools, vouchers, etc.) and on implementing the No Child Left Behind Act.[17]

In these contexts educational accountability systems are defined as processes that include three elements: student testing, public information about school performance, and rewards or sanctions on the basis of some measure of improvement or school performance (Kane and Staiger 2002:92)[18]; or, as Hanushek and Raymond propose: "an accountability system was defined as publishing outcome information on standardized tests for each school along with providing a way to aggregate and interpret the school performance" (Hanushek and Raymond 2004:12).

Based on the U.S. way of implementing systems of accountability in education, Fuhrman asserts that these systems are based on five major principles: (1) the most important is the student's performance, which she describes as "the key value or goal of schooling, and constructing accountability around performance focuses attention on it;" (2) performance is measured with precision and assuring the appropriateness of the evaluation tools used; (3) the consequences can motivate school staff and students; (4) the education systems should have high expectations and aspire to higher levels of performance; and (5) the undesired consequences of the accountability systems are minimal (Fuhrman 2004:8-9).

In this system standardized tests become the central mechanism for accountability systems to work, in terms of both positive rewards, such as incentives for teachers (Vegas 2005), and negative incentives, in the context of efforts to improve schools' educational levels (Fuhrman and Elmore 2004).

Finally, the effectiveness of educational accountability systems when it comes to improving educational achievement is disputed, as discussed in the following sections.
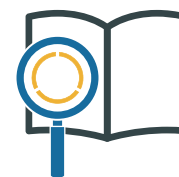
# IV. Comparing the Concepts

Having set out the concepts in question, this section presents a systematic comparison in four fundamental dimensions of accountability: How the criteria for success or failure of the public policy are construed and how monitoring indicators are constructed; persons responsible and responsibilities; adopting consequences for the persons responsible; and the level of participation of the actors involved. Table 1 summarizes the differences and similarities between educational accountability and social accountability in each of the dimensions discussed next.

**Table 1.** Differences and similarities between educational accountability and social accountability, by dimension

| | Educational accountability | Social accountability | Main similarities | Main differences |
|---|---|---|---|---|
| Generating criteria for success and monitoring indicators | Equity and inclusion: coverage, dropout rate<br><br>Educational achievement outcomes: standardized tests | Educational achievement outcomes<br><br>Equity and inclusion<br><br>Individual and collective development<br><br>Non-cognitive skills | Importance of generating outcome indicators and not only process indicators | Educational purposes associated with individual and collective development<br><br>Non-cognitive capabilities and skills |
| Identifying responsibilities and persons responsible | Persons responsible school community: teachers, principals, governments | Responsible persons in schools<br><br>Responsible persons extra-school: socio-economic level, individual factors, parent involvement, etc. | Importance of clearly establishing who is responsible for what, including government actors and governments | Incorporating structural and extra-school factors as being responsible for the success/failure of the policy |
| Implementation system of consequences | Schools and teachers: principal providers of educational services | Full scale of chain of command: political and education authorities (from above)<br><br>Associate evaluation with educational improvement (shorten distance) | Importance of establishing system of consequences for poor outcomes | Educational accountability only looks at the last link in the chain of command |
| Level of citizen participation | Parents and society consume the test results to generate pressure on the schools, promoting freedom of choice | Voice and monitoring in vertical and horizontal chain of education policies | Importance of citizens participating actively in the resolution of their problems | Building relationships based on trust<br><br>Generate strategic actions more than tactical ones for this articulation to make sense |

*Source:* By authors.

## Defining Criteria for Success in Education Policy and Constructing Monitoring Indicators

In any policy to establish social accountability mechanisms, the criteria for success/failure of the policy need to be identified, and monitoring indicators need to be constructed. In the field of education the traditional criteria for the success of education policy were based on three main pillars: coverage, equity, and quality (Hevia 2014; UNESCO 2000). In the course of the 20th century the focus increasingly shifted to allowing children and adolescents to access school. The second Millennium Development Goal, for example, ensuring that all children worldwide could complete their primary schooling, has been achieved 91% in terms of world coverage, yet major problems persist in several regions, including Sub-Saharan Africa and Central America (UNDP 2018a).

Along with coverage, the equity of educational systems has been a fundamental criterion for analyzing the success or failure of education policies. The effects of these systems when it comes to maintaining inequalities (Bourdieu 1997; Bourdieu and Passeron 2001) and the importance of socioeconomic context in educational trajectories (Blanco 2013; Coleman et al. 1966) lead citizens to demand answers of the governments concerning their policies for fostering or limiting inequalities.

The third pillar has to do with educational quality, a concept over which there is an ongoing theoretical dispute.[19] UNESCO's Regional Office for Latin America and the Caribbean (OREALC/UNESCO 2007b) spells out five attributes essential to quality education: (1) equity refers to offering resources necessary for all students to attain their maximum level of development; (2) relevance when education promotes meaningful learning, in keeping with social requirements and personal development, but also associated with whether the purposes of education represent the aspirations of society as a whole or only of certain powerful groups; (3) pertinence has to do with the need for education to include the contents that persons need to develop in every sense; (4) effectiveness is learning what, it is supposed, one should learn, or the extent to which the stated objectives are attained; (5) efficiency is associated with the use of resources earmarked to education, financing, and the models of institutional and resources management (OREALC/UNESCO 2007b).

Accordingly, social accountability models need monitoring indicators on the coverage, equity, and quality of education, incorporating in this last category its various dimensions. In Latin America and the Caribbean various governmental and inter-governmental agencies, such as the Latin American Laboratory for Assessment of Quality in Education (LLECE-UNESCO) (Solano-Flores and Bonk 2008), the Mexican Institute for Education Evaluation (*Instituto Mexicano para la Evaluación de la Educación (*INEE)) (INEE 2018a), and the Brazilian National Institute of Educational Studies and Research (*Instituto Nacional de Estudos e Pesquisas Educacionais Anísio Teixeira* (INEP)) (INEP 2018) produce data with respect to these dimensions. Nonetheless, as we will see, the models of educational accountability that have been implemented in the last decade are characterized by limiting the criteria for the success or failure of the education systems to the outcomes of standardized multiple-choice tests, given in schools to the children who go to school that day; those tests are considered the leading indicator of the success or failure of education.

In effect, in the early 21st century there was a clear turn to "quality" as the leading measure of the success of education systems: it was not enough to send the kids to schools, we had to be sure they were learning.[20] Hence systems for evaluating educational achievement began to take on fundamental importance, particularly large-scale testing, to measure the success of the education systems (Iaies 2003; Lietz and Tobin 2016; Lockheed and Wagemaker 2013; Martínez-Rizo and Silva-Guerrero 2016).

Such evaluations offer a series of attractive advantages for transforming a complex concept such as "educational quality" into a number that is relatively easy to understand and use to make comparisons over time or with other units, to research the factors associated with these sources, to establish a series of measurable targets, and to evaluate the outcomes—more than the processes or inputs—of education policies.

These tests consist of constructing a valid and reliable scale to determine the extent to which certain children and youths achieve mastery of a set of key lessons at different moments of their time in school. Accordingly, the first step is key and consists of defining the learning that is to be measured. The national evaluation systems, and many international ones, use the curricular

standards for identifying expected learning. Examples of this are the regional assessments that UNESCO organizes in Latin America (UNESCO et al. 2015), and the National Plan for Evaluating Learning (*Plan Nacional de Evaluación de los Aprendizajes* (PLANEA)) under the responsibility of the INEE in Mexico (INEE 2018b). Other evaluations, like PISA, constructs its own standards for expected learning, and they do not use curriculum-based standards (OECD 2006). Citizen-led assessments, such as ASER in India and Pakistan, UWEZO in Kenya, Uganda, and Tanzania, and MIA in Mexico are focused on basic learning more than on learning expected by age, and apply one and the same instrument to children ages 5 to 16 years (Banerji, Bhattacharjea, and Wadhwa 2013; Hevia and Vergara-Lope 2016; Mugo et al. 2015).

Once the standards are defined, various adaptations are made of the items (which in the case of comparative tests include complex processes of translation and adaptation) to adjust the validity and reliability of the instrument to the standards defined, making it possible to classify children and youths by their level of achievement using agreed-upon international standards. In general, these items are expressed in closed answers to multiple-choice questions (Tristán and Vidal 2006). Finally, these tests can be applied to an entire population—as in the case of census tests—or to representative samples, depending on the general interest behind the evaluation. The outcomes are expressed in a number that makes it possible to situate the test-takers on the respective scale with respect to mastery of the predefined standard. And this number—which is aggregated in averages by given units, be they schools, systems, states of the union, or countries—is the "magic number" that makes it possible to grade the success or failure of education systems.

According to their advocates, the benefits of educational accountability systems based on publishing results of standardized tests include the following: (1) the information can be used to improve education (Custer et al. 2018; Fullan 2010; Hopkins 2008); (2) it can inform remedial actions in the schools (Bruns, Filmer, and Patrinos 2011; Maier 2010); (3) it facilitates increased control over and monitoring of these actions at the school level to get better outcomes (Loeb and Figlio 2011); (4) it helps improve the decision-making process—now evidence-based—such as reducing the student-teacher ratio; (5) it has contributed to an increase in the number of teachers who pursue graduate studies; and (6) it is used for raising teacher salaries (Boyd et al. 2008; De la Vega 2016; Dee and Jacob 2011; Kress, Zechmann, and Schmitten 2011). Elmore (2010:60) provides a good summary of the promise implicit in incorporating educational accountability systems:

> Education policies speak of "holding the schools accountable for their results." The idea is that by applying a combination of performance standards and classification, supervision, and sanctions regimes, the schools and the persons who work in them will end up understanding what is expected by them by policymakers (and probably society as a whole), and over time will change their individual and collective behavior to meet those expectations. Seen in this light, the policies produce performance.

The discussion on the uses of these evaluations in Latin America has placed emphasis on the pressures they place on the education authorities and various effects they have in the press, public opinion, and the schools, and also due to the "distance between the information generated and its use by the education authorities, principals and teachers, and parents" (Martinic 2008:21-24).[21] Yet there is a general consensus with respect to the usefulness of these evaluations for education systems. Martinic (2008:15-18) summarizes this consensus as follows:

> The production of information and knowledge through evaluation is the surest way to improve the quality and equity of education in Latin America … for reforms in this area to succeed a new culture of evaluation is needed, centered on learning, and accompanying the whole change process at the different levels and areas of the system…. Evaluation becomes a technical and political device not only for the state but also for society, and constitutes a tool that contributes to the control the actors can exercise over the authorities and policies. Monitoring and evaluation, on supporting an environment for deliberation and political debate, are instruments for learning and, at the same time, for the empowerment of the persons concerned. At the same time, they contribute to the development of social capital by supporting credibility and public trust.

The most studied example of how standardized evaluation is gaining ever more power in the education debate is PISA, because of both its broad coverage and its growing importance. This test, which year after year includes more countries that want to evaluate themselves, posts national scores—and in some cases sub-regional scores when this can be paid for—in the areas of communication, math, and science. It posts an average score per country and a comparison among countries based on that score, as well as a series of analyses of factors associated with those outcomes, and a series of recommendations that are discussed by the high-level political and education authorities (OECD 2010, 2012, 2015). The results are presented to the public. When the general results of PISA 2015 were

presented to the 10 countries in Latin America and the Caribbean that participated, 133 press articles and related documents were published. Of these, 97 were opinion articles in the press; 14 were by civil society groups, and 22 were by governments (Meier 2017).

Nonetheless, an analysis of the use of PISA in European countries showed that the information generated by this test was used by political actors to confirm and legitimate pre-existing opinions, regardless of whether they contradicted the outcomes of the survey (Pons 2011:540). Political authorities, including legislators and education authorities, used the results above all to position themselves vis-à-vis specific education reforms. According to Pons (2011:544), this was possible



Students preparing presentation after group discussion during CAMaL training. Photo: PAL photo bank

because "the official publication of PISA results by the OECD and by the authorities which are in charge of its national implementation does not lead to many complementary or further analyses by researchers, experts and evaluators."

The number generated by these large-scale assessments of educational achievement, in Mexico and in several countries of the region, became a "hard" indicator to determine whether education was or was not improving. For the Mexican case, according to Muñoz, since 2003 there has been a trend in Mexico to publishing the PISA results "broadly and responsibly," in contrast with the TIMSS (Trends in International Mathematics and Science Study) results in the 1990s (Muñoz Izquierdo 2005:85), which were not released to the public. Creating national systems for educational evaluation and for publishing these results is useful for "guiding the policy" (Muñoz Izquierdo 2005:97), giving rise to targets for the country to the point that several studies identify the "PISA effect" as a key factor leading education policies to be built on the foundation of these results.[22]

For example, in the 2007-2012 education sector program in Mexico, the first indicator for objective 1—"Increase the quality of education so that students improve their educational achievement, have the means to attain greater wellbeing, and contribute to national development" —was the score on the PISA exam on mathematics and reading comprehension, climbing from 392 points (2003 result) to a target of 435 points (Ministry of Public Education (SEP) 2007:15). In the following administration the percentage of students who obtain insufficient achievement on the Educational Quality and Achievement Exams (Excale in Spanish), developed by the Mexican Educative Evaluation Institution (INEE) to measure educational achievement was used as an indicator, dropping from 20.2% in Spanish for 3rd grade of primary school in 2010 to 17.2% in 2018, and from 31.8% to 27% for the same years in mathematics (SEP 2013b). Years later, in the legislative discussion on educational quality, the results of PISA and the national tests were the indicators used for describing the weaknesses of the Mexican education system (Cortés 2015).

In summary, educational accountability systems have focused on developing large-scale educational tests as the main inputs for setting criteria for the success of education policies (Cárdenas 2017), hence the importance of evaluating learning—using large-scale tests—to produce information (Anagnostopoulos, Rutledge, and Jacobsen 2013; Lingard et al. 2015).

## Effects of Educational Accountability on the Educational Community

Research on the effect of educational accountability, based on standardized tests as the sole factor of success/failure, is not conclusive, at times supporting clashing positions. Its advocates argue that educational accountability systems succeed in focusing the discussion on learning: thanks to the need to generate information on learning major strides have been made to measure and compare it, requiring a discussion of what each society perceives as indispensable (World Bank 2018).

Several studies suggest, in more specific terms, that the effect of these systems on learning is positive yet limited. In the United Kingdom, for example, there was a reduction in school performance in Wales after they stopped publishing high school performance tables (Burgess, Wilson, and Worth 2010), in line with what was found in the United States at the beginning of the NCLB (Dee and Jacob 2011). Burns et al., analyzing several case studies in Chile, Uganda, Pakistan, India, and Liberia, found that weak systems of educational accountability, especially systems with a low level of sanctions, are associated with poor performance and at the same time, in certain circumstances, providing the information to the "clients" produces positive effects on learning outcomes (Burns, Schlozman, and Verba 2001:63-64).

Nonetheless, there is a growing literature that criticizes test results being treated as the principal or sole measure (Apple 2003; Ball 2003; De la Vega 2016). There is even talk of a "tyranny of the numbers" as limited criteria for success of an education policy (Ball 2015) and its negative impacts on education systems (Lingard 2011) in three dimensions: on the educational processes themselves; on their limitations when it comes to promoting fundamental elements of social justice; and on the risk of cheating given the disproportionate importance they have taken on.

With respect to the educational processes themselves, various research studies that promote the implementation of standardized tests, and linking them with consequences, find positive yet limited effects on educational

achievement. Hanushek and Raymond (2004:2), for example, after analyzing the implementation of accountability systems in United States, conclude as follows:

> We find that the introduction of accountability systems into a state tends to lead to larger achievement growth than would have occurred without accountability. The analysis, however, indicates that just reporting results has minimal impact on student performance and that the force of accountability comes from attaching consequences to school performance.

O'Day (2004:24-25) reaches similar conclusions. She affirms that available evidence suggests that:

> … teachers are working harder in response to the accountability measures and are more focused on externally set learning goals… There is also evidence of an impact on achievement. In the first 4 years after instituting its school accountability policy, Chicago posted increasing scores in both reading and mathematics, although reading scores began to level off in 2000.

In the case of the Latin American region, analyses of the reforms implemented in Chile (promoting choice); Colombia (concessions and administrative changes); and Nicaragua (school autonomy and participation) conclude:

> There is limited evidence that those changes translated into improvements in either instruction or achievement and they do not appear to have affected classroom practices, even if they do appear to have improved accountability (Gershberg, González, and Meade 2012a:1034).

Along the same lines, there is growing evidence of the unintended consequences that the increased power of large-scale tests has on teaching-learning processes. This effect includes the risk of simplifying cognitive processes so as to reward quick answers with higher scores; doubts concerning the validity of the outcomes due to pressure to improve results; reducing the syllabi of some disciplines not considered key, such as the humanities or the arts, given the narrowness of the contents usually measured; making the school less attractive for students and teachers; increasing the number of hours devoted to

preparing for exams with a high opportunity cost and little sense of "ownership" over their own growth; increased anxiety among students; negative effects of the tests on learning motivation; the lack of correspondence among the context of the test, the study plan, and instruction; the excessive emphasis on discrete and routine skills while neglecting complex thought processes and problem-solving; and the limited relevance of the multiple-choice formats for learning whether in the classroom or in the real world, among other problems identified.[23]

A second source of criticisms comes from a growing group of researchers looking into social justice in education (Ayers, Quinn, and Stovall 2009). According to this current, the goal of social justice in education is "to enable people to develop the critical analytical tools necessary to understand oppression and their own socialization within oppressive systems, and to develop a sense of agency and capacity to interrupt and change oppressive patterns and behaviors in themselves and in the institutions and communities of which they are a part" (Bell 2007:2). In this context, standardized evaluations have been identified as counterproductive when it comes to guaranteeing social justice (Lingard et al. 2015), for example with disability in the United States (Danforth 2015), using the outcomes only for summative and not formative purposes, in different types of educational triage. Flórez and Rosas analyze the negative effects of standardized evaluations on three dimensions of social justice: distribution, representation, and participation. Similarly, Gil and Kim criticize the absence of the dimensions of equity and equality in the ever more consolidated role of standardized evaluation as the sole measure of whether the educational system is succeeding (Gil and Kim 2018).

Finally, the growing weight of standardized testing has consequences in terms of corruption in education, suggesting the relevance of Campbell's hypothesis regarding how over-reliance on measurement instruments can corrupt test results (Backhoff and Contreras Roldán 2014; Darling-Hammond and Ascher 1991:19-20).

## Responses from Social Accountability in Education to Overcome These Biases

Processes of social accountability in education therefore require overcoming the biases of educational accountability and constructing criteria of success beyond the outcomes of large-scale standardized tests. The

purposes of education in this century include forming persons with autonomy, fostering the individual and social development of persons who know how to engage in lifelong learning, accessing better sources of employment, supporting environmental sustainability, and forming free and responsible citizens (UNESCO 2016). Article 10 of the Constitution of Chile, for example, states that "the purpose of education is the full development of the person in the different stages of his or her life" (Republic of Chile 2017). In Mexico, it is said that "the education imparted by the State shall be aimed at developing, harmoniously, all the faculties of the human being and shall foster in him, at the same time, love for the Homeland, respect for Human Rights, and international awareness and solidarity, in independence and justice" (Mexico, 2017). Therefore, one would expect that the criteria for determining success or failure in education would be associated with those purposes.

There is no doubt that reading and mathematical reasoning are fundamental for attaining the full development of the person and her faculties, but nor is it questioned that these are not the only areas that should be fostered to improve education. Despite that, the evaluation agencies, along with several international standardized tests, focus on just a few cognitive areas (language and mathematics; in some cases they include sciences or civics), and they grade the whole system based solely on these results. The limitation is also methodological, since in addition only one form of evaluation is used—based on multiple-choice questions—that is applied to those who go to school that day (Kane and Staiger 2002). Accordingly, fundamental criteria for assessing whether the education system is performing its substantive function—the development of the persons and the communities—are not evaluated and the results of standardized tests on reading and math appear to be overvalued, with standardized assessments becoming more influential powerful despite their counterproductive consequences for learning.

Thus an immense array of actions opens up for civic, community, and academic organizations to fill this information vacuum and propose new criteria of success and monitoring indicators that can complement (more than replace) the existing ones, while in the developed countries there is debate over the need to include measures other than standardized tests, nationally and sub-nationally.[24] Similarly, efforts have been made to evaluate other areas of basic learning, such as physical education (Sundaresan, Dashoush, and Shangraw 2017); the countries of the global South have seen successful innovations in this regard. In recent decades mechanisms have been strengthened that measure reading, early and orally, in various countries of Africa, Asia, and Latin America (Gove and Cvelich 2011; Prinsloo and Harvey 2017). In the organizations, including our own, that come together in the PAL Network, for example, we have extensive experience evaluating basic learning, more than the learning expected from the curriculum, in all children and adolescents independent of whether they go to school, in a variety of contexts, documenting the global learning crisis (Wilson 2018). Similarly, we are developing assessments of educational attainment that make it possible to find out whether children and adolescents have learned basic lessons to care for the water, for environmental sustainability, citizenship, handling one's emotions, or caring for one's own body.[25] These efforts have taken place in areas such as health (Sriring, Erawan, and Sriwarom 2015), and education for peace (Bush 2009; Duckworth, Allen, and Williams 2012), and the so-called "soft skills," key for getting a job (Cernigoi 2015).

The second meaning has to do with the need to generate feedback to all the parties involved, using educational assessment more for formative than for summative purposes. As has been debated for decades in educational research, evaluation is a fundamental part of the teaching-learning process, but it is trapped between two functions, classification and formation (Baird et al. 2014; Perrenoud 2008). The educational accountability model, in particular in its version of accountability focused on performance through tests, was focused on the classification function, such that the evaluation results grew distant from action to improve learning. Accordingly, the indicators that are used in the social accountability in education model explicitly seek to shorten the distance between the outcomes of educational assessment and educational improvement, i.e. maintaining the formative nature of education, geared to learning for the indicators that have been adopted, including the assessments and measurements of reading, mathematics, science, civics, and any other field. In the United States, for example, the discussion of the new education statute known as the Every Student Succeeds Act (2015) provides insight into much of the new academic debate on how to measure the success of an education policy, criticizing the scant

value they contribute to the schools if they are not accompanied by an investment in human resources and school leadership (Elmore 2010). Hence new instruments are being developed for measurement seeking to keep the tests learning-oriented and to bring extra-school knowledge into these assessments (Bourke, O'Neill, and Loveridge 2018).[26]

Along similar lines, citizen-led assessments have been developed as an alternative evaluation, with formative purposes, geared to generating information about the state of basic learning in several countries of the global South. The change theory of these programs sought to generate and share information to improve the quality of public services (Results for Development Institute 2015). These experiences were born in India though the ASER-Annual Status of Education Report Centre (Pratham 2016), and in a few years expanded to several countries, always seeking to ensure that the results of the assessments were linked to educational improvement. As one of its founders states: "Some say that ASER leads to greater accountability; we say ASER leads to understanding, ownership and responsibility for action" (Banerji 2013:88).

## Identifying Persons Responsible and Responsibilities

One fundamental characteristic of any system of accountability is assigning persons responsible and clear responsibilities (Fox 2007; Schedler 2004). In education, as we indicated in the introduction, this process is not easy: there are many actors and persons responsible involved in the teaching-learning process. Even so, when analyzing the educational accountability model another bias can be identified: the responsibility for educational success or failure is disproportionately focused on one class of stakeholder, the teacher. The narrative is more or less the following: For the educational accountability model the success of education is translated into high scores on standardized tests, and educational failure is associated with low scores on these tests. And it is clear who is responsible for the (low) scores: the teachers and the schools (Bruns, Filmer, and Patrinos 2011; Elmore 2010; Falabella and de la Vega 2016; Loeb and Figlio 2011; O'Day 2004). This is because the teachers are the fundamental player in the teaching-learning process, they are the ones in direct and continuous interaction



Volunteer teacher teaching reading in a school in Dakar, Senegal, 2017. Photo: PAL Network photobank

with the students, they are the ones who are most familiar with the students' potentials and limitations; therefore, they have the lead responsibility for the children learning.[27] Hence the importance of designing teaching policies to select the best teachers, train them adequately, and construct a teaching career service path that includes merit-based processes to enter, remain in, and exit the education system.

As we will see, available evidence confirms that teachers are an important factor in improving test scores, but it shows just as clearly that they are not the only factor. There is sufficient evidence that points to a series of extra-school and school factors related to educational attainment—measured in standardized tests—which despite public policy recommendations are rarely taken into account when it comes to designing public policies to improve education, and assigning persons responsible and clear responsibilities to various actors related to these factors. Educational accountability systems are focused on schools' performance, and therefore on teachers' performance; that is why they are identified as the persons responsible, and they are the ones whose activity produces the principal consequences.

## Factors Associated with Educational Achievement

The literature on associated factors is vast and generally constructed empirically, showing correlations between educational achievement—expressed in results of standardized tests most of the time—and school and extra-school factors. In the 1990s Hattie reviewed over 500,000 articles identifying associated factors (Hattie 2003), showing that analyzing the variables separately, nearly 50% of the variance was explained by the students' characteristics, another 30% by the teachers, and the rest by factors associated with home, parents, schools, and principals. Analyzing what factors have the greatest effect, or effect size, on academic improvement (such as the feedback or quality of instruction), this same author found that several were the responsibility of the teacher, and so he proposed a series of characteristics found in excellent teachers (Hattie 2003).

A decade later, the literature is consistent in showing that a large number of factors are associated with educational achievement, which makes it useless to think that a single factor can alter the general outcome; that the extra-school factors, in particular those related to the characteristics and motivation of students and to socioeconomic inequalities, have a strong correlation with the results; and that the school factors are more related to the school climate than to teacher training (P. A. Banerjee 2016; OECD 2016; UNESCO 2015).

For example, analyzing factors associated with low performance on PISA, the OECD identifies three major types of factors: first, the factors associated with socio-economic level and economic and ethnic inequalities[28]; a second type includes factors related to students' attitudes towards school and learning, such as motivation, perseverance, self-confidence, and regular class attendance. And the third type is defined by teachers and schools characterized by less solidarity, including aspects such as school climate, teachers' expectations of the children's future, situations of violence, and segregation of the school systems between the poor and those who are not poor (OECD 2016:13-15). In a systematic review of the literature taking these factors into account Banerjee confirms the factors identified by the OECD: the lack of positive attitudes with respect to school and learning, in particular among children who live in poverty, and with schools and teachers that show little solidarity, including teachers not coming to work, arriving late, and lacking discipline, as well as problems of school climate and discrimination in the schools. She adds some factors that the literature associates with educational attainment: family factors, such as the lack of parental involvement in academic areas, authoritarian model of paternity, and low level of schooling of mothers, along with factors related to neuro-physical development, including the development of executive functions and the negative impact of child malnutrition, as well as the effects of poor nutrition, mental health, and maternal-and-child health on learning (P. A. Banerjee 2016).

In Latin America and the Caribbean, UNESCO analyzed factors associated with the results of the TERCE test, finding once again that the socioeconomic and educational context of the parents is a fundamental and recurrent factor in all the countries, grades, and disciplines analyzed. Some of the students' characteristics were associated with one another, such as having been held back, having attended preschool, and not attending classes, as well as family factors, such as parents' expectations and their involvement in education, helping to form study habits, as well as students' ethnic origin. In addition, several factors were identified related to teachers,

pedagogical practices, and resources in the classroom, where factors related to teacher attendance and punctuality stood out, as well as the availability of notebooks and books for each students, and the existence of a propitious school climate, i.e. one that is cordial, collaborative, and characterized by respectful relationships. Finally, several characteristics of the schools were analyzed, including differences between urban and rural schools, and between public and private schools, violence in the school, and access to scholastic resources (UNESCO 2015). It should be noted that this study does not find a clear association between teacher training and learning: "The level of education of the teacher, obtaining a teacher's certificate, the approach to study in the teacher's initial training, the duration of the program of study, and participation in continuing education did not show a significant correlation with achievement on the tests applied" (UNESCO 2015:11).

When analyzing the type of policy recommendations made in these documents, it is clear that accountability and responsibilities do not suggest a single factor, and particularly not teachers. For example, UNESCO (2015) makes a series of recommendations for Latin America and the Caribbean that point to a wide range of persons responsible and responsibilities where in fact few recommendations are directed to teachers.[29] The situation is similar when it comes to the policy recommendations proposed by the OECD that are focused on non-school factors and fostering students' motivation (OECD 2016, 15).[30] The academic literature adds some suggestions, such as increasing teachers' expectations of and belief in their students; parental involvement; early interventions and initial education; healthy schools and school breakfast programs; better educational materials; better school climate and reducing violence in schools; improving school councils; and expanding extracurricular activities (P. A. Banerjee 2016).

Based on an analysis of the factors associated with educational attainment and the recommendations for improving performance, in particular of the population with the worst results, one can conclude, first, that school effectiveness is complex and multi-causal, without clear processes of causality (Bogotch, Mirón, and Biesta 2007; Townsend 2007), and second, that there are various persons responsible and responsibilities inside and outside the education system for whom and for which there must be accountability, in addition to

the teachers and the schools. Nonetheless, educational accountability, in particular under the notion of "performative accountability," as we will see next, insists on holding teachers accountable as those with the primary responsibility for the results of educational achievement, thereby biasing the identification of persons responsible and responsibilities and focusing more on the symptoms than on the causes associated with educational performance.

**School Performance and the Era of Performativity**

As we saw above, teachers are a necessary (Leigh 2010) but not sufficient factor for educational attainment. It also depends on the education systems (RAND 2012). Hence it is considered as one of the factors most responsible for educational outcomes. In opinion surveys in Mexico 48.3% of Mexicans were of the opinion that one of the key problems of education is the lack of prepared teachers, and 22.8% said that teachers do not show up for their classes (Zubieta García et al. 2015:159). Echeverría accused the media of blaming only teachers for poor education (Echeverría 2014). In large measure the argument for implementing the 2013 education reform (Hevia 2014) and the subsequent protests critical of the Mexican educational reform were focused on the teachers' sense of injustice as they were considered to bear the main responsibility for the poor quality of education (Hevia and Antonio 2017; Martínez and Navarro Arredondo 2018). Several civic organizations focused their demands on teacher evaluation and bringing about a professional teaching service as the main strategy for improving educational levels.[31]

Yet holding teachers accountable as those who bear the main responsibility for the poor quality of education is not a phenomenon found only in Mexico. In general, the monitoring systems that are part of educational accountability emphasize the responsibility that teachers and schools bear for educational outcomes, assuming that the effect (performance) can be attributed to a clear cause (lack of accountability of teachers and schools) (Elmore 2010:60). While there may be many profound causes, at the end of the road schools and teachers will be held accountable for the school's performance and the students' standardized test scores.

The emphasis on the individual performance of teachers or schools falls within what Ball defines as the era of

performativity: "Performativity is a technology, a culture and a mode of regulation that employs judgements, comparisons and displays as a means of incentive, control, attrition and change" (Ball 2003:216). The effect of these control devices on teachers has been studied in the literature that is most critical of educational accountability. Such studies have examined, for example, the unintended consequences such as the erosion of teacher autonomy, with a negative impact on their personal and professional identities; the negative impact on various teaching practices, and personal identities, and a sense of the scant participation of teachers in the decisions that affect them, even identifying a "collapse" between the governed (i.e. teachers) and the government (i.e. accountability mechanisms) and the normalization of the marketized teacher and the performative teacher (Holloway and Brass 2018:2).[32] The pressure to perform and the need for constant improvement, as in the case of Chile—where schools need to improve their indicators to maintain the viability of the school—draws school principals (Flessa et al. 2018) into a context of neoliberal accountability (Weistein, Marfán, and Muñoz 2016).

In summary, in addition to the reductionism of identifying the success or failure of education policy with the results of standardized tests one finds a second restriction, which holds one party (teachers) accountable for the whole (factors associated with educational achievement). To explain the 2013 Mexican reform, Manuel Gil used the apt metaphor in which he compared the education system with a rickety bus:

> The gear shift lever has a rope tied around it, the windshield is cracked, the seats are broken, there are holes in the roof, and the motor is in need of repair, and it is travelling on an unpaved road going uphill…. All of a sudden a group of persons says that we're going to fix this matter, because we need the bus to go faster because the world is not going to wait for us and, then then say, paradoxically, that the solution is to train the drivers (Gil Antón 2013).

This metaphor is a good description of the bias of invoking accountability focused on teachers, without considering the other factors, persons responsible, and responsibilities that make it possible to demand accountability for improvements in education.

## Responses from Social Accountability in Education to Overcome These Biases

To strengthen education systems it is essential to clearly establish who is responsible, including governmental actors and governments, and to analyze a series of school factors, including the presence of teachers, their training and motivation, and the provision of educational materials. Nonetheless, as was seen in the previous section, under the concept of "educational accountability" the main responsibility lies with the schools, and therefore school factors are overvalued, including teachers, educational management, provision of materials that support teaching, leaving certain structural causes out of the analysis, such as limited financing for education, actual class time, and the student-teacher ratio, and also excluding from the analysis monitoring and oversight of several extra-school factors that have just as much influence if not more than the school factors on educational attainment. These extra-school factors include the conditions of the students themselves—their capacities, motivation, and responsibility for learning—and family and socioeconomic factors.

Thus, efforts to ensure social accountability in education should focus on identifying persons responsible and responsibilities related to the most profound causes related to the problems of educational coverage, equity, and quality. According to the recommendations for improving scholastic achievement found in the international evidence, one can draw up a long list of responsibilities, lead persons responsible, and programs and policies needed to improve education, and that therefore these should be monitored by governmental and nongovernmental organizations interested in improving education (Table 2).

There are six major types of responsibility. The first has to do with improving students' attitudes towards education and school. Here it is the students and those in most immediate contact with them who bear the lead responsibility: their households, teachers, and community. Some specific policies and programs are geared to fostering motivation and academic self-efficacy, as well as including greater participation of the parents and communities when it comes to valuing education as a fundamental right for attaining individual and social goals. In this respect, there are some government evaluation agencies that monitor these policies, as in Chile and the

**Table 2. Dimensions, Persons Responsible, and Responsibilities for Improving Education**

| Responsibilities | Lead persons responsible | Specific policies and programs | Examples |
|---|---|---|---|
| Improve students' attitudes towards education and school | Students<br><br>Parents<br><br>Teachers<br><br>Community | Inspire the students to make the most of available opportunities for education.<br><br>Foster motivation and academic self-efficacy<br><br>Develop study habits<br><br>Foster the participation of parents and the local communities. | Chile: Agencia de Calidad, with respect to new measurements of the SIMCE, but without citizen monitoring<br><br>India: Actions to improve and monitor "soft skills" (Cernigoi 2015; Magic Bus 2019)<br><br>Uganda: Fostering informal early education (Ezati, Madanda and Ahikire 2018) |
| Guarantee access to and retention in the education system | Education authorities: design and evaluation<br><br>Legislative: budget<br><br>Schools: management | Promote equity in access to and retention in school for greater social inclusion in school: eliminate charges that pose economic barriers; prohibit selection processes; facilitate school transport; programs with incentives for retention<br><br>Ensuring the offer to educational opportunities with teachers who are well-prepared and motivated<br><br>Reducing inequalities in access to early education. Expanding preschool education for children ages 4 to 6 years: endow them with adequate spaces, materials, care, and teaching staff | Several countries: Monitoring index for the right to education (Baker and Krupar 2018)<br><br>Uganda: Reduced absenteeism thanks to information from management committees (Barr et al. 2012); Hubbard 2008; Reinikka y Svensson 2004; Reinikka y Svensson 2011.<br><br>Madagascar: Multi-level follow-up: schools and school districts, better than just schools (Lassibille et al. 2012)<br><br>India: Information campaigns in various states (Pandey, Goyal, and Sundararaman 2008) |
| Reduce lags in learning | Teachers: identifying students and working together;<br><br>Households: working together with teachers and schools<br><br>Schools: design strategy;<br><br>school supervision: support, development of strategy;<br><br>Education authorities: design, financing, evaluation | Provide corrective support as early as possible: Identify low performers and design a strategy whereby the policy is adapted.<br><br>Replace the mechanism of holding students back: Academic support programs for students who are lagging behind; means for early detection of learning challenges. | Several countries: Importance of independent measurements for taking stock of basic learning (Thindwa 2017)<br><br>India: Pratham with actions focused on delivering information and direct actions (Banerjee et al. 2007, 2010).<br><br>Actions in India, Liberia, and Pakistan (Bruns, Filmer, and Patrinos 2011)<br><br>India: Systematic information on school management for school communities to improve educational levels (UP, MP Karnata) (Pandey, Goyal, and Sundararaman 2011) |

| Responsibilities | Lead persons responsible | Specific policies and programs | Examples |
|---|---|---|---|
| Bring about more inclusive, motivating and compassionate schools | Principals<br><br>Teachers<br><br>Students<br><br>Parents | Create demanding and supportive learning environments.<br><br>Ensure the provision of adequate spaces for learning, including bathrooms and access to clean water.<br><br>Increase teachers' expectations of their students<br><br>Develop social capital in the school environment: foster cultural, social, and sports activities<br><br>Strengthen programs for initial teacher training on effective pedagogical practices (teaching methods)<br><br>Strengthening teaching and educational management capacities for the students' harmonious development: support academic practices and monitoring of and feedback for teachers<br><br>Participation of parents and support for vulnerable students: positive interaction between school and home<br><br>Improve the school climate and reduce violence within schools<br><br>Limit the use of classifications of students. | Educational infrastructure in Ghana (Ampratwum, Agyei Ashon, and Tetteh 2014)<br><br>Strengthening school autonomy (Bruns, Filmer, and Patrinos 2011)<br><br>Kenya: Modes of local hiring of teachers (Duflo, Dupas, and Kremer 2015)<br><br>Moldova: Monitoring budgets on a school-by-school basis (GPSA 2019)<br><br>India: Strengthening school committees and participation (Pandey, Goyal, and Sundararaman 2011)<br><br>India: Reducing school absenteeism (Pandey, Goyal, and Sundararaman 2011)<br><br>Indonesia: strengthening school committees (with few effects on learning) (Pradhan etstrengthen<br><br>Philippines: Improving school infrastructure through citizen monitoring (Shkabatur 2014)<br><br>Uganda: Improving school infrastructure (Thindwa 2019) |
| Education policy for reducing the weight of context | Education authorities: design, evaluation<br><br>Legislative: funding, evaluation<br><br>Schools: management | Having individual educational materials in the classroom: production and distribution of textbooks and notebooks<br><br>Offer special programs for immigrant, minority, and rural children.<br><br>Policies that make possible parity learning as between indigenous and non-indigenous students: bolster the teachers' capacity for proactive inclusion of children; develop different methods of teaching and evaluation; strengthen curricular design and intercultural materials.<br><br>Policies and practices for equity in learning as between boys and girls<br><br>Address gender stereotypes and help single-parent families. | Philippines: (ANSA-EAP 2019); Arugay 2012; Fox, Aceron, and Guillán (2016); Majeed (2014).<br><br>Strengthening strategies for reading and writing in Central America: (Basic Education Coalition 2019)<br><br>Actions to strengthen school autonomy and budgetary transparency (Bruns, Filmer, y Patrinos 2011)<br><br>Zimbabwe: monitoring the school curriculum (ECOZI 2019)<br><br>Monitoring SDGs (Mundi 2017) |

**Table 2. (continued)   Dimensions, Persons Responsible, and Responsibilities for Improving Education**

| Responsibilities | Lead persons responsible | Specific policies and programs | Examples |
|---|---|---|---|
| Social policy to reduce the weight of context | National and local executive: intra-governmental coordination<br><br>Legislative: funding and evaluation<br><br>Education authorities: coordination | Provide healthy environments and school breakfast<br><br>Provide support targeting underprivileged schools and/or families.<br><br>Support for vulnerable students and the schools that serve them: coordination of compensatory programs and cash transfers<br><br>Measures to palliate the association of socioeconomic inequalities with educational achievement: intersectoral social policies. Continued support for underprivileged schools<br><br>Improve the targeting of education and social policies depending on dependence and variance explained between socioeconomic status and performance in school | Conditional cash transfers and effects on education; monitoring scholarships in Mexico (Fernald, Gertler, and Neufeld 2008) and Nicaragua (Macours, Barham, and Maluccio 2014)<br><br>Scholarships in Mexico (De Hoyos Navarro, Attanasio, and Meghir 2019) |

*Source:* Compiled by authors based on recommendations of P. A. Banerjee (2016); OECD (2016); UNESCO (2015); Westhorp et al. (2014).

recent incorporation of questions on school motivation in the SIMCE standardized test (Agencia de Calidad de la Educación 2019). In India, co-production actions are being carried out bringing together authorities and civil society organizations to strengthen what are called "soft skills" (Cernigoi 2015; Magic Bus 2019), but in general it is hard to find government policies geared to improving student attitudes, and actions involving nongovernmental accompaniment and monitoring.

The second responsibility has to do with guaranteeing access to and retention in education systems. Here those with the lead responsibility are the education authorities, national and local, who should put in place policies for access and universal coverage, eliminating economic, social, and cultural barriers to schools, and in particular promoting early childhood education. Yet the legislature also bears responsibility in terms of assuring a sufficient budget for implementing these programs. Schools (principals and teachers) share responsibility for implementing those systems and for being concerned to prevent school dropout in each and every educational trajectory. Actions guided by social responsibility in education have yielded considerable evidence

that puts the focus on budget monitoring at various levels to improve school coverage and keep students from dropping out. Paradigmatic examples include the effects that getting information to the schools councils has had in diminishing absenteeism and improving educational levels generally in Uganda (Barr et al. 2012; Hubbard 2008; Reinikka and Svensson 2004, 2011). In this literature it is essential to generate and disseminate information on multiple levels, as illustrated by the case of Madagascar (Lassibille et al. 2012), the reduction of student absenteeism as well as teacher absenteeism in India (Pandey, Goyal, and Sundararaman 2011), and the differences found among states of India in the use of information to ensure access to the education system (Pandey, Goyal, and Sundararaman 2008, 2011).

The third responsibility is reducing the learning lag (Vergara-Lope and Hevia 2018), i.e. ensuring that all children are learning the minimum content. This means early identification of low-performing students and putting in place specific strategies, as well as replacing the holding back of students with programs to provide academic support. It is apparent that identifying single persons or factors responsible is quite complex. First, teachers have

the task of identifying these students and applying the strategies identified. And then, the schools have to design these programs and assign them personnel, materials, and support. Parents and households should participate in these support programs, which should also include school supervision, providing technical support to the teachers. Finally, the education authorities have to design the policies and general guidelines, as well as ensuring the funding of these compensatory actions.

On this point, the importance of independent measurements is key for taking stock of basic learning, which has been a fundamental part of the transparency agenda for education (Thindwa 2017). The organizations that are part of the PAL Network have more experience with these responsibilities, whereas Pratham has more experience with actions focused on delivery of information and direct actions (Banerjee et al. 2007, 2010). Several experiences have also been documented in India, Liberia, and Pakistan (Bruns, Filmer, and Patrinos 2011) aimed at strengthening these compensatory actions.

The fourth responsibility is focused on the schools as the main actors—principals, teachers, and educational community in general—and has to do with ensuring that schools are inclusive, compassionate, and motivating. Here school management is fundamental for ensuring positive climates as well as for strengthening effective pedagogical practices and communication among teachers. It is at this level that more experiences have been documented, given that the priority methodology of social accountability has been focused on budget monitoring and specifically monitoring the public budgets at the school level. Accordingly, the effects of social accountability have been documented for improving educational infrastructure in Ghana (Ampratwum, Agyei Ashon, and Tetteh 2014), strengthening school autonomy in various contexts (Bruns, Filmer, and Patrinos 2011), local contracting of teachers in Kenya (Duflo, Dupas, and Kremer 2015), improving transparency and joint work in Moldova (GPSA 2019), strengthening school committees and local participation in India (Pandey, Goyal, and Sundararaman 2011) and Indonesia (Pradhan et al. 2012), and generally improving school infrastructure thanks to citizen oversight and involvement in countries such as Uganda (Thindwa 2019) and the Philippines (Shkabatur 2014).

The fifth responsibility has to do with the actions that need to be taken in the field of education to diminish the weight of the socioeconomic context in educational attainment and the completion of successful educational trajectories. Here it is the education authorities who bear the main responsibility; they must put in place policies and guidelines focused on reducing learning gaps among systems and schools, generating affirmative policies for indigenous communities, designing special programs for vulnerable populations, and reducing gender inequalities. The legislatures are also co-responsible for adopting budgets that make it possible to implement these policies, and the schools for managing these programs proactively so that socioeconomic context is not the main variable that explains the high or low scores obtained in the schools. Here the focus is on local education budgets and monitoring key inputs, such as textbooks. The examples most often cited are the monitoring of textbooks in the Philippines (ANSA-EAP 2019; Arugay 2012; Fox, Aceron, y Guillán 2016; Majeed 2014) and actions to strengthen school autonomy and budget transparency (Bruns, Filmer, and Patrinos 2011). In addition, experiences have been documented that focus on strengthening strategies prior to literacy in Central America (Basic Education Coalition 2019), monitoring the school curriculum in Zimbabwe (ECOZI 2019), and monitoring the Sustainable Development Goals with citizen participation (Mundi 2017).

Finally, a responsibility is identified that extends beyond the field of education, and which has to do with coordinating social policies more generally to reduce the weight of context. Here, as is apparent, the persons responsible are situated in the political arena, namely the local and national executive branches, who are responsible for coordinating various social policies; and the legislative branches, which must ensure the funding and evaluation of these policies. Existing examples situate the focus of social policies and their importance, for example the impact of conditional cash transfer programs and their effects on education, as in the cases of Mexico (Fernald, Gertler, and Neufeld 2008) and Nicaragua (Macours, Barham, and Maluccio 2014), and the effect of scholarships on reducing the number of schoolchildren who drop out in Mexico (De Hoyos Navarro, Attanasio, and Meghir 2019).

Evidently, the further the distance between the responsibility and the persons responsible, and the more abstract the responsibility, the more difficult it is to hold anyone accountable. None of these

responsibilities, or persons responsible, acting alone, is able to transform education systems. The responsibilities associated with the school or the physical provision of resources are more easily imputable to those accountable for them. Other responsibilities, such as to coordinate between adopting compensatory policies for communities and designing specific affirmative policies for vulnerable population groups, or even to reduce the learning lag, show that vagueness in the assignment of responsibilities makes accountability difficult.

Cumulative experience shows, however, a capacity to use social accountability in education to address various policies identified in the table above. Thus, for example, with regard to access to and retention in the education system, several countries have developed education policies geared to early childhood, including childcare centers and increasing capacity in early childhood and preschool education (Alarcón et al. 2015; Gregosz 2014; Tedesco 2017). Several organizations, such as the World Organization for Early Childhood Education (*Organización Mundial de la Educación Preescolar* (OMEP)), monitor early childhood education policies. The OMEP has chapters in several countries of the region (Crosso, Mayol, and Eigbar 2018; OMEP 2019). Nonetheless, other important policies have no citizen monitoring, despite their impact at the local level. Policies of not holding children back, for example, which are fundamental for reducing the learning lag, have been implemented in Mexico in recent years (SEP 2013a), giving rise to polemics within the schools; yet this initiative has not been taken up by the various organizations working on education in Mexico. The situation is similar when it comes to designing a program for early identification of children at risk of falling behind (SEP 2018), which was necessary but insufficient for addressing the learning lag (Vergara-Lope and Hevia 2018). In practice there is no official or independent evaluation of that program to determine whether this procedure was helping to keep children from dropping out. In the case of the policies and programs needed in order to have more compassionate and inclusive schools and teachers, there has been significant monitoring of policies related to school bullying from the academic sphere, with the development of research into this issue and the development of alternatives (Mendoza and Pedroza 2015; Santoyo and Frías 2014), but with fewer civil

society actions, or actions by collaborative groupings such as parents' associations.

Similarly, monitoring education and social programs and policies to reduce the weight of socioeconomic and cultural context requires more active commitments on the part of society. In Latin America and the Caribbean, designing education policies tailored to the needs of the indigenous and Afrodescendant population is on the agenda of several organizations, including the *Latin American Campaign for The Right to Education* (CLADE) and various thematic groups of the *Latin American Council of Social Sciences* (CLACSO).[33] Changing the system that produces a high degree of segregation and selection of the students, and ending profit-orientation, were among the most deeply-felt demands of the Chilean student movement (Bellei 2015; de la Cuadra 2007). Outside Latin America and the Caribbean cases have been documented that involved monitoring the distribution of educational materials (Fox, Aceron, and Guillán 2017), as well as examples of monitoring policies of separation and differentiation as between public and private schools (Siddiqui 2017). Nonetheless, there is not enough information on the follow-up, oversight, or monitoring of these programs.

## Putting in Place Sanctions and Consequences for the Actors/Persons Responsible

Along with assigning responsibilities and persons responsible for them, systems of accountability are characterized by having a clear system of sanctions and intended consequences for the authorities responsible (Fox 2007). As we will see, in the field of educational accountability there is a highly-developed system of sanctions and consequences, yet one notes a major bias in terms of who is at the receiving end of the sanctions.

If the criterion of success in education is the number associated with a standardized test, and if those who bear the principal responsibility for that outcome are the teachers, it is not surprising that the consequences, both positive and negative, proposed by educational accountability are focused on the educational community–students, teachers, and schools–more than on those who bear the political and administrative responsibilities and who are required to report, justify, and be accountable for education.

As for positive sanctions, in both Chile and Mexico incentives systems have used the standardized test results to build economic and social stimulus programs, despite recommendations on the incorrect use of these evaluations to generate rankings or be used for economic stimulus programs (Santibáñez et al. 2007). Sometimes, when the results allow one to say, "we increased the score" or "we are better than our competitors" some educational authorities give themselves a medal (Meier 2017). Nonetheless, when the results do not meet expectations various sanctions are activated which, as has been studied in the Chilean case, may go as far as shutting down schools (Bellei 2015). In the case of Mexico, the dispute over education reform was focused on establishing sanctions that would put teachers at risk of losing their jobs (Martínez and Navarro Arredondo 2018). However, there are no sanctions for poor decisions about education spending, for the lack of specific policies to address the learning lag, for the absence of school breakfasts in public schools, or for parents' low level of schooling, it is at the last link in a long change of actors who participate directly and indirectly in learning where accountability and sanctions are imposed.

## Intended Consequences for Teachers and Schools

In addition to the intended consequences, which include a system of incentives and punishments tied to standardized test results and geared to teachers, the unintended consequences of these systems on the same actors must be examined. As we saw in the first point of comparison, the evidence points to several negative effects on the students. The focus on teacher assessment standards and the dedication of time and resources in the schools to these standards, may be at the expense of other priorities (Stosich 2018:215). This produces various negative effects, including a steady deterioration of the school environment and growing workplace stress as a result of test-based accountability (including in primary education), which include negative effects on school culture, teaching practices, and principals. The conclusion: school innovation requires mechanisms other than educational accountability (Greany 2016). The Global Education Monitoring Report notes this bias when it states that the effects of implementing accountability mechanisms may be counterproductive and provoke results contrary to those intended (UNESCO 2017:295).[34]



Elementary teachers participating in Pratham camp in Uttar Pradesh, India, 2017. Photo: PAL Network photobank
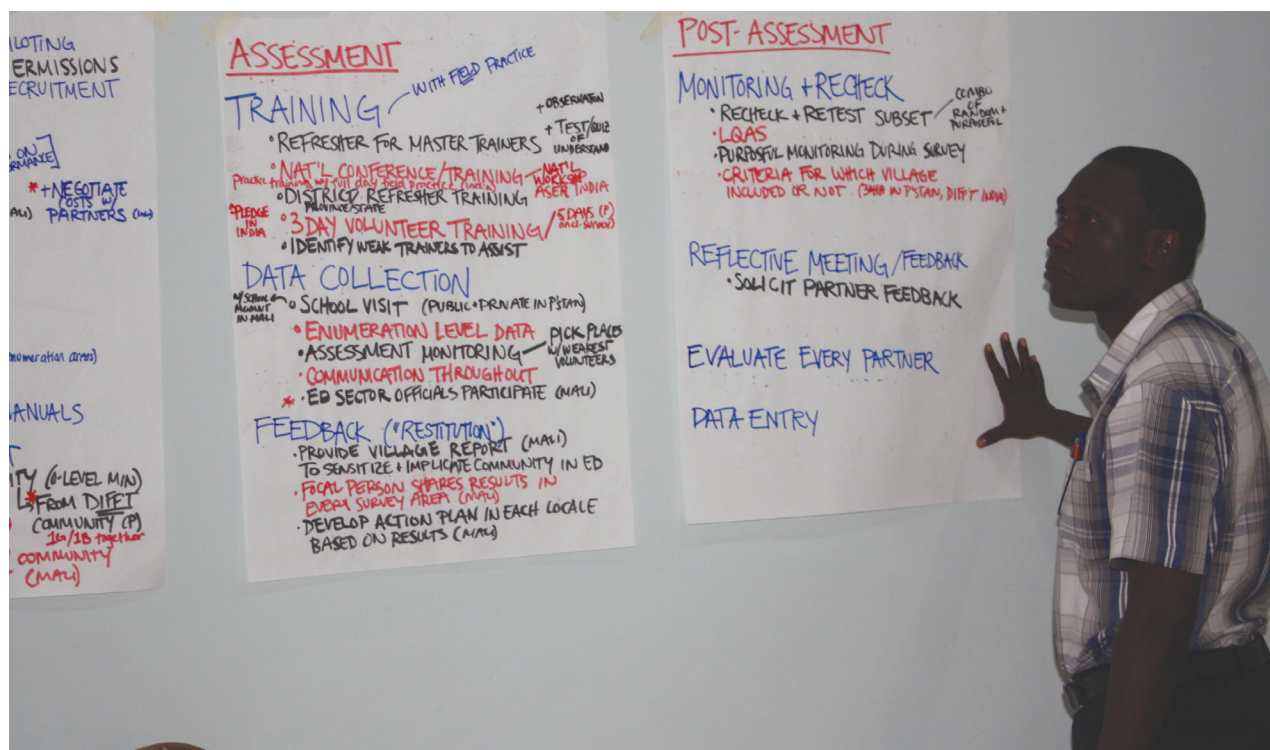
Participatory planning workshop to generate alternative evaluations, Kampala, Uganda, 2017. Photo: PAL Network photobank

## Responses from Social Accountability in Education

From a perspective of social accountability in education, proposals regarding sanctions go in two directions. First, they identify the full chain of command in education policy, including political and education authorities responsible for designing and implementing policies and programs, as analyzed in the previous section. And second, they identify persons responsible and responsibilities, as doing so may be directly tied to educational improvement. The idea is to link assessment with educational improvement, both in school and beyond.

## Level of Participation of the Different Actors Involved

The fourth dimension analyzed has to do with citizen involvement. From both a social accountability perspective and an educational accountability perspective citizen involvement is a crucial element, although differences may be noted in the assumptions about participation in both perspectives. As we will see, for educational accountability involvement, is focused on access to information in order to pressure schools and teachers to

achieve improved performance, with very little participation on the part of parents or citizens. Participation from the standpoint of social accountability in education, by way of contrast, seeks to give greater voice and to monitor the vertical and horizontal linkages of education and social policies that also help determine educational achievement.

## Empowering Parents by Fomenting Distrust

To analyze the effects of greater participation on parent involvement, one must understand what type of teacher-school-parent-community relationships are promoted. In large measure the theory of change of educational accountability rests on the idea that disseminating results to local communities will itself generate "positive pressure" on schools and teachers to improve those results. From this perspective, families and communities have an active role to play: by generating pressure through their voice and/or by leaving, exercising freedom of choice. Accordingly, several programs have been implemented to disseminate information on schools and their results using scorecards, in the global North and the global South (Joy and Moses 2016; Swan, Guskey, and Jung 2014). Such initiatives see parents as

"client-citizens" who use information to hold the providers of the educational service—schools and teachers—accountable in a "short-route" to accountability (Gershberg, González, and Meade 2012b). This proposal, however, faces two major limitations. The first relates to effectiveness and the second has to do with the type of relationship that is proposed between parents/community and teachers/school.

As for the first, one limitation of this model has been analyzed by Jonathan Fox (2015), who describes processes of providing information as "tactical," as opposed to "strategic" processes, which would seek to combine access to information with other advocacy, lobbying, and vertical oversight actions at each stage of public policymaking. Accordingly, he concludes that the effects of merely providing information are not sufficient to attain accountability (Fox 2015; Fox, Aceron, and Guillán 2017). Along these same lines, other authors emphasize that this limitation has to do with the difficulty of incorporating the voice of citizens in this "short route" model (Winkler 2006).

As for the second limitation, the type of relationship that this model proposes between parents/community and teachers/school is based on distrust, particularly distrust of the teachers' abilities and training, and of principals' adequacy. This distrust finds expression at the local level in different ways, including scant involvement in school activities and lack of communication between parents and teachers with respect to children's specific problems (Observatorio Ciudadano de la Educación 2008). Distrust also finds expression in contentious relationships, where parents often confront schools through a broad repertoire of protest tactics, from filing petitions with the education authorities over irregularities in the schools to illegally occupying school offices (Hevia 2014).

Locally, relationships of distrust in education occur in the context of asymmetrical power relations, thus the actions that can be taken to demand responses to teachers behavior places parents directly at risk (Hevia 2016a). More broadly, distrust is expressed in the loss of prestige of the teaching profession, and lack of teacher motivation to improve their own capabilities (Tenti and Steinberg 2011), conveying a rather pessimistic idea of the importance of education for social mobility (Muñoz Izquierdo 2009).

Distrust also finds expression in the lack of interest of citizens generally in bringing about innovative processes for educational improvement, or in becoming more actively involved in the education debate. In Mexico, while one finds a wide array of civil society organizations geared to improving education in very specific places—some schools in some states—they are not well coordinated with one another, nor with other civil society organizations that are more focused on advocacy in education policy and who have used the results of the education assessments for strategic litigation, such as Mexicanos Primero, Suma por la Educación, UNETE, and Vía Educación (Cárdenas 2017). At the local level, the educational demands of the educational communities are expressed in terms of improving the physical plant and resolving specific conflicts with teachers, more than demands for more educational materials or pedagogical changes (Hevia 2017). In an empirical study of thousands of demands and petitions put to the authorities, no petitions were found related to the results of the national tests, or to the demand for more teacher evaluation (Hevia 2014), demands that are fundamental for national civil society organizations.

The case of Mexicanos Primero is paradigmatic for understanding the biases in the kinds of relationships promoted by the educational accountability model. Mexicanos Primero, a civil society organization with strong ties to the business sector, played a fundamental role in implementing the 2013 educational reform that put in place "high-stakes evaluations" of teachers (Cortina and Lafuente 2018). The organization was established less than 15 years ago, but it gained national notoriety with by producing the documentary "De panzazo," which showed how infrastructure and pedagogical dynamics in Mexican schools lagged behind and blamed the problem on the hybridization of the leadership of the powerful teachers' union (Sindicato Nacional de Trabajadores de la Educación (SNTE)) with federal and state authorities, in a plot analogous to the documentary "Waiting for Superman," produced in the United States around the same time (Rodríguez 2012; Rulfo 2012).

The documentary and the activities of various civil society organizations made the "poor quality of education" due to "teachers who didn't want to be evaluated" a public issue in the 2012 Mexican elections. A forum was organized with presidential candidates, and there

was major follow-up on their commitments to end the informal pact between the union and the education authorities (10 por la Educación 2016). In early December 2012, the new administration announced the "Pact for Mexico," a multi-party agreement to give impetus to a series of political, social, and educational reforms. It announced an "education reform" geared politically to "recovering the lead role of the state" and technically to creating a professional teaching service and an evaluation system "with consequences" for teachers (Góngora and Jiménez 2015).

*Mexicanos Primero* played a fundamental role in these proposals and consolidated its influence in education policymaking. It was a member of the advisory council of the institute responsible for evaluating students and teaching performance and continued publishing reports on educational quality based on national achievement assessments. *Mexicanos Primero* even produced its own assessments to show the low levels of English-language learning, and succeeded in positioning the national English-language learning program as a new goal of the Mexican education system (Hevia 2018a; O'Donoghue 2015). In another successful strategy the same organization pursued strategic litigation against education authorities in Oaxaca (Cárdenas 2017). Despite its national standing, Mexicanos Primero does not have a presence at the community level. With the exception of a few efforts to deploy in specific regions and localities by establishing regional chapters, this organization has very little presence on the ground, revealing the huge distance between local demands and needs and the demands promoted by influential civil society organizations.



Teachers and children in Islamabad, Pakistan in innovations organized by ASER-Pakistan. Photo: PAL Network photobank

## Responses from Social Accountability in Education to Overcome these Biases

To summarize, merely providing information does not suffice for educational improvement; the educational accountability model promotes relations of distrust among the actors involved, and local demands for better education have little to do with "national" demands. In this scenario, a social accountability in education approach should focus on two dimensions. First, it should encourage the participation of parents and teachers, and political and educational authorities, in a single front, i.e. foster mutual trust to improve learning. And second, for such an alignment to make sense, it should design and implement strategic actions, rather than tactical actions.

With respect to the first point, it is essential to pursue actions that build mutual trust, and to enable those involved to understand the complexity of the problem and act within their capacities and competencies. Within the educational community this necessarily implies strengthening processes of "professional accountability" (Wilkins 2011) based on the ability of the teachers, as experts in education, to produce the information needed for the assessments and to propose possible solutions. Empowering teachers by valuing their knowledge is fundamental for strengthening relationships based on trust in the school. Similarly, within the schools, as Elmore states: "If [teachers] are given information, in addition to new knowledge and skills, in adequate conditions, that may translate into an improvement in their practice which, in turn, may result in improved academic performance" (Elmore 2010:62). As for parents and citizens, it is essential to go back to the idea that education is a shared responsibility, not only the responsibility of the teacher or school. Accordingly, the motto of the MIA project is "because education is for all, it's my responsibility" ("*porque la educación es de todos, la responsabilidad es mía*"). This requires motivating students, mothers and fathers, and the community at large by showing that every child and adult is capable of learning, and of lifelong learning.

The experience of citizen-led assessments, coming from outside the school systems, may prove useful. Thousands of willing citizens participate in citizen assessments around the world; they want to do something specific for education. In the Mexican case, at MIA for example, after talking with hundreds of volunteers we concluded that there is a diffuse social energy around the education issue; many wanted to "do something" for education, but didn't know what or how. Inviting people to participate is fundamental to make it happen (Lowndes, Pratchett, and Stoker 2006). Volunteer citizens are fundamental for citizen-led assessments, not only for financial and logistical reasons, but above all because they are the ones who build collective action in favor of education, where we can channel the diffuse but real social energy that wants to get involved beyond pitching in cash donations so that the school can be painted. When these volunteers are also teachers or teachers in training, this approaches can generate parental trust towards teachers, too.

Using citizen-led assessment, evaluating learning is the point of entry for those citizens who can and want to participate in specific actions to improve education in their communities, both in and out of school. An evaluation of Pratham's activities, in India, showed that providing information using a scorecard had much less of an effect on learning than organizing summer courses in which, in a collaborative and participatory approach, children learn to read (A. Banerjee et al. 2010). In Uganda, Mexico, Pakistan, and India actions have been pursued that link "evaluation and improvement" as a fundamental way to ensure evaluation results make sense and are useful for designing and implementing actions that improve the capacities and skills of all children and adolescents.

In some cases actions for educational improvement make it possible to project citizen voice to monitor, criticize, and modify pedagogical practices within the schools, an issue on which civil society has little voice. This is the case of the innovative pedagogical strategies called Teaching at the Right Level, which have proven to have major effects boosting reading and math skills. The approach has been fundamental for improving scores and has been scaled up through processes of vertical integration in several of the states of India (A. Banerjee et al. 2010, 2016, 2017).

The pedagogical proposal of teaching at the right level emerged from an analysis and systematic monitoring of the curriculum in India over the past 20 years (Banerji 2000).The approach has made it possible to project voice in curricular improvement with viable and proven alternatives that allow for learning-focused consequences.[35]

Similarly, evaluations must be incorporated to the actions in order for citizen participation aimed at improving education, thereby generating indicators to be able to improve those interventions. A recent statistical review emphasizes the need for more evidence on educational innovations produced in civil society to improve learning (Spier et al. 2016).

As for the second point, it is key to generate strategic actions that supplement access to local information with policy monitoring throughout the chain of command, and the capacity to change courses of action. Accordingly, local actions—involving monitoring and educational improvement—must be supplemented by proposals and public policy recommendations tied to



Public hearings in Andhra Pradesh, India. Photo: authors

factors that impact learning and that inhibit the "elitization" of social participation in education. Following a general proposal for citizen monitoring (Hevia 2016b), this implies, first, selecting strategic policies to be monitored.

The goals of education—individual, social, and in terms of preparing students to get a job—and the factors that impact educational achievement point the way to a fundamental road map. With a clear understanding of the relevance to learning of the policies to be monitored, second, one must proactively articulate local and national actions for advocacy, participation, and citizen oversight by building alliances of community, local, regional, and national organizations. While this is no easy task, there have been successful experiences, such as the monitoring of textbooks in the Philippines (Fox, Aceron, and Guillán 2017).  In our experience, the clearer the policies, the greater the likelihood of success. For example, policies to support reading related to the low level of reading comprehension found in MIA's assessments in Mexico dictate that one must first establish a network of

organizations to evaluate the territory; in southeastern Mexico we work with as many as 80 different organizations when we take our measurements. Third, one must define a clear series of indicators to be monitored. There is governmental information, such as the System of Information and Educational Management (Sistema de Información y Gestión Educativa (SIGEV)), yet it has serious limitations when it comes to its use and improvement (Vázquez Cuevas 2017), and it does not have useful information for monitoring pedagogical policies, but rather is geared to data on inputs and context.

Finally, the monitoring of these indicators must be inclusive and preferably non-contentious at the local level: schools, rather than being responsible because textbooks do not reach the classrooms, or that support does not reach children at risk of dropping out of school, are victims of bad decisions made in other instances. The results of such monitoring should explicitly seek to build mutual trust: hence the importance of the participation of those involved in order for these instruments to enjoy legitimacy and be effective.

# V. Towards an Expanded Concept of Social Accountability in Education: Challenges and Pending Agendas

As discussed in the previous section, an initial major conclusion of this comparison is that we have to look at more than the tip of the iceberg. The concept of educational accountability has a number of biases focused on the symptoms more than the causes of the structural problems related to low educational levels. These biases include reducing the criteria of success of the educational policies to the results of standardized assessments, neglecting students' characteristics and socioeconomic monitoring indicators, the focus of sanctions on the last link in the chain of interaction—teachers and schools—affecting that educational community as a whole, and difficulties mobilizing citizens around the demand for better education.

Therefore, a broad model is proposed that we call "social accountability in education" and that is explicitly set forth in a human rights paradigm. In particular, this perspective seeks to have the design, implementation, monitoring and evaluation of social protection systems, including education systems, guided by the principles of equity and non-discrimination, which include accessibility, adaptability, acceptability, adequacy, incorporation of gender analyses, participation, transparency, and accountability (Sepulveda Carmona and Nyst 2012).

From this perspective, the mechanisms of social accountability in education not only become accessory elements of an education policy, but also make it possible, first, to



Presentation of MIA results and PAL conference, Xalapa, Veracruz, Mexico, 2017. Photo: MIA photos bank

make use of legitimate claims-making mechanisms, and second, to receive a series of reparations in the event that violations of those rights are found, as we will see next.

The social accountability in education model is based on three principles: defining broad and fair criteria for the success/failure of education policy; identifying persons responsible, responsibilities, and sanctions that include the diversity of factors that come into play in teaching-learning processes; and the active involvement of citizens and communities to succeed when it comes to children and youths continuing to learn throughout their lives.

## Accountability with Respect to What? Outcomes, Context, and Inputs

As we saw, the first principle includes a broader understanding of the aims of education beyond standardized test results, as well as using measurements and assessments to generate formative feedback for all the parties involved. The immense effort that is being made to generate comparative data on learning requires clearly communicating how those results are tied to improvement at the local level, outside and inside the classroom; how students and parents can use this information to motivate to take advantage of their opportunities, to develop systems to provide early support for those students who fall behind in their learning. Without this twofold effort to expand the focus of the assessments to other educational aims and make explicit the ties between assessment and educational improvement, one runs the risk of reproducing the bias of educational accountability and focusing exclusively on standardized test results as the only criterion of educational success.

More specifically, the agenda of social accountability in education can be geared to three major dimensions—outcomes, context, and inputs—that have received less attention than policies focused on teachers, and that have a greater potential to involve citizens in the change that is needed. Some specific proposals of this agenda can be found in Table 3.

## Who Should be Held Accountable: Chain of Command and Responsibilities

As regards the second principle, actions informed by social accountability in education have to be characterized by those factors that favor equity and quality in education systems. There is enough evidence that shows greater returns for efforts to improve students' capacities and motivations to learn, to diminish the weight of socio-economic context by adopting compensatory policies and affirmative actions, and to have more compassionate schools and teachers. We must understand and assume shared responsibilities that we have as a society for education, and seek the commitment and involvement required to carry out transformations needed for a rupture with the structural causes, thereby reaching beyond the symptoms. As illustrated in Table 2, there are any number of governmental and nongovernmental policies and programs geared to reducing the weight of socioeconomic context, expanding students' capabilities, and improving the pedagogical, technical, human, and financial inputs to build more compassionate schools, with a climate that supports the motivation to learn. In this respect it is vital to understand the complete chain of command in order to identify persons responsible and sanctions that are not limited to the last link, and to understand that to date the political and educational authorities have largely avoided any accountability when it comes to implementing policies and programs needed to address the factors for which they are responsible.

In this chain, and using the mechanisms for making claims allowed by a human rights perspective, at least two recent experiences exemplify who can be held accountable using this approach. One has to do with the adoption of the Abidjan Principles (The Abidjan Principles 2019), which explicitly incorporated claims making and reparations mechanisms, including the possibility of litigation, as tools to be used in a social accountability in education approach. Another example is the right to education index (Results 2019), where various organizations with a national and local presence can supplement their actions from a rights-based approach, drawing on the official reports of the United Nations High Commissioner for Human Rights, to expand monitoring and oversight of the content of the right to education.

## Who Should Seek Accountability: Citizen Involvement and Vertical Linkages

With respect to the third principle, an approach informed by social accountability in education should include clear and coherent proposals to encourage the participation of children, parents and teachers, as well

**Table 3. Dimensions and Actions of Social Accountability in Education**

| UNESCO Dimension of Educational Quality | Actions of authorities, society, school communities, and civil society organizations |
|---|---|
| Outcomes | • Promote equity in access and educational outcomes: that all students achieve the learning objectives and their maximum level of development no matter their class or culture, promoting access to and retention in the educational system.<br>• Guarantee relevance to promote significant learning, according to social requirements and personal development, and educational aims that represent the aspirations of society at large.<br>• Ensure pertinence: education should include the contents that individuals need to develop in every sense.<br>• Monitor the effectiveness of learning: ensure achievement of the minimal objectives planned in the school curriculum.<br>• Reduce falling behind in education and learning lags.<br>• Generate formative feedback for all parties involved, using educational assessment for formative purposes. |
| Context | • Promote the equity and effectiveness of the education systems to reduce the weight of context.<br>• Design actions to reduce regional inequalities and gender and ethnic differences.<br>• Expand the participation of educational communities to reduce the gap between assessment and educational improvement, in school and out of school.<br>• Design and implement educational and social policy to reduce the weight of context on learning outcomes.<br>• Promote government coordination of education policy and social policy to reduce the weight of context. |
| Students' characteristics | • Improve students' attitudes to education and school.<br>• Supervise and stimulate actions for increasing children's motivation and disposition of children to learn.<br>• Facilitate inclusion of persons with disabilities. |
| Contributions of material and human resources | • Bring about more inclusive, motivating, and compassionate schools.<br>• Keep an eye on school infrastructure facilities and access to educational materials.<br>• Track budgets of policies and programs related to learning. |
| Teaching/learning processes | • Monitor actual time given to learning.<br>• Promote initial and continuing education and training of teaching staff.<br>• Analyze teaching methods and class size.<br>• Evaluate pertinence of curricular model. |

*Source:* By authors, based on UNESCO (2004) dimensions of educational quality.

as political and educational authorities, in a single front fostering mutual trust to improve learning. Second, it should include strategic actions that supplement access to local information by monitoring policies at every point in the chain of command, and foster the capacity to change courses of actions. Of particular importance on this point is proactively articulating local and national actions for advocacy, participation, and citizen oversight by building alliances of community, local, regional, and national organizations.

On this point, the innovative and collaborative experience of citizen-led assessments and the People's Action for Learning Network may provide interesting ways forward. One of the pillars of citizen-led assessments is volunteer work. Researching the narratives of the volunteers who work with MIA (Hevia and Vergara-Lope 2019), it was discovered that the university students and volunteers were motivated by the opportunity to participate in an activity limited in time, with a clear purpose and with precise instructions; they express a clear intent

to get training in research. Yet experience shows more motivations to take action: The volunteers' accounts emphasize that visiting homes where many children who go to school do not have a good grasp of what they read, or know how to add but not to subtract, was one of the most significant lessons from their participation in this project. In this way, institutions and individuals who have become involved in measuring learning take a particular interest in the education of children and adolescents, which is reinforced when one thinks of one's own children, siblings, and neighbors and the urgent need to contribute somehow to a substantive improvement in their basic skills such as reading and math.

Many of our volunteers were young persons whose perception of the education they have received in the basic education schools is still fresh, coinciding with their desire to "do their bit" for education to improve. In a context such as Mexico, where volunteer work is rarely institutionalized, MIA's experience is gratifying and builds trust in civil society participation to solve problems that affect society at large. So, there are other forms of citizen involvement through volunteer work beyond common solidarity activities that Mexicans (specifically parents) carry out around education, such as helping out at the school at the beginning or end of the school-day, or maintaining the buildings and furniture (Butcher and Verduzco 2016).

This social energy is fundamental for strengthening actions for social accountability in education since, first, it generates the necessary "demand" through citizen education and the involvement of hundreds of people, from a perspective of trust and collaborative work; and, second, it translates into citizen monitoring actions at the



Presentation results parents, Xalapa, Mexico, 2018. Photo: MIA photos bank

**Box 1.** How MIA Includes Actions of Social Accountability in Education

The MIA project's change theory seeks to improve basic learning in children and youths through innovation, citizen participation, and collaborative work. To that end, we developed a strategy that we are implementing as of 2019-2020 that consists of projecting citizen voice for educational improvement by articulating three processes: (1) generate independent data that show the intensity and seriousness of the learning lag in the states of southeastern Mexico; (2) design, implement, and evaluate educational strategies that can be reproduced inside and outside the classroom; and (3) implement citizen monitoring of education policies aimed explicitly at improving reading and math, namely the Program to Foster Educational Quality and the National Textbook Policy (Hevia et al. 2017). The participation of volunteers, facilitators, and educational communities in the first two processes generates a critical mass of persons interested in learning that it makes it possible, first, to complete the monitoring of education policies down to the local level, reviewing in each school how policies for fostering educational quality and quality textbooks are (or are not) being implemented, and at the same time offering real alternatives with strategies that make it possible to improve learning.

With this we want to resolve the main limitations that affect the main institutional systems of social oversight: First, being able to monitor independently and vertically, at the school level, the education policies for addressing the problem of the basic learning lag. We have generated a model for monitoring the vertical change in the federal government and the state governments (MIA 2017), but it is very difficult to determine the resources aimed at resolving this problem at the school level and how they are used. Constructing a critical mass of volunteers in the territories interested in improving learning makes it possible to reach the "last mile," the schools that are furthering actions for educational improvement, maintaining the focus on learning and more than on the inputs: more than overseeing to see whether the school is painted, it is proposed to monitor whether the school library has enough books, and books relevant to the children's interests, and that can be borrowed and taken home.

Second, perhaps most important, articulating the voluntary actions for participation makes it possible to give meaning to the actions to monitor the budget, given that we seek to connect the interests of the educational community—associated with their children's learning—with the interests of MIA and other organizations that promote citizen oversight to project citizen voice. Mindful that it is possible to improve basic learning through short and low-cost educational interventions that require access to relevant printed materials for the children, it makes sense to demand better school libraries. Similarly, if we show that there are major lags in math and the Mexican education authorities do not put in place a national or state program to address the lag, it makes sense to demand of the authorities a policy for improving the teaching-learning process in math.

Third, articulating citizen monitoring of substantive policies and the results of independent assessments on learning with the design and production of educational interventions offers alternative "solutions" that are proactive and viable, such as implementing the pedagogical strategies developed by MIA that go beyond filing complaints with the established systems for responding to citizens. Having effective strategies for improvement that we can share free of charge with school communities makes it possible to expand the society-school interaction to processes of co-construction, such as implementing reading clubs, or joint initiatives by the parents' association and the principal to gain access to state programs for fostering quality education.

local level that are not contentious, but collaborative, allowing for vertical articulation with the other components of the "macro" monitoring of education policies. As the case of MIA shows, there are opportunities to undertake voluntary actions and set this energy in motion, directly in activities to assess basic learning through clear instructions and specific tasks.

Similarly, the experiences of Pratham in India, to get volunteers in localities who take responsibility for strengthening actions to improve reading and writing, have surpassed expectations in terms of society's interest in becoming involved in education, in a formative and productive way, beyond chipping in a cash donation or supervising to check whether the school is clean or

painted. Such initiatives can be built upon for communities to mobilize to demand better educational services if such demands are geared to improving learning.

## Challenges for Those Interested in Strengthening Social Accountability in Education

The agenda for developing and implementing the social accountability in education model poses a series of challenges to the learning community about accountability. Two specific audiences can be identified: experts in educational accountability, and experts in social accountability in areas other than education. Each face specific challenges.

On the one hand, for experts in educational accountability, a first challenge is to identify and deconstruct the biases identified, and others not yet characterized. Our intent is not to repudiate the importance of these efforts for overcoming the learning crisis nor to ignore the strides already made, but to indicate how the biases have consequences and how a social accountability in education agenda can be created that is more geared to the structural causes, more balanced in identifying the persons responsible, responsibilities, and sanctions, and that requires fewer efforts to mobilize the population to demand better education. In this sense, it is necessary to continue standardized assessments and clearly identify the responsibilities of teachers and schools, so long as these assessments are formative, are more clearly tied to improving learning and valuing the individual and social goals of education, and are not useful merely for keeping tabs on teachers and as an excuse for the deregulation and eventual privatization of public education systems.

Educational research has generated sufficient evidence and recommendations to strengthen the focus on students' capacities, the construction of more compassionate schools, and the design and implementation of affirmative policies that diminish the enormous weight of socioeconomic context, addressing issues that are rather marginal in the international community dedicated to social accountability in education, which continues to be focused disproportionately on teacher training and teacher selection policies.

On the other hand, the main challenge for experts in social accountability in fields other than education is to understand that accountability for education is shared, there is no "single" person or entity accountable: it is not (just) the teachers, schools, political authorities and/or the inadequate provision of educational materials that cause low educational levels. In this sense, the challenge is to design "theories of change" that make it possible to distinguish how and of whom one can demand accountability for the success or failure of policies (beyond standardized test results) with the interaction of students, teachers, principals, local and national political authorities, donors, society at large, CSOs, academia, etc., and where we all have a responsibility to assume.

# Endnotes

1.  For some examples of introducing participation and accountability mechanisms in health, see Boydell et al. (2018), Juárez et al. (2016), Nelson, Bloom, and Shankland (2018); for fighting poverty, see Ayliffe, Aslam, and Schjødt (2017), Bassett et al. (2012), UNDP and UNICEF (2011).

2.  For examples of international partnerships that foster participation and accountability in education see GPE (2018); GPSA (2018); for examples of international agencies, see Holland (2017); for examples of UNESCO bodies, see International Institute for Educational Planning (IIEP) (UNESCO 2018a). For examples of donor agencies, see the Global Development and Population program (Hewlett Foundation 2018).

3.  For problems implementing social accountability actions see Banerjee et al. (2010), Fox (2015), Hevia (2015, 2018b).

4.  For some examples of the effects of educational accountability globally, see Gershberg, González, and Meade (2012a); di Gropello (2004); Hanushek and Raymond (2004). The case of Chile may be paradigmatic in this respect. See Atria 2014; Bellei 2015; Falabella and de la Vega (2016).

5.  See on page 20: "Effects of educational accountability on the educational community."

6.  For analysis of the discussion on the effects of charter schools and the No Child Left Behind Act see (Anderson (2005); Giersch (2012); Peterson and West (2003); Wells, Slayton, and Scott (2002). For the case of Chile and the demonstrations against schools for profit, see Atria (2014) and Bellei (2015).

7.  One example of this in the United States is the Pearson group and the discussion with respect to the Common Core Standards (Simon 2015; Tampio 2015); some studies of PISA for Development point to similar results (Addey 2017).

8.  For a critique of the effects of the policies for evaluating performance on the education systems see Aboites (2012); Ravitch (2011); Sánchez (2014).

9.  For a discussion of the political nature of the concept of social accountability, see Ayliffe, Aslam, and Schjødt (2017); Fox (2015, 2018); Joshi and Houtzager (2012).

10. With respect to the democratic deficit see Joshi and Houtzager (2012); McGee and Gaventa (2011). On spatial metaphors, see Goetz and Jenkins (2001); Isunza Vera (2006); O'Donnell (1998); Peruzzotti and Smulovitz (2006). On anti-corruption strategies see Baez-Camargo and Stahl (2016); on new social movements see Almén and Burell (2018), among other issues.

11. See, for example Bain et al. (2005); Bassett et al. (2012); World Bank (2016). Comparing the World Bank and OECD concepts, Caddy et al. propose a system for classifying ultimate objectives into three types: scrutiny, proximity, and engagement. Scrutiny initiatives aim to improve the evaluation, analysis, and review of the government actions. Proximity initiatives aim to reduce the "distance" between citizens and the government, and to identify citizens' needs and preferences. Engagement initiatives aim to incorporate citizens into the decision-making process Caddy, Peixoto, and McNeil (2007:8-11).

12.  Multiple social accountability actions have been deployed in fields such as health (Balestra et al. 2018); budgets and fighting poverty in Africa; policies and planning, revenues, budgets, spending, and provision of services (McNeil and Malena 2010a); social protection and social assistance in Africa (Barrett 2008; Brownie 2014); and the use of protests in China as social accountability mechanisms (Almén and Burell 2018).

13.  Various analyses have been done to understand the effectiveness of social accountability. See, for example: Brownie (2014:1); Fox (2015); Rocha Menocal and Sharma (2008;x-xi), Fox (2015); Fox, Aceron, and Guillán (2017); Grandvoinnet, Aslam, and Raha (2015), Joshi (2014).

14.  Interaction mechanisms (Ayliffe, Aslam, and Schjødt 2017), economic demands (Balestra et al. 2018), importance of context (Baez-Camargo and Stahl 2016; Caddy, Peixoto, and McNeil 2007, 5; Rosie McGee and Gaventa 2011, 19; McNeil and Malena (2010b:188); Rocha Menocal and Sharma (2008:5).

15.  Examples of short route/long route in education may be found in Bruns, Filmer, and Patrinos (2011); di Gropello (2004); Meade and Gershberg (2008).

16.  For a discussion of the concept of holding accountable, see Cunill (2000).

17.  For more information, see Adams (2017); Peterson and West (2003); Wells, Slayton, and Scott (2002).

18.  For example, Puryear identifies five elements of any system of educational accountability: standards, information, consequences, authority, and capacity (Puryear 2006; Winkler 2006).

19.  There are differences in the number and type of indicators of the quality of education reported by the literature. For discussion in Latin America, see for example (Bonilla 2014; Braslavsky and Cosse 2006; Meza 2008).

20.  One clear indicator of this turn can be observed in the centrality of education coverage in the millennium development goals, and the emphasis on the quality of learning one finds in the sustainable development goals (UNDP 2015, 2018b).

21.  For more discussion on the use of the assessment in Latin America and the Caribbean see Iaies (2003); Martínez Rizo (2008); Meza (2008).

22.  On the PISA Effect, see (Busso and Ambrus (2016); Engel (2015); Font et al. (2009); Grek (2009); Hanberger (2014).

23.  Criticisms of the effects of simplification in Bogotch, Mirón, and Biesta (2007:97); doubts as to the validity of the results (Torrance 2017); the curtailing of study plans (Herman, Aschbacher, and Winters 1992, 5-6); various effects on school and motivation (Schneider, Feldman, and French 2016, 67); increased anxiety of students (Huerta-Macías 2002, 338); reduced motivation for learning (ARG 2002, 2); the lack of correspondence among the contents of the test, the study plan, and teaching (Herman, Aschbacher, and Winters 1992, 5-6; Shepard 2006).

24.  In this regard see (CCSSO 2014; Cochran-Smith et al. 2018; Darling-Hammond 2014). The discussion of the new education law known as the Every Student Succeeds Act (2015) is revealing of much of the new academic debate on the measure of success of an education policy (Darling-Hammond et al. 2016; Strobach 2018), criticizing the scant value they contribute to the schools if not accompanied by investment in human resources and school leadership (Elmore 2010).

25.  For example, the Jànadoo project in Senegal has worked on caring for the environment (Lartes-Ifan 2018) and the MIA project in Mexico has developed instruments to evaluate the handling of emotions and care of the body (Vergara-Lope, Hevia, and Velázquez 2019).

26.  In this respect see (Darling-Hammond et al. 2016; Strobach 2018). On new measurement instruments see (Bae 2018; Stosich, Snyder, and Wilczak 2018); on orientation to learning, see (Gebril 2018). On the importance of extra-school knowledge see (Bourke, O'Neill, and Loveridge 2018). For empirical examples of how to redesign these instruments in various states of the United States of America, see the following; Virginia (Haun 2018), Massachusetts (French 2018), California (Bush-Mecenas et al. 2018), Vermont (Fowler 2018), Tennessee and Ohio (Hillman, Hicklin Fryar, and Crespín-Trujillo 2018).

27.  These arguments are developed, for example, in Mexicanos Primero (2012a); OECD (2012); Sanches and Jacinto (2014); Santiago et al. (2012); Vegas (2005); World Bank (2018).

28.  On average across OECD countries, a socioeconomically disadvantaged girl who lives with her single-parent family in a rural area, has an immigrant background, speaks a different language at home from the language of instruction, had not attended pre-primary school, had repeated a grade, and is enrolled in a vocational track has an 83% probability of being a low performer (OECD 2016, 13-14).

29.  The specific recommendations for improving education systems in Latin America and the Caribbean are: replace the mechanism of holding students back; expand education to include preschool education; ensure parent participation and support for vulnerable students; adopt policies and practices for gender equity; adopt policies and practices for equity as between indigenous and non-indigenous students; take measures to palliate the impact of socioeconomic inequalities on academic achievement; develop programs that reinforce classroom strategies and practices; have individual educational materials in the classroom; strengthen the programs for initial teacher training; support vulnerable students and the schools they attend; improve the targeting of educational and social policies; strengthen teaching capacities and educational management for the harmonious development of the students; ensure equity in access to school and retention in school for greater social inclusion and development of social capital in the school environment (UNESCO 2015).

30.  The specific recommendations of the OECD are:  Take down the multiple barriers to learning; create demanding and supportive learning environments in school; provide corrective support as soon as possible; foster the participation of parents and local communities; inspire students to make the most of available education opportunities; identify lower-performing students and design strategies to adapt policies; provide support directed to underprivileged schools and/or families; offer special programs for immigrant, minority, and rural students; address gender stereotypes and help single-parent families; reduce inequalities in access to early education; and limit the use of the classification of students (OECD 2016, 15).

31.  In this respect, see 10 por la Educación (2016); CCAE (2014); Mexicanos Primero (2012b, 2012a).

32.   On the unintended effects of tests on teachers see Adams (2017); Day and Smethem (2009:142), on the effect on personal identities see Day and Smethem (2009), on scant participation in the decisions that affect them see (Murphy 2018). "In other words, this accountability regime provides the infrastructure to keep a constant gaze on local school happenings, including teacher performance, allowing bureaucratic and non-bureaucratic bodies to govern schools from a distance (Rose 1999a; Ball 2003, 2008; Lingard, Creagh, and Vass 2012). Simultaneously, it also provides the metrics against which teachers can measure themselves, situating them within perpetual states of comparison against their peers and former selves to be more 'effective' and 'excellent'" (Ball 2015, Holloway and Brass 2018:2).

33. *Campaña Latinoamericana del Derecho a la Educación* (CLADE) and *Consejo Latinoamericano de Ciencias Sociales* (CLACSO) in Spanish.

34. On the negative impact of educational accountability on youths of color in California see Abrica (2018). On deterioration of the school climate and increased workplace stress see Ball (2003); Easley II and Tulowitzki (2016); Greany (2016); Saeki et al. (2018).

35. Something similar happens in Pakistan, where ASER-Pakistan is leading citizen assessments and, with these results, generates educational interventions that make it possible for more children and adolescents to be able to read and perform calculations (Jamil and Saeed 2018).

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