



# Educational change as social movement: an emerging paradigm from the Global South

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## Abstract

This paper advances the notion of *social movement* as a new way to think about and pursue educational change. It articulates a critique to scientific management, the paradigm that has shaped how schools and educational systems have been understood and run for over a century, since the creation of compulsory schooling. Drawing on some examples of radical and widespread pedagogical change in the Global South, the author proposes the notion of social movement as an alternative paradigm with a fighting chance to override scientific management as the dominant paradigm for educational change. The article concludes with remarks on the possibilities for the new paradigm to make its way into educational systems in so called developed nations.

**Keywords** Educational change · Social movements · Pedagogy · Global South · Scientific management · Paradigm change · Whole system reform

## Introduction

Ideas are powerful forces. They shape how we make sense of the world and how we act on it (Kuhn 1970). They delimit what we believe is possible and desirable (Foucault 1970). For over a century, one particular set of ideas has shaped in profound and pervasive ways how we think about and run schools and educational systems. This set of ideas is *scientific management*, a paradigm that emerged in the wake of the industrial revolution in the early 20th century. At a time when mass production and efficiency were considered key forces for economic growth and prosperity, scientific management was a revolutionary idea. It proposed that the best way to organize human activity was to break down complex work into small, repetitive

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The ideas in this article are taken from and further developed in Rincón-Gallardo (2019).

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and routine tasks, with external incentives to ensure adequate execution of the work (Mehta 2013; Pink 2009).

Along with many other organizations, schools and school systems were profoundly shaped by the ideas of scientific management. Organizing students by age, breaking down the day in timed blocks with each group following instructions from the adult in the room, and creating external incentives such as grades became, and continue to be, defining features of schools and school systems.

The triad of standards, testing and accountability represents the most recent manifestation of scientific management in education reform (Mehta 2013). The idea that system-wide school improvement is best achieved by rationalizing school activities through principles of scientific management took a strong hold and continues to be the dominant logic for education reform in the United States and beyond. Sahlberg (2011) has referred to the spread of scientific management across educational systems around the world as the Global Education Reform Movement, or GERM.

Standards, testing and accountability have tremendous appeal for politicians across the political spectrum, for system leaders and multiple stakeholders. Alluring as they are, however, their main drawback lies in their failure to produce their intended results (Mehta 2013). Fullan (2011) has referred to this problem as “choosing the wrong drivers for whole system reform.” Drivers are policies or approaches to educational change intended to cause improved student outcomes. Fullan calls “wrong” drivers those that do not produce their intended results, and identifies four of them: external accountability, technology, individualistic solutions, and ad-hoc strategies. Right drivers, on the other hand, have proved effective in improving student learning outcomes. They are: capacity building, pedagogy, collaboration, and “systemness” (that is, solutions aimed at affecting the whole system, or big chunks of it).

The wrong drivers are easy to act on: they can be legislated, be stated simply and clearly, and appeal to the larger public. In contrast, the right drivers are relatively vague and have to be developed, and often less appealing to the public. Pursuing the right drivers requires developing clarity and specificity about what they look like in practice along with the conditions to enable their spread across entire educational systems. But this will not be enough. If used within the logic of scientific management, the effectiveness of the right drivers will be limited. To reap the power of the right drivers, a new paradigm for educational change is necessary.

## The need of a new paradigm for educational change

The invention of mass compulsory schooling responded to the needs of the industrial revolution, which brought waves of immigration from the country to cities to work in the new factories (Mehta 2013; Tyack 1974). The industrial society required a place to send the kids while adults were working. It needed a way to ensure some social order and prevent the chaos that the arrival, fast and *en masse*, of new people to the cities could bring. And it required mechanisms to sort out students and select the future managers. These three functions—custody, control, and sorting—constitute, and continue to be, the historical role of schools.

Fast forward to today. The world is a mess. Climate change, the looming threat of nuclear war, abysmal inequalities, mass global migrations, the erosion of democracies, the rise of fundamentalism and violence, are all deeply worrisome trends that threaten humanity and the very existence of life in the planet. There's growing consensus about the need to reimagine schools and school systems so that they prepare our younger generations to survive, thrive, and change the world for the better. Collaboration, creativity, citizenship, character, communication, and critical thinking are emerging as the new set of competencies that young people will need to be prepared to cope with and shape the future (Fullan et al. 2017; Wagner and Dintersmith 2015).

This all sounds good. Yet we face a massive challenge: Cultivating these new competencies in organizations and systems that were *not* designed to do this. The institutional culture and power relationships that have defined the *grammar of schooling* (Tyack and Cuban 1995) for over a century, are not only inadequate, but also get in the way of the kind of learning that young people need to cope with, find meaning in, and change the world they're inheriting from us. Some distinguishing features of the grammar of schooling include a top-down separation between teaching and learning, with authority and control concentrated in teachers; a focus on covering content at the same time and pace for the whole group; a prioritization of covering content over ensuring student understanding; and the use of external incentives (grades, test-scores, external accountability measures) to secure compliance. These cultural features are adequate for the purposes of custody, control and sorting that schools have historically fulfilled. They are good to manage large numbers of students and schools. They are well suited to foster compliance and predictability. But they are counterproductive to the mindsets and behaviours that are required for the future.

Turning schools and school systems into vibrant places for learning and living examples of the societies we aspire to become requires a cultural shift of massive proportions. As Pink (2009) points out, schools, as many other organizations in contemporary societies, were designed under assumptions about human motivation that contrast with more recent knowledge about human behaviour. The dominant "operating system" of many schools and workplaces assumes that work is inherently boring and unfulfilling, and therefore has to be stimulated through extrinsic motivators. The *carrots-and-sticks* approach is effective for a range of routine tasks, which are far from the rich, complex work that characterizes deeper learning. It even works against its intended purposes, by decreasing internal motivation and crushing creativity.

Complex and unpredictable in nature, learning for the future requires a new operating system built around intrinsic motivation, involving:

- purpose (having a clear end in mind and connecting what we do to something larger than ourselves);
- mastery (getting better at what we do);
- autonomy (having the freedom to determine what, when, how, and with whom we do what we do);

- connectedness (working in connection with others) (Pink 2009; Ryan and Deci 2000).

Transforming whole educational systems into vehicles for powerful learning is about stimulating and sustaining widespread cultural change. Throughout history, the most effective agents of widespread cultural change—and in particular, cultural change that moves us closer to our human condition—have been social movements (Rincón-Gallardo 2019; Rochon 1998). Social movements offer a powerful metaphor for a new paradigm with strong chances to override scientific management as the dominant way to think about and pursue educational change.

### Three prior attempts to override scientific management

Since the emergence of compulsory schooling, there have been attempts to critique, counterbalance, or replace scientific management as the dominant paradigm for educational change. Yet none has been powerful enough to override it. Here I discuss three such attempts, which I treat as distinct sets of ideas (See Table 1). Each set represents an overarching theme with high relevance for the field of educational field: learning, teaching, and policy development.

The first set of ideas is represented by *progressive education* and *critical pedagogy*. These two schools of thought have developed a sound knowledge base on the nature of learning and the conditions under which it thrives. Progressive educators (Dewey 1938; Duckworth 2006; Gardner 1999; Montessori 1986) and advocates of critical pedagogy (Freire 1970; Duncan-Andrade and Morrell 2008; Hooks 1994) have articulated powerful critiques to conventional schooling. While progressive educators criticize standardization as inadequate and harmful to children's innate desire and capacity to learn, proponents of critical pedagogy highlight the oppressive function of schooling, its neglect of the contexts where the lives of students unfold, and the authoritarian nature of conventional teaching. Both have inspired the creation of exemplary classrooms and schools.

The major shortcoming of these two traditions lies in their failure to become the new normal across entire education systems. Classrooms and schools that are living examples of progressive education and critical pedagogy continue to be isolated bubbles of hope in the midst of a remarkably unchanged schooling landscape. A new paradigm should leverage the rich tradition of progressive education and critical pedagogy, but it must also power the transformation of entire educational systems.

*Teacher professionalism* represents a second set of ideas that has sought to counterbalance scientific management. Its proponents argue that improving schools and school systems requires the recognition, organization and development of teaching as a full-fledged profession (Darling-Hammond and Sykes 1999; Hargreaves and Fullan 2012; Mehta 2013). Over the past couple of decades, calls for teachers' control of their own professional practice have often focused on the development and power of collaborative cultures (within schools, between schools, and between school systems) to improve instructional practice, change the culture of schools, and develop more coherent systems (Datnow and Park 2019; Hargreaves and O'Connor 2018; Rincón-Gallardo and Fullan 2016; Stoll et al. 2006).

**Table 1** Three attempts to override scientific management: merits and shortcomings. *Source*: Rincón-Gallardo (2019)

	Merits	Shortcomings
Progressive Education + Critical pedagogy	Focus on student learning and democracy Critique of conventional schooling	Isolated examples Failure to become the new “normal”
Teacher professionalism	Call for turning teaching into full-fledged profession Transfer of power and authority to educators	Failure to appeal to/include wider sectors of society Silent re: learning for the future and democracy
Sense-making/co-construction	More adequate explanation of policy implementation and educational change	Silent re: purpose of educational change Equally fit to maintain or change the status quo

While the full development of teaching as a profession is crucial for the education systems of the future, teacher professionalism has struggled to gain the support of wider sectors of society. Some groups fear it could undermine the power of parents and communities to hold teachers and schools accountable for the education delivered to young people. Others see the risk of excluding worldviews, cultures and ways of knowing that do not conform to dominant beliefs about what constitutes valid knowledge and skills. Furthermore, teacher professionalism, by itself, does not address two key problems for the future of education: The need to redefine what students should know and be able to do as a result of going to school and the pursuit of democracy as an explicit goal of formal education. Teacher professionalism will be an important aspect of renewing public education, but has not been strong enough to override scientific management as the dominant paradigm for educational change.

A third prominent set of ideas pertains to the *sense-making/co-construction* perspective on education reform, rooted in a rich and wide range of education reform implementation studies (Berman 1981; Fullan 1991; McLaughlin 1987). Proponents of this perspective argue that, rather than a merely technical process that can be rationally managed, education reform is an iterative and complex process that requires the active participation and interaction between multiple actors and contexts (Datnow and Park 2009). The sense-making/co-construction perspective offers a more adequate explanation to the development and implementation of educational change than the technical-rational perspective—inspired by principles of scientific management. As well, this perspective can apply to a wide range of processes of education policy development and implementation. However, it is insufficient to respond to two key questions in need of attention for the future of educational change. The perspective is silent on the question of purpose. And it leaves the question of whether a specific educational change endeavour perpetuates or subverts the status quo unanswered.

As I have suggested, *educational change as social movement* offers an appealing metaphor for a new paradigm with a fighting chance to override scientific management. It is at the same time compatible with the most important contributions of the three sets of ideas just discussed and addresses several of their shortcomings. While grounded on the philosophy and practice of progressive education and critical pedagogy, *educational change as social movement* offers a theory of action to transform entire educational systems, not just individual schools. It embraces and acknowledges the fundamental role of a full-fledged teaching profession while including—and likely appealing to—a wider range of actors, including students and advocacy and community organizing groups. It builds on the notion that educational change is a complex, multi-directional phenomenon shaped by a multiplicity of actors, while offering a specific, compelling purpose for educational change and deliberately seeking to fundamentally change the status quo.

What's perhaps most important, the notion of *educational change as social movement* is not simply a theoretical elucubration, but rather emerges from efforts to explain existing examples of widespread pedagogical change that have already started to emerge around the world. These examples don't come from the places where the educational change field has been looking—in so called “developed” economies. They come from the Global South—the regions of the world that share

a history of colonialism, often called “developing countries” or the “Third World.” (Farrell et al. 2017; Leadbeater 2012).

## A new paradigm emerging in the Global South

Paradigm shifts occur as scientific revolutions, rather than through incremental additions to existing knowledge (Kuhn 1970). They usually start with the emergence of “anomalies” that contradict or cannot be explained by the existing paradigm. New paradigms reconstruct prior assumptions and re-evaluate prior facts in ways that integrate “anomalies” into coherent explanations on how the world works. When a paradigm shift occurs, a community of knowledge starts to think about and act on the world in an entirely different way.

In education, there are many signs that scientific management is inadequate to explain or effectively drive educational change. Over four decades of policy implementation studies provide mounting examples of ‘anomalies’ to the scientific management paradigm. Look at almost any attempt for education reform and you will find tremendous gaps between intentions and results.

The Global South offers a rich source of ‘anomalies’ of another sort. These anomalies are examples of successful initiatives of widespread pedagogical change that have fundamentally transformed teaching and learning in schools serving historically marginalized communities, doing it at scale (hundreds or thousands of schools), and achieving measurable improvements in student outcomes, at a faster pace and sometimes surpassing the achievement of schools serving more privileged students (Farrell et al. 2017). These include the Learning Community Project (LCP, also known as Tutorial Networks) in Mexico (Rincón-Gallardo and Elmore 2012; Rincón-Gallardo 2016), Escuela Nueva in Colombia (Colbert and Arboleda 2016; Schiefelbein 1993), Activity Based Learning in the Southern State of Tamil Nadu in India (Niesz and Krishnamurthy 2013, 2014) and Community Schools in Northern Egypt (Zaalouk 2006). While developed independently from one another, these cases share several features in common, including:

- focus on learner-centred pedagogies;
- emphasis on serving remote and historically marginalized communities;
- roots in local culture and history;
- emergence as grassroots efforts
- evolution into large-scale policies, with access to institutional power.
- deliberate efforts to change relationship between central leadership and schools; and
- success in improving student outcomes, even though raising standard measures was not a central aspect of the strategies.

What makes these examples anomalies? They defy conventional definitions of education policy. They are more similar in their genesis and development to social movements than to conventional education programs or policies. Indeed, at least three of the four cases have been described as social movements at different

moments in time by different scholars who, until recently, were not aware of each other's work (See Niesz and Krishnamurthy 2013, 2014; Rincón-Gallardo and Elmore 2012; Zaalouk 2006). They advance fundamental changes in dominant patterns of social interaction. In particular, they are redefining how adults and young people interact in classrooms, and how policy and practice interact with each other (through horizontal relationships of dialogue and mutual influence, rather than vertical relationships of authority and control). They rely on voluntary participation and resourcefulness, and they build collective capacity to mobilize and change what gets in the way of their change efforts.

To be sure, the examples of widespread pedagogical transformation discussed here have their shortcomings (See for example Colbert and Arboleda 2016; Niesz and Ryan 2018; Rincón-Gallardo 2016). All have had stories of scaling-down, sudden marginalization from the educational systems where they operate, or bureaucratization of their original and organic pedagogies in many sites; in at least one case the evidence of impact on student outcomes is mixed and inconclusive. However imperfect, in their genesis and development as social movements aimed at fundamentally transforming teaching and learning across thousands of schools lie important keys to a new paradigm for educational change.

## Educational change as social movement

Educational change has to be about cultural renewal that zeroes-in on liberating learning in classrooms and across entire educational systems. Throughout history, social movements have served as the most powerful collective agents of cultural renewal. In their ways of operating lie important clues to redefining how young people and adults interact with each other in schools, and how administrators and educators interact with each other in educational systems.

For the purposes of contrasting social movements and scientific management, I will list down some of the dominant features of each. (See Table 2). The contrast presented here is not meant to suggest a binary split between the two, but simply to identify key features that have more prominence in each. While scientific

**Table 2** Scientific management vs social movement. *Source:* Rincón-Gallardo (2019)

	Scientific management	Social movement
Leadership	Control/compliance Hierarchical	Autonomy/creativity Networked, distributed
Core values	Achievement Efficiency	Learning Efficacy
Core practices	Prescription Mandates External accountability	Dialogue Deliberation Internal accountability
Relies on	External incentives Resources	Intrinsic motivation Resourcefulness
Stance on change	Stability Incrementalism	Cultural renewal Radical innovation



management relies on control and compliance, social movements rely on autonomy and creativity. In scientific management leadership is hierarchical by nature, whereas in social movements it is distributed. Scientific management strives for achievement and efficiency, while social movements prioritize learning and efficacy. Scientific management operates through prescription, mandates, and external accountability, whereas the modus operandi of social movements involves dialogue, deliberation, and internal accountability. Scientific management relies for its success on external accountability and resources, whereas social movements depend on intrinsic motivation and resourcefulness. Scientific management strives for stability, social movements pursue cultural renewal. Scientific management approaches change incrementally. Social movements are revolutionary forces of change.

Scientific management assumes that work is inherently boring and meaningless—and thus the importance of creating external incentives for its execution. The notion of educational change as a social movement leverages the idea that learning can and should be joyful, intrinsically motivating, and liberating. While for scientific management schooling is a technical solution to managing large groups of students efficiently, in the new paradigm education is about igniting the innate capacity of every human being to learn and change the world.

## Concluding remarks

The *educational change as social movement* paradigm outlined here is grounded on examples from the Global South. As Charles Leadbeater (2012) has pointed out, the Global South offers a more fertile ground for radical innovation in education, as in so called “emerging economies” needs are greatest, there is huge unmet demand, and conventional solutions are expensive and ineffective. Whether and under what conditions social movements aimed at liberating learning will emerge in developed economies remains an open question. Yet, there are some considerations that might suggest that educational change as social movement might be a feasible alternative in the Global North.

First, the examples from the Global South developed here are grounded on notions of learning and the conditions under which it thrives that are consistent with what is known about human learning in general, not only in the Global South. Second, the default culture of schooling, as well as its critiques, are remarkably similar across schools and education systems around the world; and there is growing worldwide awareness of the need to fundamentally change how education reform is conceived and pursued. Third, social movements have emerged as important drivers of social change in both in the Global South and in developed economies. While their key strategies and tactics may differ widely depending on their context and culture, movements share in common a quest for developing new patterns of social interaction among groups of unequal power and privilege (when it comes to education, two key patterns of social interaction that need to be fundamentally redefined are the relationship between adults and young people, and the relationship between policy and practice). Fourth, there are already vibrant and growing networks of schools, as well as a handful of school districts organized around liberating learning

in the Global North, with features that are similar to the social movement paradigm outlined here (e.g. Big Picture Learning, High Tech-High, and the Ottawa Catholic School Board in Ontario). And fifth, young people in America and abroad are starting to emerge as a powerful, collective agents of societal change, and it may take only a few connections of ideas and people to bring their attention and their collective power to the quest for liberating learning.

The next two decades might be the definitive time to see whether there is any bright future in sight for educational change. The stakes are high, and it's too risky to simply *wait and see*. Let's instead *go and cause*.

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