



Implementing education reform: IS THERE A “SECRET SAUCE”?

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1. EXECUTIVE SUMMARY

Educationalists have long sought an elusive “secret sauce” for implementing sustainable reforms. They point to innumerable cases of stalled educational change, which waste precious time, resources, and – most troublingly – human potential. The good news, however, is that innovators do not have to reinvent the wheel; there is much to learn from the struggles and successes of their peers around the world. Regardless of whether these insights can create a unified recipe for change, policymakers and practitioners alike would undoubtedly benefit from studying inspiring learnings across contexts.

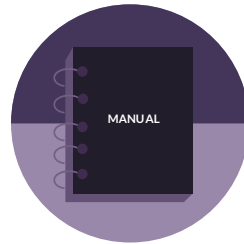
This report explores whether cross-country research can help uncover a “secret sauce” for implementing sustainable education reform. It probes reform journeys across three nations (Finland, Portugal, and Canada) with a thorny question: what are the greatest barriers to, and the key enablers of, sustainable education reform? Analysis of expert interviews and diverse documents reveals five common barriers and three enabling actions, depicted below.

Taken together, these insights form a reflective checklist for educationalists across the globe. With values, practicality, and agency at the forefront of reformers’ minds, they can craft thoughtful, enduring policies that prepare all children to thrive.

Image 1:
Barriers to Change



2. DOMINANT LOGIC
“Why change what works?”



3. PRACTICALITY
“How can this ever work?”

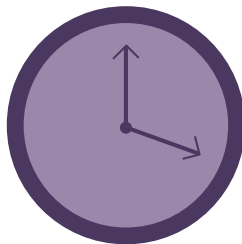


1.
VALUES MISALIGNMENT
“This isn’t what school is about”

REFORM BARRIERS

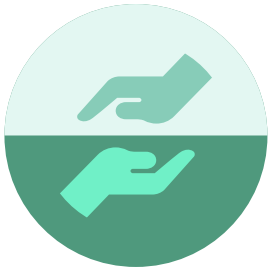


4. CAPACITY
“This, too, shall pass”



5. TIME
“There’s too much to do”

Image 2:
Enabling Actions



**DEFINING AND ALIGNING
COLLECTIVE VALUES**

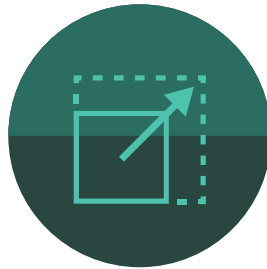
Using participatory
design methodologies

**ENABLING
ACTIONS**



**DEMONSTRATING
REFORM PRACTICALITY**

Building evidence
Modelling practice
Showing alignment



**CULTIVATING
LOCAL AGENCY**

Developing leadership capacity
Empowering educators as classroom experts

2. RESEARCH BACKGROUND

2.1 The Challenge of Educational Change

Education reformers are not suffering from a lack of promising ideas, but they often struggle to make those ideas work in practice.

Education reform is a multibillion-dollar industry, ostensibly seeking to improve the lives of learners across the globe. From Brazil to Bangladesh, from the United States to the United Arab Emirates, public and private institutions pour untold time and energy into programs of curricular change, technological upgrade, and pedagogical innovation. These reforms often fail, and they fail hard. This halting change signifies not simply a practical waste, but a grave injustice. Each unsuccessful project represents days, weeks, and even years of lost learning for millions of young people, with enduring consequences echoing into each child's future.

Scholars have theorized and documented myriad reasons for these failures. Some analyze policymakers' ineptitude, blaming inconsistent and unclear central directives that frustrate ground-level change (Hill, 2014; Mazmanian & Sabatier, 1981). Others have an eye on the classroom, focusing on the decisions and dynamics of individual actors – most often, how teachers resist or enact reform (Ball, 2012; Coburn, 2005). The broader social milieu is often scrutinized with social and cognitive lenses to understand how principals, peers, and parents may hamper implementation (Daly, 2010; Spillane, Reiser, & Reimer, 2002).

That educational reform should be so fraught is certainly not a novel sentiment. For decades, educationalists have highlighted, problematized, codified, and sought to solve this persistent struggle to sustain policy change (Ball, 2015; Fullan, 1993; Hallinger & Heck, 2011; Hargreaves, 2009; Hord & Hall, 2006). These efforts have drawn on overlapping ideas and phrases, from innovation and improvement to reform and change (Winthrop, Barton, & McGivney, 2018). Scholars have worked towards diverse educational ends, such as social justice (Rincón-Gallardo, 2020) and economic advancement (Hanushek & Woessmann, 2010). All the while, they have appropriated countless theories to guide their analyses, including the cognitive (Spillane et al., 2002), relational (Könings, Brand Gruwel, & Merriënboer, 2005), and affective (Hord & Hall, 2006). Change scientists continue to seek empirical evidence to help reconcile this disjoint, interdisciplinary field.

2.2 Supporting Delhi Education Reform

In 2018, the Delhi government launched a bold education initiative: the “happiness curriculum.” This project aimed to support the development of a “better, positive... vibrant society with happy individuals” by providing students with the skills, activities, and environments needed for deep, sustained happiness (State Council for Research and Training, Delhi, 2019). It emerged from a governmental collaboration with five nonprofit organizations, including Dream a Dream, a not for profit based in Bangalore. This group trained 40 mentor teachers in a philosophy known as “co-existential thought.” The educators leveraged their new knowledge in partnership with five non-governmental organizations to design the happiness curriculum (Kim, Talreja, & Ravindranath, 2019). A 30-page policy document established the guiding rationale and pedagogical framework, which included a mix of direct instruction and learning opportunities related to mental health and wellbeing.

The curriculum organized happiness as a discrete subject, with a dedicated daily “happiness period.” During this time, instructors introduced students to stories, experiential activities, and reflection opportunities. It was a space for self-expression without judgement, weaving together empathy-based, experiential, and playful pedagogies (Kim et al., 2019). The ministry articulated the curriculum’s ultimate goal as seeking to “enhance students’ level of awareness, mindfulness and deepen learning to lead a happier and meaningful life” (State Council for Research and Training, Delhi, 2019).

In July 2018, the government launched its Happiness Curriculum in each of the region’s

1,030 K-8 public schools. Preliminary reports proved promising: researchers noticed marked shifts in student and teacher attitudes and behaviors, beyond the scope of the daily happiness period (Kim et al., 2019). Building on these successes, the Delhi government in 2020 began developing a new, holistic curricular framework aimed at ensuring all learners are prepared to thrive.

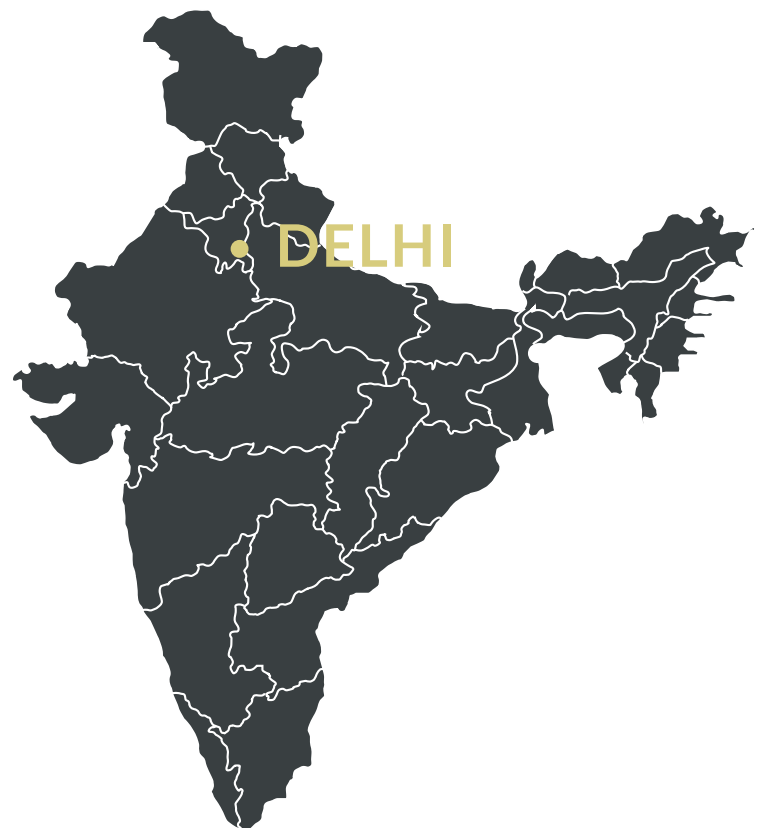
Achieving such ambitious reform at scale is no easy feat. Fortunately, however, Delhi is not the first to attempt sweeping educational change. Rather than reinventing the wheel, the government thought it wise to learn from those who had already traversed reform journeys across the globe. They approached the nonprofit Dream a Dream for guidance, recognizing its decades-long experience implementing empathy-based, whole-child programming in some of India’s hardest-to-reach schools.

The present report emerged from this advisory project, which sought to inform Delhi’s educational strategy. It explores the dynamics of reform implementation in three international contexts to uncover the approaches that helped and hindered educational change.

2.3 Purpose and Structure

This research is about synthesizing insights from policymakers, for policymakers. Given the Delhi government's broad responsibilities, leaders sought to understand the experiences of international peers who could shed light on effecting such high-level change. Specifically, officials expressed interest in understanding the following:

- The broad political and social dynamics of education reform
- Systemic components (political, social, technical, procedural, and managerial) leading to:
 - reform resistance and failure
 - overcoming reform resistance
- Key (political, social, technical, procedural, and managerial) principles for:
 - designing sustainable education reform
 - implementing sustainable education reform
 - sustaining education reform



To achieve these analytical ends, this investigation required data from multiple sources. It was important to study system-wide reforms, given Delhi territory's massive size and relative autonomy. Yet understanding the political dynamics of sub-national cases was also central. Interviewees needed to speak with political authority, having served as key decision-makers in big-picture policy matters. But insights from expert international analysts, such as those at the OECD or World Bank, would also be key, as those were precisely the sources to which government officials turned for guidance.

Taken together, these research exigencies present a number of analytical challenges. First, the report is a retrospective reflection of the implementation experience; it was not possible to systematically collect data to probe the nuances of these changes as they unfolded. Second, the report is written from the perspective of high-level policy makers rather than the complex and diverse implementer realities on the ground. As such, the direct voices of parents, students, and teachers were not included. Nor does the report offer primary evidence on classroom-level behavior change. In this way, the report provides a view of change from the top, rather than from the lived experiences of reform uptake on the ground.

Still, this immersive research does enable robust cross-case analysis of policymaker perceptions. These findings reflect the priorities and perspectives of policy leaders and top education analysts. These power players are important insofar as they ultimately dictate policy priorities and actions. How policymakers understand reform undoubtedly influences the trajectory of systems change. And

how external analysts portray change – whether in multilateral field reports or historiographic articles – drives everything from international funding priorities to citizens' valuing of reform. The fact that these insights cut across contexts, too, provides additional nuance; the ways in which high-level perceptions converge and diverge between cases allows for examination of the social and cognitive mechanisms operating across political arenas.

It goes without saying, then, that this report cannot produce a definitive recipe for sustainable reform. However, it provides an invaluable opportunity to peek behind the reform curtain to explore how decision-makers understand educational change.

3. REFORM JOURNEY DATA

3.1 Data Collection

This project relied on expert informants, as described by Bogner and colleagues (2009), to develop a theory of reform implementation. Interviews with leading policymakers formed the backbone of data collection. These experts were chosen purposively, based on their high-level responsibility for developing and implementing policy changes. Between June and November 2020, the principal investigator leveraged personal and governmental networks to identify and interview policymakers at the deputy minister level or higher.

The geographic focus of this research was also guided by the exigencies of the Delhi Ministry of Education. In collaboration with Dream a Dream, four contexts were identified from which the ministry most hoped to learn: Finland, Portugal, Australia, and the Ottawa-Carleton School District in Canada (referred to as “Ottawa” or “Canada” in this report).

The Delhi government was aware of these countries’ reform contexts and hoped to discover the political stories behind these cases heralded as examples of “successful” and “sustainable” reform.

Based on country choice, six interviewees were selected for one- to two-hour semi-structured interviews. Conversations were conducted via Zoom using an open, thematically structured interview protocol back-built from **the following research questions:**

- What are the key barriers to sustainable education reform?
- What are the crucial enablers of sustainable education reform?
- What role do social and political resistance to change play in hindering sustainable education reform?
- Where (in what groups, organizations, individuals) do reform resistances tend to crop up?
- Who/what tends to be most resistant to reform?
- How have educational leaders successfully overcome barriers to sustainable education reform?

Following each interview, participants were emailed to request public or private documents that could help narrate the reviewed reform journey. Artefacts ranged from a publicly available process report on developing Ottawa student profiles to PowerPoint presentations used by former Finnish ministers to explain their reform designs during international consulting engagements. The purpose of this approach was twofold. First, it allowed for a peek behind the evidentiary curtain to corroborate or challenge policymakers' accounts. Second, it enabled discursive analysis of the types of evidence prioritized by policy leaders – the sources they deemed most useful for unpacking their work for high-level audiences.

These items were supplemented by documents uncovered through systematic online searches. Google, Google Scholar, and Scopus were employed for this purpose, with the same preliminary set of keyword searches conducted for each geography: “[Location Name] AND reform AND (education* OR school*)” and “[Location Name] AND reform AND (education* OR school*) AND resistance.” “Reform” was substituted for synonyms including “curriculum” and “change,” while synonyms such as “failure” replaced “resistance.” Through this process, a suite of reflections, reviews, and analyses

were uncovered. Examples included OECD's “Education Policy Outlook” series, which presented country-specific reviews of national reform efforts, and historiographic journal articles on Finnish education reform published in peer-reviewed journals.

Further targeted searches were conducted to detail each policy context. Queries on schooling statistics, administrative organization, and other operational data were run through national and international databases, including European Union, OECD, and World Bank records. These were used to codify and contrast key figures and structural details on each of the selected countries' education systems.

3.2 Data Analysis

For each country, a high-level advisory memo was produced for the Delhi government's review. Memo sections included: educational context, nature of reform, barriers to reform, actions for overcoming barriers, and takeaway insights on sustainable reform design and implementation. Memo creation began with thematic textual analysis and inductive hand coding of each interview transcript. Coding was iterative, with emergent themes providing the basis for two subsequent rounds of coding. While interview data served as the starting point for memo insight generation, integrative review of discovered documents complemented this inductive analysis. Secondary source artefacts were thematically analyzed, with a focus on highlighting and synthesizing the ways in which they corroborated or contradicted primary data.

Ultimately, the Australian reform case was omitted from this project. Insufficient data primarily drove this decision. Insights from two detailed interviews and dozens of reform documents failed to produce one coherent, analyzable reform journey; multiple, disparate reform cases emerged, with policymaker data unable to overlap and weave a coherent reform narrative.

This report builds on the analyses used to construct each reform memo. Once again, a thematic textual analysis was conducted, with three rounds of inductive coding. But this time, the object of analysis was primarily the reform memos. The qualitative analysis software Atlas.ti was utilized to aid coding, beginning with a first round of in vivo, exploratory analysis. Following repeated inductive coding, Atlas.ti was used to compile a frequency table of thematic codes. The differential occurrence of code families – such as communication, values, and

training – was tabulated in each of the three major memo sections: barriers, overcoming barriers, and policymaking insights.

To validate coding in Atlas.ti, an analytical table was developed to compare and contrast themes across the three memos. Language from parallel memo sections were hand coded side-by-side using an inductive approach. Emergent themes were noted and synthesized in a running table.

4. ANALYZING THE REFORM JOURNEYS

4.1 An Overview of the Cases

While Finland, Portugal, and Ottawa presented unique policy proposals, a unifying logic drove them all: whole-child learning for the future of work and life. Reforms were selected in consultation with the interviewed policymakers, who determined the suite of changes from which they most learned about resistance and change.

The Finnish Case:



Finnish leaders selected the national curricular reform of the late 1990s, as well the national curricular framework established in 2016. They additionally drew upon working knowledge of historical reform endeavors from the 1970s, on which contemporary changes were built.

In the Finnish context, it was particularly challenging to parse discrete reforms. Leaders noted a history of sustained policy change based on a set of shared educational values. Reforms emerged in the wake of World War II, when Finland was a rural agricultural state reeling from global economic turmoil. Despite a codified vision of “humanistic, child-centered” primary education, a two-tracked educational model emerged that sorted most learners into abridged, work-oriented studies. In light of a struggling economy, basic education for all came to be seen as a national economic imperative. And so, preliminary reforms focused on human capital development while explicitly prioritizing learning equality across class and geography. Pre- and in-service teacher training reforms complemented this comprehensive schooling push; by 1979, all educators were required to hold a master’s degree.

Following the comprehensive schooling reforms of the 1960s and 70s, Finnish educational change has tended to emphasize: loose standards with localized decision-making; broad subject learning with a focus on creativity; and devolved accountability relying on teacher insight and professionalism. Most recently, Finland has renewed focus on structural reforms, including a push for mandatory secondary education with modular vocational and academic learning pathways.

Finnish reforms of the 1990s and 2010s focused on curricular development and decentralization. Both eras relied on a community goal-setting approach, mapping the skills and competencies learners needed to graduate using global evidence, national convenings, and local consultations. The 1994 national curriculum solidified a culture of local ownership, providing a broad core from which teachers, schools, and municipalities could build and codify their own curricula and practices. Finland’s 2016 national curricular framework formally mandated phenomenon-based learning practices – contextualized study of real-world concepts without disciplinary boundaries – alongside subject-based instruction. However, teachers still enjoy significant autonomy in planning and developing cross-curricular themes.

Today, the national core’s guidance remains relatively broad, prescribing, for example, that schools must support children in understanding the relationship between diverse topical contents, or applying knowledge in collaborative learning contexts. Broadly, it seeks to ensure students develop broad competencies across multiple subject areas – and, most importantly, learn how to learn.

The Portuguese Case:



Under analysis in Portugal were a set of ongoing curricular reforms focused on flexibility and school autonomy; these began in 2015 with the development of its National Skills Strategy.

Compared to Finland, the Portuguese case was slightly more straightforward to conceptualize as discrete moments of change; analysis was bound to the 2015 to 2020 reforms. Curricular flexibility and school autonomy were at the heart of these changes, though a systematic push for citizenship and inclusion also featured heavily. Four major outputs emerged during this period: a model student skills profile, a flexible core curriculum, a law on inclusive education, and a strategy for citizenship education.

Curricular change began with the development of its National Skill Strategy, which involved a systematic assessment of its curriculum in relation to both international referents and national skill demands. A ministry-convened group then designed – through open consultation – the 2017 Students’ Profile, which articulated what learners should know upon leaving compulsory schooling. Using this strategy and profile, the ministry pruned and consolidated the bloated national curriculum. The resulting 2017 Essential Core freed up space for inclusion, interdisciplinary learning, and novel pedagogies, such as project-based learning. It also integrated citizenship education – covering areas ranging from gender equality to consumer education – which is taught by the main classroom teachers in primary schools, and as mandatory specialist subjects at the secondary level. Under these changes, schools gained significant autonomy for curricular decision-making. They were also grouped into small clusters, facilitated by regional staff, for peer learning. Further details on the reform process are located in Annex 2.

The Ottawa Case



The Ottawa case focused on the period from 2012 to 2018, during which leaders developed a comprehensive “Exit Plan” for student success. In Canada, curricula and major policies are set forth at the provincial level. For Ottawa, this comes from the Ontario government. But localities serve as the ultimate administrators of Canadian education, with the flexibility to reinterpret and inform provincial guidelines. The 2012 to 2018 Ottawa reform case emerged as an endeavor to refocus broad curricular guidance into a district-wide strategic plan, which schools could then use to reimagine their pedagogical practices.

It began in 2012 by mapping the ideal outcomes for students leaving compulsory schooling. The ministry convened a 25-member community steering group, which included parents, teachers, school leaders, postsecondary representatives, and industry officials. The group’s central mandate was to determine the skills and characteristics with which all learners should leave the system – a so-called “Exit Plan.”

The process started with literature reviews on global and local graduate outcomes. It then expanded into a survey-based consultation process involving over 1,000 stakeholders from across the district – from families to employers. The result were five characteristics (such as collaborative and globally aware) and five skills (including ethical decision making and digital fluency), framed as the things “our students will be” in order to have success along different life pathways – from citizenship to higher education. Schools used these goals for open innovation cycles, developing improvement plans to show how they would approach and assess classroom change. The results of such experimentation were regularly fed back to the district office, which codified and shared learning across its network. This policy plan has thus far survived through three election cycles and four strategic plan refreshes. The Exit Plan language is still used daily in schools and boardrooms throughout Ottawa.

4.2 A Snapshot of “Resisters”

Across all contexts, barriers to change were invariably framed as resistance by discrete clusters of actors. The common language of “resister” emerged from interviews and documents; it is used here not to shame or disparage, but rather to reflect change dynamics from the high-level ministerial gaze. Four major loci of resistance emerged from this analysis. Starting with the most frequently cited resisters, these were: teachers, administrators, parents, and politicians. The roots of these resisters’ (in)action are discussed in greater detail in Section 4.3.

Discussion of teacher and administrator resistance followed a similar pattern across all contexts. Resistance began during the design phase as part of the stakeholder consultation process, which often included school forums or public calls for comment on policy ideas. Vocal resistance to both the substance and strategy of reforms often emerged not through individual actors, but rather through organizing bodies or institutions such as teacher unions or school districts. A common example of this was teacher unions seeking meetings with policymakers to outline the impracticality of curricular change within the bounds of teachers’ contractual expectations; this might include capacity to implement changes within standard work hours, for example, or how curricular change could impact achievement on standardized assessments.

When it came time to implement reforms, teachers most often resisted by way of noncompliance and inaction, as seen through the harsh lens of hard accountability. In Portugal, for example, reformers received word that teachers simply did not change their practices. For both groups, issues of practicality, capacity, and perceived value dominated the conversation.

Policymakers and analysts often pointed the finger at parents, as well. Parent resistance most often occurred at the implementation phase, at which time they failed to see the fundamental purpose of the reform. Such resistance sometimes manifested through social and public media channels, in the form of blogs, editorials, or news commentary. But it was most often funneled directly through schools, as dissent and demands directed at educators. In this way, teacher and administrator resistance could, at times, be seen as a knock-on effect, rooted in vocal parent dissatisfaction to which educators could not help but respond. Teachers and administrators would then vent their frustrations upwards, toward local, regional, or national leadership, or simply halt reform practices to placate aggrieved parents.

Politicians and policymakers, themselves, infrequently emerged as reform resisters. When they did, it was often in the context of stalling reform development and deliberation. The minority party, for example, might refuse to participate in discussions convened by the majority's cabinet, or even launch discrete campaigns to rally their constituents against proposed changes. Bald partisanship sometimes emerged as the prevailing resistance logic, but ideological considerations often reigned: resistant politicians tended not to see the need for proposed reforms in the local or global context, or believed them to be misaligned with their visions of the country's future.

Curiously, students did not appear in any document or discussion as reform resisters. While heartening that young people were not identified as barriers to systems change, this omission may alternatively be seen as highlighting the extent to which adults dismiss student agency in the educational change process. Disregarding learner agency would be both philosophically and technically problematic; after all, change ultimately happens in the classroom, and a student will simply not learn if she is unable or unwilling to do so.

4.3 Barriers to Sustainable Reform

The roots of such resistance to change in education were multifaceted and complex. Analysis revealed five interrelated themes, which seem to be present in all the contexts considered. These factors, listed in decreasing order of occurrence, were values misalignment, dominant logic, practicality, capacity, and time.



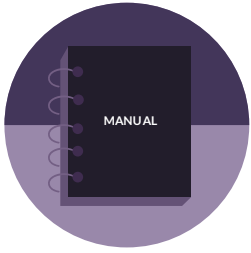
Values – conceptions of what is right, good, and desirable – were, without a doubt, at the heart of reported reform resistance. In practice, this was a matter of misalignment between a reform’s perceived value and the educational goals and priorities held by each educational actor. In Ottawa, for example, virtually all groups at some point questioned the import of noncognitive skills development; they further questioned whether this was even within the remit of schools. Parents, seeing skills such as “ethical decision-making” in the new student success profiles, decried the reforms as neglecting the real purpose of education: “traditional” academic domains, such as numeracy and literacy.

In Portugal, this values misalignment was evident during a convening of teachers by subject consortium. Each topical group believed their discrete subject should be an academic priority; they flatly rejected curricular change that explicitly reoriented class hours away from their domains and toward “interdisciplinary” learning. At the same time, some Portuguese policymakers were leery of words like “competence,” which they viewed as signaling curricular softening – a move to jettison the all-important classics learners needed to be globally competitive.



Dominant logic proved another powerful force for resistance to educational change. Highly related to values, dominant logic refers to deeply held beliefs about how things work best. This was principally articulated in motivational terms: what was the need for educational change? The so-called “traditionalist inertia” of Portuguese education provided a prime case in this regard; rounds of inconsistent, unrealized reform proposals fed a professional self-narrative that the current model was the one that worked best – because it was the one that had endured.

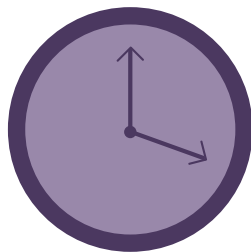
The Finnish case of dominant logic is particularly intriguing, as well. The nation’s highly educated teacher workforce and meteoric rise on international assessments left parents, educators, administrators, and policymakers believing there was no room for systems improvement. As one policymaker, assessing this challenge of empowered professional identities, put it: “why change when you’re the best in the world?”



Practical considerations abounded, as well. Though marginally less prevalent than values-based resistance, it reflects the fact that one question must ultimately emerge when implementing education reform: how will this work in practice? Ottawa teachers and administrators, for example, simply had no idea how it looked and felt to teach for the nebulous notion of “wellbeing.” As a result, they rejected reforms wholesale on the grounds that they were not workable in classrooms. Further, parents and educators were quick to point out issues of systems misalignment. In Portugal, some who backed curricular reform in concept rejected it in practice, believing it would be ineffective for university admissions tests, which they understood to rely on memorization above “newly-valued” critical thinking abilities.



Capacity concerns also emerged, as individuals confronted the time and expertise required to implement reforms. In Portugal, this was largely a matter of teacher burden; overworked educators sensed that innovative, whole-child pedagogies demanded unavailable time and expertise. Flexibly developing school-specific lesson plans appeared significantly harder than reading from a textbook. Canadian administrators found they lacked the knowledge and resources needed to train and support individual teachers; even when teacher trainers managed to foment change through one-on-one support, they desisted upon realizing that this fragmented approach had bred massive variations in teacher practice.



Time proved another recurring obstacle. Educational change takes years to sustainably plan, implement, and assess, yet reform timelines often span just one electoral term. In Portugal, memories of fleeting reform led educational actors to dismiss what they assessed would be short-lived change; some educators, for example, simply kept using their existing lesson plans, biding time until – they believed – faddish reform energy would fade. Finnish stakeholders acutely felt this disconnect, too, mistrusting what they perceived to be politicians’ rushed process to identify problems and develop quick fixes to curry favor with constituents.

Even when divorced from political instability, however, time presented the challenge of evidentiary feedback loops. It is human nature to disengage when one’s efforts do not yield obvious results – and, of course, educational outcomes require decades to evaluate. For this reason, a former Finnish minister noted that “putting long-term reforms high on the agenda is against the dynamics of democratic politics; you need these long, coalitional approaches, but it’s hard to quickly test what ‘works.’” Canadian policymakers saw missing evidence as halting teacher uptake of wellbeing reforms. They pointed to a school piloting holistic learning strategies, which failed to translate to gains on the first round of regional assessments; disappointed by this apparent stagnation, educators simply returned to traditional approaches.

Of course, some **areas of divergence** also surfaced between these cases. Finnish reformers did not mention **assessment incoherence** as driving resistance, while both Canadian and Portuguese officials highlighted concerns over standardized assessments – particularly those required for university admissions – as propelling parents’ and educators’ refusal to change pedagogies. This might be a result of the long-term nature of Finnish reform, which started before and largely resisted the standardized assessment boom characteristic of the Global Education Reform Movement that began in the 1980s (Sahlberg, 2011).

Portugal, on the other hand, had a unique focus on educators' **fears of autonomy**. Reformers pointed to persistent worries about school inspections and a fear that they would face consequences from misappropriated flexibility – as if there were a “correct” pedagogical vision of curricular decentralization that policymakers were withholding. This was perhaps rooted in the distinctive Portuguese combination of bureaucratic centralization and strong uptake of the neoliberal reform agenda, through which individual schools were analyzed as the core determinants learning equality and student success (Gomes, 1996). In this context, the specter of school inspections loomed large as a punitive tool used to assess the degree to which schools adhered to centralized teaching mandates.

Finally, Canadian policymakers specifically stressed the challenge of **role accountabilities**: the need for parents, teachers, and leaders to know how they, specifically, should change, and how that change would be assessed. When such accountabilities were not transparent or otherwise broke down, resistance cropped up as a game of buck-passing, with educational actors maintaining the status quo while blaming others for faulty implementation and adherence. This lack of clarity may have been a function of the regional nature of this reform case; expectations are far less clear when they differ between the local, regional, and national levels.

4.4 Enablers of Sustainable Reform

The primary purpose of this reform research was to glean insights into how leaders overcame entrenched resistance to educational change. To this end, analysis involved an exploration of both the countermeasures that might help leaders directly unstick resistance, as well as tenets for building a reform plan that inhibits such resistance in first instance. Five common themes in overcoming and impeding resistance emerged across all cases. In descending order of frequency, these were values, practicality, communication, agency, and leader capacity. It is helpful to examine these themes in conversation with the resistance explored above, as practical insights tended to mirror one-to-one the barriers policymakers identified.



Defining and aligning collective values: Unsurprisingly, values also topped the chart of mechanisms driving sustained educational change. Consistently, leaders and artefacts highlighted the importance of defining a shared purpose for reform efforts – having a coherent “why.” This always began with a discussion of societal and educational challenges to develop a collective problem statement. And it regularly relied on cross-sector insights and global data on best practices and skill demands to solidify reform urgency and rationale.

Portuguese leaders, for example, convened interest groups from across the political and social landscape – including nonprofits, businesses, and unions – to identify the six most pressing developmental challenges facing modern society; based on these challenges, which included the technological revolution and the need for adaptability, the panel synthesized corresponding educational frameworks from international bodies such as OECD and the European Union, which spoke specifically to these demands. All communication – from meetings to memos – began by underscoring this agreed-upon global need for transversal skills, the development of which the overloaded curriculum precluded.

Finland similarly looked for issues under “change pressure” – those where stakeholders assessed global evidence similarly and could unite around a shared direction. It was a matter of charting a path of least resistance. For example, leaders brought international studies on educational best practices and the future of work to 1,000-stakeholder panels, from which they mapped common reform impressions; transversal skills emerged as the most commonly identified priority across panels. Meanwhile, Canada used industry data on skill demands to highlight that reform efforts prepared learners in response to a pervasive competency gap in socio-emotional domains.

When values-based resistance emerged, it was the role of leaders to remind stakeholders of the reform's value proposition. When Canadian educators said that holistic pedagogical practices would complicate classroom management, leaders showed evidence that this teaching actually developed students such that classrooms would be even easier to manage. Similarly, when Finnish teachers resisted the wellbeing curriculum reforms, leaders convened discussions based on the problem statement they had jointly developed with educators: student unhappiness made them harder to teach, and halted learning progress.

Global evidence often helped leaders appeal to stakeholder values, particularly when dominant logic proved a barrier. Many Finnish parents and teachers flatly rejected making upper-secondary schooling mandatory in Finland, noting that they had topped international academic charts without these students who did not wish to study. In response, policymakers spent months collecting data and convening discussions on global research that showed the economic and pedagogical benefits of secondary education, and how these would drive Finland toward stakeholders' societal goals.



Demonstrating practicality: As above, actions related to reform practicality were central to driving change. These most often took three forms: building reform evidence, demonstrating technical practice, and showing alignment with existing behaviors. Building and publicizing reform evidence was the most commonly discussed enabler. This was baked into the Portuguese reform process from the fore, with a system of innovation pilot cycles. The ministry invited schools to devise and track individual plans to combat grade repetition, including their own success metrics. Over 3,000 unique models were developed and piloted. Learnings on what did – and did not – work were publicly shared as a portfolio of evidence for schools across the nation.

The Finnish case similarly involved a trialing approach, focused on building evidence with the smallest, easiest-to-change populations first. This took the form of a staggered rollout beginning in the rural, less-populous north – in small schools that required less stakeholder-wrangling and fewer resources. Leaders used evidence from – and local champions of – northern reforms to legitimize rollout in the populous, vocal south.

Canada exhibited the other key dimensions of practicality through its focus on school-level, collaborative demonstrations of proposed reform practices. Centrally, leaders sought to emphasize that educators were not starting from scratch, but rather leaning into existing pedagogies. As the former district leader put it: “You’re not walking away from that; you’re walking farther into it.” They created a four-page handout describing proposed changes and showing where they appeared in existing policy documents and practices. For example, the “work habits” domain was already supposed to exist in student report cards. They then worked with teachers to collaboratively define, demonstrate, and disseminate for school leaders and teacher trainers how these changes might look in the classroom.



Facilitating dialogic communication: Communication was the third-most discussed reform driver, with particular focus on enabling dialog and debate. In Finland, dialog, debate, and – centrally – disagreement were integrated into the design process. It began with an obligatory parliamentary committee procedure, which required the governing coalition to develop a platform, get expert feedback, debate with opposition parties, and undertake stakeholder consultation before the reform could be passed. The idea was that, if all groups discussed and disagreed before school-level implementation, opponents would have exhausted their

arguments and bought into a convincing compromise. Interestingly, however, Finnish leaders noted the value of developing clear, evidenced solutions before soliciting broader feedback; they acknowledged that, if stakeholders were involved too early with insufficient data, their perceptions would be tainted, and they would be unable to make a balanced assessment of the reform's value.

In Portugal, leaders encouraged parents to organize local seminars on education reform, with full autonomy to choose the topics and attendees. Government representatives were sent to explain and debate reform rationales and articulate how they would incorporate seminar learnings back into the reform plans. Canadian officials recounted the importance of developing a common reform language to support clear, ongoing dialog. They worked with stakeholder panels to research and define words such as “wellbeing” and “character” in preliminary policy papers, then used them consistently in meetings and documents to ensure its uptake in all spaces from the home to the classroom. By ensuring coherence, they guaranteed stakeholders were not talking past each other in debates.

Dialogic strategies were often highlighted as a tool to overcome resistance. Nowhere was this more apparent than in Portugal, where the state secretary of education personally responded to every invitation to speak with and visit schools and communities, driving over 100,000 kilometers annually for local observations, forums, and debates. As the secretary noted: “proximity is key.” Showing up, listening, and engaging allowed leaders to develop an empathetic understanding of local challenges to practice – as well as to identify entrenched beliefs. They could then use that knowledge to open the door for productive discussions to overcome resistance.



Fomenting local agency: Reform leaders also discussed impressions of agency as a key reform enabler. Principally, this was a matter of identity; those implementing reforms needed to see themselves as being experts in their respective domains. Portuguese policymakers stressed the importance of articulating trust in local leadership in all communications – from meetings to policy documents. They consistently told schools and educators that central bureaucrats believed in them and counted on their knowledge. Policymakers conceived of and trained teachers to be “change leaders” – subject experts with the confidence and capacity to model change for those around them.

Finnish reformers referred to this as breeding a “developer identity.” They systematically put teachers in charge of creating or adapting programs, policies, and practices. Canadian reforms followed a similar pattern, articulating a vision of open innovation. Reformers shared a vision whereby individuals could experiment with new teaching approaches. Successful experiments were codified and adopted across the system in regular cycles.

The same pattern of visibly prioritizing ground-level expertise was regularly expanded to include parents and other community members, as discussed in previous sections. See, for example, the case of Portuguese parent involvement – inviting families to set the reform agenda, themselves, by hosting local seminars on the topics most important to them.

In all cases, the logic was the same: critical involvement bred buy-in by positioning reformers and implementers on the same side of the table. Local agency was not only a method for precluding resistance, ensuring all actors had skin in the game, but also a tool for overcoming emergent blockages; it fostered a cohort of local champions who could work with resisters as trusted peers.



Building leader capacity: Finally, policymakers regularly highlighted leader capacity as central to sustainable change. Reformers focused first and foremost on the capacity of school and teacher leaders, to whom they regularly referred as “risk-takers” and “culture-setters.” This was, in part, a functional decision, following the time-tested cascading, train-the-trainer model of capacity development – amplifying reach by focusing on those who could replicate and pass on knowledge. But it was also an ideological matter: leaders were at the vanguard of change, nurturing mindset shift by example. In Canada, policymakers developed a peer learning community where school leaders could come together to network, troubleshoot, and share best practices. They convened monthly meetings of over 200 operational and curricular leads, focused on developing the knowledge and skills needed to explain, model, and support new practices. “School culture,” the former regional director observed, “does not happen without leaders at the front of it.”

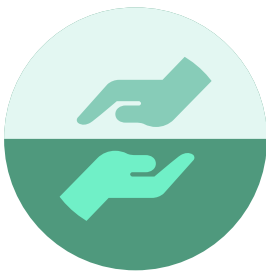
Portuguese reformers also underscored the need to first invest in training for local leaders. The reform consultation process began with outreach to school leaders, providing them resources, trainings, and discussion channels so they might be prepared to answer the tough “why” and “how” questions from parents and teachers. A system of school clustering, with regional staff support, then enabled leaders the opportunity to learn from and with their peers.

With its gradual rollout model, Finland also prioritized leadership development; it bet that the low lift required to empower small-school leaders would yield dividends as those trailblazers could serve simultaneously as proof-of-concept and guide to progressively more unwieldy institutions. Of course, the Finnish reforms were predicated on a highly trained teacher workforce. Policymakers pointed to a culture of continued professional incite change; educators were more ready to take on new approaches given they had extensive preparation studying and evaluating pedagogy through and beyond the postgraduate level.

Capacity development consistently arose as a way to overcome resistance, with particular focus on the cognitive and affective blockers of change. Policymakers pointed to the frequency with which parent, teacher, and administrator resistance was simply a function of faulty self-efficacy beliefs – too often, these actors did not change their practices because they did not believe they could. The remedy was to train leaders with the social and technical capacity to skillfully guide their networks through the proposed changes, making them appear as accessible and unthreatening as possible.

Reform accelerators were however, **not uniform across cases**. The Portuguese reforms relied particularly on ensuring stakeholders saw that the education system would reward new models of teaching and learning. Reformers developed and publicized a university admissions assessment aligned to the new reforms. In Finland, it was important to ensure the authority and decision-making power of civil servants – the bureaucrats leading reforms across the nation. This “strong human nucleus” was necessary for implementational success. Meanwhile, Canadian reforms depended upon a notion of iterative, bounded prescriptivism to overcome fragmentation and incoherence. Change began by leaning on prescriptive rules and procedures, gradually making room for experimentation over time; when reformers noted inconsistency across networks, they reintegrated a more structured vision of reform.

Taken together, the above analyses point to **three enabling actions** for sustainable education reform:



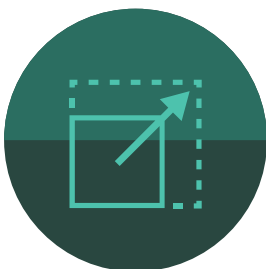
1. All actors in a system must define and align collective values.

These values reflect a coherent problem statement and rationale for education reform. This can be accomplished only through **participatory** policy design methods, such as **dialogic communication** across all levels of the education community.



2. Governments must demonstrate reform practicality.

This involves building **evidence** to show that the reforms work, modeling **practice** to show how the reforms work, and exhibiting **alignment** between new and existing practices – to prove the reforms are neither a total departure from current learning nor an excessively heavy lift.



3. Ministries must cultivate local agency.

Specifically, this requires a focus on building local **leadership** capacity, with the idea that leaders are front-line culture-setters whose beliefs and behaviors guide collective action. It also entails empowering **educators** – valuing them as the experts best suited to develop and adapt interventions for their own classrooms.

5 CONCLUSIONS AND NEXT STEPS

In some ways, this reform research constituted an effort to do the impossible: distill the “secret sauce” of sustainable educational change.

Even if this secret sauce were discoverable, this report alone most certainly did not crack the recipe. Instead, it should be approached as a sort of preliminary checklist for ministerial reflection: have reformers considered these key elements – including values, practicality, and agency – when crafting policy programs? Additionally, it presents a number of areas in which to expect, and preemptively address, change resistance. And, in showing the similarities and differences across reform contexts, it opens the door to continued international dialog and collaboration on educational change.

Further research is needed to deepen and expand these reform insights. Principally, reformers would benefit from a richer dataset that is longitudinal, multi-level, and – most importantly – participatory. Following reform cases from start to finish would enable exploration of the processes undergirding reform: mindset shift and behavior change. Cross-level data, meanwhile, would allow for nuanced understanding of change expression at the heart of it all: classrooms, homes, and other sites of learning. Finally, this research needs to be more than observational; it must be

participatory, incorporating the visions and voices of students, parents, and educators, who ultimately stand to gain or lose the most from reform.

In addition to diving into new datasets, it would be useful to reflexively explore a related research question: why did these themes emerge? This involves studying both underlying causal mechanisms, identified through methodologies such as process tracing, as well as the beliefs, values, and logics that drove these themes to the top of reformers’ minds. The themes surfaced in this report point to the fundamentally socio-cognitive nature of educational change. That is, reform expression involves the complex interaction of individual and communal values, visions, and perceptions. Additional studies must explicitly home in on these social and cognitive dimensions of change.

This work ultimately speaks to the exigencies of reformers across the globe, who seek that elusive “secret sauce” for implementing educational change. It prompts a level of policymaking reflexivity, bringing us one step closer to ensuring all children are prepared to thrive in a fast-changing world.

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7 ANNEX

7.1 Annex I: Interview Protocol

Name:

Position:

Date:

Interviewee Background:

- **Please give a brief background on your engagement with the education reform process.**

- o Where, when, and how were you involved?

Reform Journey Intro:

- We're specifically interested in understanding the political journey toward sustainable reform. Can you tell me a bit more about the political process of this reform effort?

- o **Goals and alignment**

- What was the reform theory of change/purpose?

- o Technical planning

- o Implementation and evaluation

- We're also curious about the social dynamics of reform. Can you elaborate on the different actors involved in the reform journey?

- o How did political leaders engage them?

- o How did they relate to and work with one another?

Reform Journey Barriers:

- **What were the greatest barriers to achieving/implementing political reform?**

- o To sustaining reform?

- What role did social and political resistance play in hindering reform?

- o Where -- from whom -- did such resistance tend to occur?

- o What are the 2-3 biggest causes of this resistance?

Reform Journey Enablers:

- **Did you successfully overcome this resistance? How? / What steps did you take to successfully overcome this resistance?**

- o Processes
- o Partnerships
- o Actions

- Overall, what were the 2-3 greatest enablers of sustainable education reform?

- o Political
- o Social
- o Technical

Final Thoughts:

- What other reform journeys should we consider exploring? Why?
- Is there anything else you wish to share?

Closing Script:

- What other reform journeys should we consider exploring? Why?
- Is there anything else you wish to share?

7.2 Annex II: Additional Reform Histories



Portugal

In 2015, Portugal developed its National Skill Strategy. It began with a strategic assessment of the curriculum, which, until that time, had yet to be systematically reviewed. International referents played a significant role in this analysis, as Portugal eagerly participated in the OECD Future of Education and Skills 2030 project, which sought to establish common goals and language for teaching and learning.

Ultimately, the ministry advanced a vision of educational change along four dimensions: identifying target skills and competencies for students, developing a citizenship education strategy, elaborating a law on inclusive education, and creating a flexible core curriculum.

Parent and student voice played a large role in the curricular reforms. The ministry held a number of seminar series allowing parent representatives to learn about and debate the nascent curricular proposals. It also organized assemblies of students, who elected representatives to participate in the consultation process and ultimately published a book on their schooling priorities. To legitimize this work, the government introduced a curricular law mandating regular instances for hearing student voice on the curriculum.

Schools were targeted for seminars, trainings, and public discussions on the proposed reforms; the ministry particularly emphasized engaging school leaders and inclusion coordinators. Over a one-year discussion period, the state secretaries for education and inclusion visited schools across the nation to convene public hearings. In parallel, all interested parties were invited to submit formal comments during a 90-day consultation period.

This built on a 2016 program for promoting school success, which focused on school-level solutions to a pervasive national problem of dropouts and repetition. The ministry intensively trained principals to identify the weaknesses contributing to these problems, and develop a responsive 3-page action plan for the next school year. Principals were allowed to utilize any measure and dream up any solution, as long as they committed to reducing repetition rates. The project ultimately produced nearly 3,000 different approaches, with the 50 most effective one published in a national portfolio of best practices. This effort was a first step in scaffolding school autonomy while socializing a belief in local ownership and voice.

To solicit educators' input on curricular demands, the ministry organized a large conference with teacher societies from each subject. Each society was asked the same questions, which they shared through presentations. These included their perceptions of the skills demands for 21st Century students, how their subject contributes to these skills, and the interrelations between their subjects and others.

To this end of creating an educational base, the ministry convened a group to design a model Students' Profile. Launched in 2017, it articulates what learners should know upon leaving compulsory schooling. The profile documents went through open consultation for 60 days, with schools encouraged to submit comments. The final, integrated student profile contains two parts: the principles and visions undergirding education, and the values and competency areas education should develop. It sets forth broad student outcomes in competency areas such as body awareness, interpersonal relations, aesthetic sensitivity, and critical and creative thinking, as well as student values including freedom, citizenship and participation, and curiosity.

The process was ultimately framed as a chance to downsize the curriculum to a common base—the 2017 Essential Core curriculum—freeing up space for inclusion, interdisciplinarity, and novel pedagogies such as project-based learning. Citizenship education, covering areas such as gender equality, interculturalism, and consumer education, is integrated into the curriculum and taught by the main classroom teacher in primary education; at the secondary level, a specialist teacher leads an ongoing course called Citizenship and Development.

The 2017-18 school year served as a pilot period to test and define the final version of the proposed education laws. Trailing occurred in school clusters—groups of municipal schools serving as kindergarten-through-high school pipelines. The ministry publicized an open call for participation, expecting perhaps 50 of the 800 clusters to join; in reality, there was such enthusiasm to participate that the ministry had to cap participation at 250 clusters.

To monitor the pilots, the ministry created a system of regional teams that directly liaised with local school clusters. Insights from localities, through presentations from individual school teams, fed into national events for further discussion. Simultaneously, media outlets were invited to visit schools and share their observations. These reforms are now in the final phase of implementation and monitoring, though COVID-19 has halted some of the planned rollout.

