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NPM Discourse, Testing, and the Selection of Head Teachers

Education Policy Innovation as a Collective Performance

by Emiliano Grimaldi *and* Giovanna Barzanò

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1. Introduction

This article focuses on the recruitment of Italian head teachers in Italy and on the process of institutional innovation that has recently interested the design and enactment of the procedures of candidate selection. The making of the new system of head teacher selection launched in 2011 is interpreted as a process of collective performance [Callon 2007] aiming at building new institutions. Such a process is triggered by the vernacularisation [Appadurai 1996] of the recipes sponsored by the global managerialist policy discourse in the field of education in Italy. This work is part of a research project aimed at describing and understanding the new ways to appoint and evaluate educational staff [Barzanò and Grimaldi 2012; Barzanò and Grimaldi 2013], looking at innovation as an emergent interactive activity which involves many actors, sometimes cooperating and sometimes opposing one another

This article is the outcome of the collaboration of the authors. However, in order to ascribe responsibility, we declare that the Introduction and the Conclusion are co-authored, Giovanna Barzanò wrote “The context(s) of headteacher recruitment” and “The unfolding of markets” while Emiliano Grimaldi is the author of “Education policy enactment as a collective performance”, “Making merit visible according in the NPM formula” and “The inventory of agencies and the diversity of agencement. New assemblages and associations”.

[Callon 2007]. Our analysis makes use of a combination of sensibilities derived both from governmentality studies [Foucault 1991a] and tools from the ANT-inspired research framework developed by Michel Callon on performativity [Callon 2007; Çalışkan and Callon 2009, Çalışkan and Callon 2010].

In particular we tackle the events that occurred in the most recent national open competition (2011-2012) to select Italian head teachers, which attracted 42,128 applicants, competing for 2368 positions. This mass of applicants did not come as a surprise to the ministerial offices in charge of managing the process. According to present legislation, the competition should be launched at least every three years; however political and bureaucratic constraints have caused severe delays. In 2011, six years had passed since the former call had been published, leading to a dramatic accumulation of aspirants. How to deal with such a crowd of teachers trying to benefit from one of the only opportunities to improve their otherwise very flat career?

The “magic” tool was found in the introduction of a new pre-screening strategy, a sort of “sudden death test” which, according to a NPM-inspired formula, was expected to identify the smaller group of applicants who should have been awarded the entitlement to participate in the more substantial test, leading to a reduction of 70% of the initial group. We intend to focus on the actualization [Callon 2007, 325] of this new “formula” and its socio-technical agencements (STA hereafter) that make more calculable the core of a process formerly based on professional appraisal and peer judgement. We will identify the inventory of actors it has engaged in the process, and show how it has dismantled former institutional practices, originating new scenarios through a variety of STAs. We believe that the sensibilities of governmentality studies combined with the most recent Callonian perspectives can allow us to grasp unexplored aspects and implications of the development of new recruitment practices, drawing the attention to elements which can be crucial both for researchers from different backgrounds and for educational decision makers and practitioners.

The article starts with a short description of the interpretative toolbox [Ball 2006] we adopted and of the rationale underpinning its use in our analysis. The work then situates the issue of head teacher recruitment in the general context of education systems. It also makes reference to the international scenario and to how the longstanding Italian tradition – as well as current events in this field – relate to it. In the central part of the paper, a set of key traits of the new recruitment process are described and interpreted as performances of the STAs through which the new formula on candidate selection is actualized. This includes the inventory of actors who become engaged and the assemblages and associations originated, the map of intended and unintended head teacher competencies unfolding in the process, the

markets which are reinforced and develop around the adventure and the process of formation of the new qualified candidate to headship.

The article tells part of the story of arrangements and co-evolutions involving policy discourses, materialities, bodies and agencies, whose associations have originated new processes of objectivation and subjectivation [Foucault 1982; Foucault 1991a], as well as opened up new spaces and possibilities for acting and thinking [Ball 2006] about headship, its design and recruitment. A set of paradoxical effects are highlighted in the conclusion: *a*) the making of the test as a contestable and vulnerable *obligatory passage point* (hereafter OPP) [Callon 1986]; *b*) the commodification of knowledge about testing and the reinforcing and opening up of intertwining markets; *c*) the disentangling [Callon 2007] and fragmenting of professional identities. Finally, the usefulness of the analysis proposed is discussed, highlighting how it can offer a contribution to the debate under way, both from a theoretical and practical perspective.

2. Education Policy Enactment as a Collective Performance

As stated in the introduction, in this article we examine a process of policy innovation in the field of education, focusing on the conditions under which a new mechanism for selecting head teachers through testing and standardised technologies comes into being as a new “regime of practices” [Foucault, 1991b, 79] in a particular time and space. As such, our analysis draws from the tradition of the *studies in governmentality* [Burchell *et al.* 1991] with a theoretical sensibility towards the “how of policy” [Dean 2010]. In so far, it seeks to: *a*) identify *in vivo* the emergence of the new regime of practices under scrutiny; *b*) map the entities that constitute it, and above all, *c*) “follow the diverse processes and relations by which [these entities] are assembled into relatively stable forms of organization and institutional practice” [Dean 2010, 31].

Given this general aim, our work owes much to Callon and colleagues’ reflections on the concepts of *performativity* and *socio-technical agencement* [Callon 1998; Callon *et al.* 2007, Çalışkan and Callon 2009]. We are aware that such an “assemblage” of interpretative sensibilities and tools could sound adventurous and bizarre to someone. At a first glance, a critical approach such as governmentality, with its emphasis on *dispositif*, self-formation and moral authority [Dean, 1994], could be regarded as incompatible with the Callonian approach and its refusal to explore intentionality and the domain of the subject [see also Dumez and Jeunemaître 2010 on the differences in the conceptualization of *dispositive*]. However, in a process of hy-

bridisation between complementary perspectives, we believe that Callonian emphasis on the “powers of associations” and the performativity of the *discursive* can prove to be generative and help new questions and foci of analysis to emerge. We hope to make this evident in the development of our argument.

In fact, we read our policy trajectory as a *collective performance* [Callon 2007, 340], that is a process of “adjustment of [a set of specific] statements” about the most effective and meritocratic way to select head teachers and “their associated worlds” [Callon 2007, 335], triggered by the vernacularisation of the policy recipes [Appadurai 1996] sponsored by the global managerialist discourse in the Italian education system.

The Callonian notion of performativity has offered us the possibility to relationally understand the unfolding of this new regime of head teacher selection, interpreting such an unfolding as the performative effect of the interplay between the *discursive*, the *material* and the *interpretative*¹ [Ball *et al.* 2012, 138]. More in detail, it has enabled us to describe our process of policy innovation as the shift of a set of statements about recruitment in the field of education from one social world (the managerialist discourse that belongs to the “paper world” of NPM recipes) to a specific spatio-temporal frame where its enactment develops through specific STAs, that is ongoing and always unstable processes of association among heterogeneities [Law 2008]. Following Callon [1998; 2007] we intend here STA to be “a combination of heterogeneous elements”, i.e. individuals as well as material, technical and textual devices “that have been carefully adjusted to one another” [*ibidem*, 322; Çalışkan and Callon 2009, 9]. *Agencement* – Callon [2007] observes quoting the legacies of Deleuze and Guattari [1987] - has the same root as agency: agencements are arrangements endowed with the capacity of acting in different ways depending on their configuration. As Çalışkan and Callon [2009, 23] argue:

the analysis of STAs highlights the role of knowledge - whether academic or not, professional or amateur, explicit or tacit - as well as of the materialities that are mobilized in the [...] process [of policy enactment]. Knowledge and materialities participate in the design, elaboration, experimentation, change, maintenance, extension and operation of agencements.

STAs are arrangements made of a panoply of connections always in a state of becoming, whose capacity of action depend upon their actual configurations.

¹ See Grimaldi [2012] for a more systematic proposal of a theoretical perspective to analyse policy enactments in the context(s) of practice that combines the sensibilities towards the discursive and the attention for the material and the interpretative.

Referring back to Callon and colleagues' recent works on the process of *economization* [*ibidem*; MacKenzie *et al.* 2007] for a deeper explanation of the key concepts and methodological stances of this approach, we will briefly point out here the contribution that in our view such a perspective offers to education policy analysis:

a) thanks to its emphasis on materiality and STAs, it does not limit agency to humans in policy analysis but shifts the attention towards the powers of association [Latour 1986]. This means focusing on effects rather than sources of power and providing interpretations that are entirely operational to action. In doing so, it suggests a relational understanding of the arrangements and co-evolutions between policy as discourse, the materialities involved in the processes of policy enactment and the bodies and agencies that policy aims to discipline. This represents a precious broadening of "the net of interpretations about what is called power" [Munro 2009, 129] in education policy analysis, that complements the more traditional humanist approaches;

b) given the centrality of the concept of performativity², the translation of Callon's work on economization in the field of policy analysis also suggests a dynamic understanding of policy enactments as contested processes of actualization of "formulas and their statements". They develop through trials of strength and "reveal problems, cause the appearance of misfits, maladjustments, untimely overflowings" [Callon 2007, 337]. The translation of a policy formula from the "paper world" to a specific spatio-temporal frame is seen as a set of successive displacements and consequent trials that make the policy formula's world become more complex through the deployment of STAs. According to the relational principle of performativity, we are suggested to look at the actualization of the formula as a conflicting process that produces struggles, overflowings and co-evolution through STAs that eventually undermine or make the formula itself change;

c) in this light, Callon's perspective suggests to look at policy enactment drawing attention to the performance struggles, that is "the cooperation [this process of actualization] triggers, the oppositions and controversies" [*ibidem*, 334] every process of policy enactment generates. This also means to take into account that devices designed to realize a statement cause other worlds to proliferate in reaction to that performance;

d) finally, the combined use of the concepts of performativity and STAs multiplies the sites and foci of policy analysis, inviting us to shift our attention towards how agencements and their associated processes of translation "take place across a

² Callon [2007, 336] defines *performance* as "the process whereby socio-technical arrangements are enacted, to constitute so many ecological niches within and between which statements and models circulate and are true or at least enjoy a high degree of verisimilitude. This constantly renewed process of performance encompasses expression, self-fulfilling prophecies, prescription and performance".

whole variety of institutions, including science, government, the factory and markets” [Munro 2009, 132].

What makes the recent perspective proposed by Callon and colleagues particularly worthwhile exploring in empirical analysis is also, in our view, its capacity to temper the sensibility towards materialities and the “how” of policy events. This occurs with: a) the awareness that enactment processes do not take place *ex-nihilo*, b) the attention to the historical dimension; c) the articulation between performativity and the structural features of a field made of networks, culture and moral communities, whose understanding probably requires the hybridization between different theoretical sensibilities; d) the place for a dynamic reading of the relations between humans and materialities [Munro 2009, 135], being the reconfiguration of agencements in the Callonian perspective the always contingent and unstable outcome of “actors” deliberate strategies and calculation on how to further their interests” [Palmas 2007, 7].

2.1. *Data Collection and Analysis*

The data upon which we have based our account of these processes of collective performance are mainly written texts and have been collected from various web sources in a period of more than one year (2011-2012). We have used only public documents, fully accessible from websites. At the beginning of our exploration, we identified the key agencies through a “snowball-like” method. We initially focused on articles concerning the new “sudden-death test” as a device and the initial policy network of the selection procedure promoters (the Ministry and its allies). Through web searches and press explorations we reconstructed the chain of STAs through which our process of collective performance unfolded. A complex assemblage of agencies and performative effects were identified, including bureaucrats and politicians, the NPM discourse, testing devices, incorrect items, experts and trainers, candidates, teachers federated and independent unions, professional associations, books, publishers, factories, lawyers, journalists, on-line blogs and forums, ICT technologies and websites.

Data have been interpreted using coding as analytical strategy [Strauss and Corbin 1990]. Firstly, texts have been coded through the creation of descriptive categories (open coding). Secondly, the establishment of connections between descriptive categories has led us towards the definition of interpretative categories (axial coding) and the identification of core categories (selective coding). The figures presented in the next pages have been constructed using the core categories that have emerged through this methodology.

Before presenting the findings of our analysis, in the next section of the article we will briefly describe the “policy problem” [Ball 2006] that the policy makers in charge of head teacher recruitment were facing, as well as the historical legacies affecting this process in Italy.

3. The Context(s) of Head Teacher Recruitment

The appeal of headship registered among Italian teachers is a longstanding phenomenon, rooted in the aspiration to advance towards the higher levels of a bureaucratic structure, which is still quite relevant in the education system, despite the most recent reforms. Far from declining as almost elsewhere in the world, the number of aspirant heads seems rather to be increasing, making the Italian recruitment process quite peculiar with respect to the international scenario and adding a particular interest to our analysis.

While education systems increasingly underline the importance of the role of head teachers as key players in educational processes, almost everywhere a worrying shortage of qualified candidates is avowed. In some contexts not only a large and well-qualified candidate pool is difficult to find, but candidates of whatever kind are lacking. In the US and Australia the inability to attract good candidates into principalship positions is a growing concern and the object of several studies [e.g. Blackmore *et al.* 2006; Gronn and Lacey 2004; Pijanowski *et al.* 2009; Thomson 2009; Whitaker 2003, Whitaker and Vogel 2006]. A set of key reasons seem to be discouraging applicants, among which are the fear of stress, the accountability pressures, the excess of time requested and the unsatisfactory salary: a lack of benefits compared with the additional sacrifices [Hancock and Bird 2008].

However, while in several countries the debate is hot on how to contrast the declining attractiveness of headship and its implications, there are countries that register an opposing trend, having to deal with large numbers of applicants and with the need to select them with effective and “fair” procedures. This is what happens in France and Italy, where a longstanding centralised recruitment system is in place. It is not the governing body of the French or Italian school that takes the appropriate legal action to hire the head teacher with the support of local authorities, as is the case in the majority of education systems, but rather the Ministry and its regional branches. The process consists of a national call, followed by an open competition based on a set of written and oral tests, in which educational staff with at least five years of experience can take part. This results in a regional merit ranking with the winners allocated to schools by the central offices.

The declared rationale underlying this policy is that once fair and effective access criteria have been established, a public and open competition engaging a large pool of applicants in a national testing is believed to be a fruitful way to select professionals who are as well prepared and skilled as they should be in order to lead at best whatever school they are designated to. This rationale is therefore far from any situated conceptualisation of the head teacher's profession; rather it emphasises the more general dimensions of the role. Priority is thus given to the historically rooted task of being "the state representative" in a virtually homogenous way, which the State centrally certifies.

With respect to locally based recruitment policies, the centralised recruitment process has several implications both at the level of the organization and of the aspirant heads. Every open competition attracts masses of applicants and requires complex and demanding management actions. On the other hand, individual candidates, dispersed in the mass of competing colleagues, experience feelings of uncertainty and fragility and find themselves navigating in a "transitory zone of professional work" [Gronn 2009] where often the fear of a clamorous failure plays a major role.

The spirit and the atmosphere of the open competition date back to the origins of the Italian public administration system (and the education system as part of it), in the second half of the nineteenth century. It revolves around a selection process which started soon to be made visible sheerly by numbers. Here the gap between the "applicants" and the "winners" stands as a powerful evidence of the state's competence in identifying the very best, in its screening a crowd of aspirants. Since the very beginning an assessment procedure combining three elements – a) the candidates' qualifications, b) their performance in a written test (an essay) and c) in an oral interview – was crucial in the process. A carefully designed assessment (at least formally), focusing on substantial professional and cultural contents, is undertaken by committees of qualified experts appointed by the ministry among peer and higher level professionals. When one reads the description of the first competitions launched at the end of the nineteenth century to select primary school head teachers, a striking similarity with what was happening until very short ago appears, despite the long time that has passed. Talking about the first competition for headship and inspectorship that occurred in 1894 in an early history of Italian education, Saraz [1922] observes: "the result of this first open competition was an unhappy one: 220 teachers applied, 190 actually participated and 27 were approved in the first session and 7 in second. It was therefore impossible for the state to count on a sufficient number of qualified head teachers" [87]. That is to say: the Ministry can only accept the very best.

Nowadays according to current Italian legislation (CCNL 15.07.10), the open competition should be launched every three years, in order to cover the posts that

have become available since the previous competition was concluded. Yet, recent history confronts us with different events. Due to bureaucratic delays and financial constraints, six years have passed since the last competition [2005] was launched. When in July 2011 the new call was eventually published, with a three-year delay, despite the unions' and professional associations' complaints, the context had undergone dramatic shifts. Retirements had left a huge number of schools led by deputies or acting heads, now willing to become real heads, while the number of teachers aspiring to headship had also disproportionately grown. As a result, by the deadline, the absurd number of 42,158 applications had been presented for 2,386 positions, with a national average of 17 applications for each post, with the proportion in regions ranging from 10 to 1 (Liguria, Genova) to 31 to 1 (Campania, Naples).

These exorbitant numbers alone resonate well with the idea of "irony of policies" [Hoyle and Wallace 2007]. They evoke a lottery atmosphere, which is probably present in the selection processes of other contexts [see Blackmore *et al.* 2006], but they also confront us with the troubling imaginary picture of an army of experienced professionals attracted by the attempt to improve their career and then suddenly rejected with crushed hopes for further opportunities. The perspective of a tough, probably even unfair and cruel selection procedure emerges and several questions arise, letting one imagine an interesting field for research on policy enactment. What underpinnings are shaping the process in such a paradoxical way? How is the process developing and being translated into practice within the constraints of this framework? What network of agencies is being involved and how do they act? What construction of the head teacher him/herself is being promoted through this selection? How are individual participants navigating the expected and unexpected challenges they are confronted with?

4. Making Merit Visible According to the NPM Formula

It is within this scenario that the intention to innovate the recruitment process emerged and new operating methods - or a new formula, in Callon's [2007] words - were needed. Indeed our process of institutional innovation can be considered as a social network to which Callon and Çalışkan's [2010] description of the market can apply:

an arrangement of heterogeneous constituents that deploys the following: rules and conventions; technical devices; metrological systems; logistical infrastructures; texts, discourses and narratives (e.g. on the pros and cons of competition); technical and scientific knowledge (including social scientific methods), as well as the competencies and skills embodied in living beings [...] (p. 3).

The size of the crowd of applicants was a main concern, and also the starting point motivating the search for new solutions. Handling dozens of thousands of candidates participating in the traditional testing system would have been an impossible challenge. Marking and scoring such a mass of written essays - on which the first step of the competition had been based for more than a century - would have resulted in an unaffordable task. A solution was needed. It was offered by a formula which emerged within the global discourse of NPM [Hood and Peters 2004], that is nowadays increasingly influential in *policyspeak* regarding the restructuring of public administration in the European space. Figure 1 represents the key statements of the formula about how to select candidates on the basis of a merit-based, fair and effective procedure.

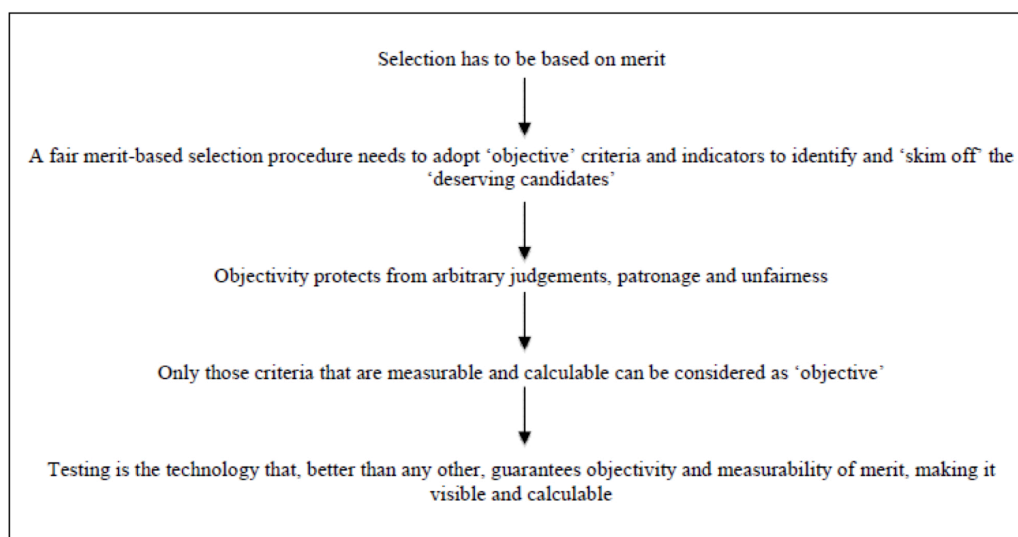


FIG. 1. The NPM formula about merit-based selection of candidates to the role of head teachers.

The key device within this formula about the “meritocratic selection” of candidates is the preliminary multiple choice test, that we can consider a “sudden death test” in that it aims at eliminating a large part of the applicants with a quick procedure which has no appeal: those who do not hit the established threshold of correct answers are eliminated. After the first screening the “surviving” participants would be entitled to go through the substantial competition: a renewed version of the traditional essay system, to be followed by an interview for the candidates who have written successful essays.

A multifaceted and appealing rationale was underpinning the construction of the formula: the pressure to appoint the new heads after too many delays was making it urgent to adopt a quick method to screen the crowd. Technology could well

support the setting up of the suitable tools together with their efficient use, and this could result in a very effective process. Far from any risk of external influence and any shadow of corruption, this process could be shaped by the “objectivity” of the machines, offering a real opportunity to enact a truly meritocratic selection and, at the same time, reducing costs.

Calculability was at the core of the social engineering leading to the construction of the “sudden death test”. The screening had to make a clear design visible, where qualified and sophisticated contents were combined with fair assessment criteria and clever procedures. With its combination of mechanic tools, regulations, logistical strategies and materials the test administration and scoring had to embody the new meritocratic turn characterising the education world as well as the overall public administration. The successful aspirants passing the test would have constituted an ideal pool of qualified professionals among whom to select the most suitable professionals to appoint.

5. The Inventory of Agencies and the Diversity of Agencement: New Assemblages and Associations

As soon as it was announced, in 2011 the “sudden death test” became a key spokesperson [Callon 1986] in the process of actualization of the NPM formula for a merit-based screening of the aspirants to the role of head teachers. The politicians and bureaucrats of the Ministry of Education in charge of the design and the enactment of the open competition to select the 2368 new head teachers enrolled the test as the crucial change in the process of institutional innovation they affirmed to pursue. In its announcement published on 13 July 2011 [MIUR 2011] the Ministry of education declared the “sudden death test” to have the ambitious aim of “checking the candidates’ mastery of the basic knowledge that is required to take on the role of head teacher in 8 thematic areas” including ICT and language skills. The test procedure was described as follows:

The first step of the competition consists of a test structured in 100 multiple-choice items. Candidates will have 100 minutes to complete the test. Candidates will be graded up to a score of 100 for a test where all the answers are correct; for each missing or wrong answer the score will be 0 but no penalties will be assigned. [...] Candidates will pass the test with a minimum score of 80/100. [...] Candidates’ tests will be checked through a software. [...] Test results do not contribute to the final merit judgement in the next steps of the open competition [MIUR 2011].

We can see how this description along with the detailed test structure is a fundamental statement about the process which starts to create its own world: it provides

a clear picture of the test criteria and implications and orientates the action, implicitly inviting a plurality of actors into the scene and originating different STA. First of all – we learn - coping with the test will be a matter of speed (1 minute per item), trial and error will be acceptable (no penalties for wrong answers). Practicalities will have a strong impact: optical scanning will mean needing to exercise caution in ticking the answer boxes. Finally, no score benefits are foreseen for a successful candidate in this test, apart from being allowed to take the second test. The test thus has a series of characteristics that require appropriate training and rehearsing on the part of candidates.

The test thus entered the policy scene, contributing to a complex process of re-configuration of the bureau-professional STAs through which head teachers had been previously trained and selected after the school autonomy reform in the late 1990s [Serpieri 2009]. It acted, as we shall see, as a powerful disciplinary technology that governed the conduct [Dean 2010] of a vast array of subjectivities. In fact, within this scenario, the advent of the testing method mobilized a panoply of new assemblages and associations between human actors, technologies, devices, discursive ensembles and digital and material spaces. Some of them were already part of the pre-existing STAs, whereas others were enrolled and/or found new spaces of action. Interestingly enough, in a complex chain of collective performances, their identities, configurations, connections and possibilities of action changed in a new unstable, uncertain and contested process of ordering [Law 2008].

5.1. *Inside the Device and its Construction*

The map reported below (see Figure 2) tries to represent a first section of the processes of assemblage we tried to grasp. Of course, mapping is used here and below as a heuristic tool to summarize the outcomes of data coding [Ball *et al.* 2012], proposing an inventory of agencies, accounting for the diversity of agencements and, in doing so, reducing complexity.

Figure 2 describes a set of associations that configures a section of the new STA through which head teacher selection happens. The “sudden death test” takes the floor as an indisputable (although still virtual) device, which is legitimized by the NPM merit-based formula as an effective, objective and fair technology to select deserving candidates. The performative power of the formula affects the identities of the politicians and the bureaucrats who enrolled the test. They become entitled to present themselves in the public arena as the “champions” of innovation and merit, struggling against bureaucracy, ineffectiveness and patronage. Selection based on

testing, as opposed to discretion and unfairness, stands out as rooted in the modernist discourses of “scientificity”, “objectivity” and “measurability” [Rose 1999]. The “benchmarking” argument also reinforces the establishment of testing as an OPP, being such a technology adopted in the selection procedures of several OECD countries, although mainly for different roles.

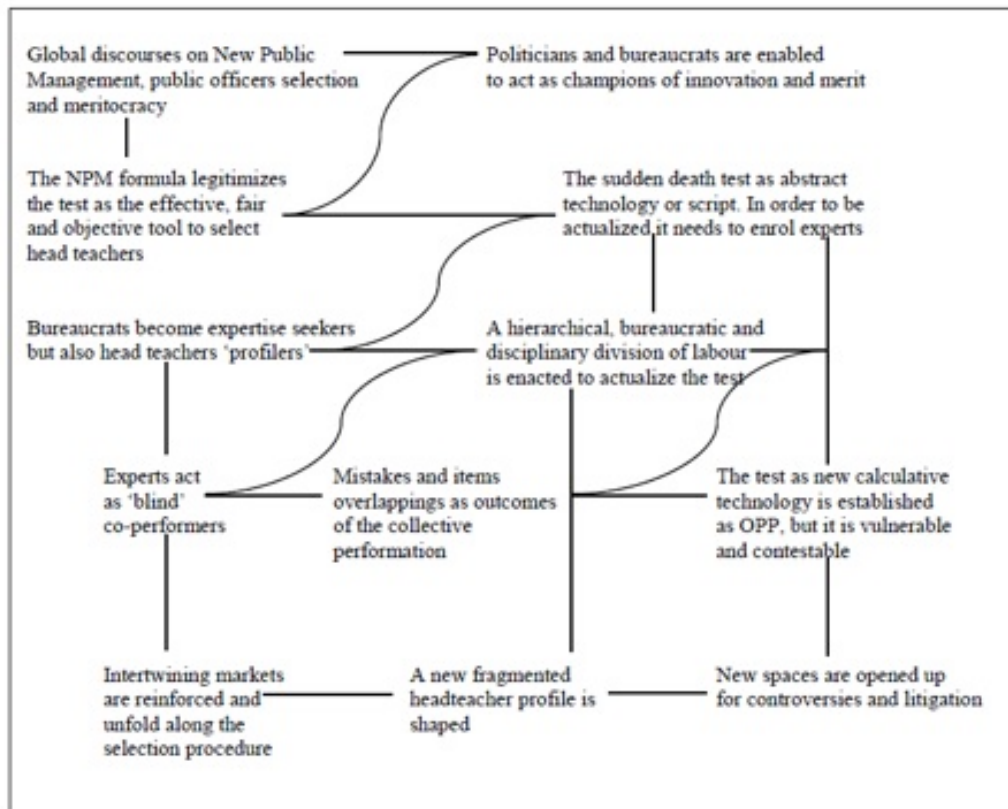


FIG. 2. Sudden death testing and its STA. A first take.

Multiple associations develop in the actualization of the initial formula. In fact, the “sudden death test” is still an abstract technology at the first stage of the enactment of the new STA, being a script [Akrich and Latour 1992] that needs to be actualized. Although disciplining effects are already inscribed in the test design, the need emerges to enrol experts who are asked to create the items and, in doing so, to make the already-designed test structure actual. The bureaucrats of the Ministry of Education suddenly become “expertise seekers”: in the urge, the enrolment of these experts happens according to mechanisms of choice apparently based on belonging and reputation. Inspectors, professionals, retired head teachers, non educational experts and academics are connected to the new STA. The configuration of the new set of associations between the test as device, the Ministry as client and the experts as

test “co-producers” reveals a hierarchical, bureaucratic and discipline-based division of labour, where the experts are connected in a one-to-one relation to middle-level collectors of the items, who in turn send them to those at the top of the chain. The experts are subjectivated as “blind” experts, who contribute to a collective performative task. The procedure only allows them a limited understanding of the overall design of the device and, in the absence of a shared understanding of the codes to be followed, mistakes, overlappings, ambiguities become the obvious products of such a set of associations.

While the test construction develops, a complex negotiation starts involving the Unions and the Ministry concerning the release of the test items. The candidates – the Unions insist - should be made aware of the item bank from which the 100 items will be randomly extracted, in order to train and rehearse. In September 2011 a database appears on the Ministry of Education website containing the 5663 multiple choice items (4 options per stem) with the “correct” answers. Only a few hours pass from the item release when the first overflowing becomes evident: the candidates throw themselves over the items, eager to understand what kind of materials they will be faced with when the crucial day comes. They soon discover that several items report incorrect answers. “Just as through their very action a badly calculated boat (...) or a wrong calculated theorem reveal unsuspected worlds” [Callon 2007, 350] the expected-to-be “prestigious” and innovative test “sets in motion events that without it would not have happened and that, once taken into account, lead to new STA” [*ibidem*]. A sort of treasure hunt starts on the part of the candidates leading to the discovery of new errors, while the news is reported by several newspapers in ironic terms and becomes the focus of wide debates on professional websites.

The Ministry’s officials could not even imagine the possibility of a high number of mistakes: when the first warnings started to arrive they thought a quick “Errata corrige” could have applied. However, when the enormous number of mistakes became evident, they could not but cancel the wrong items from the list. In fact the test construction reveals the paradoxes of a system which tries to follow the global impetus to technological testing, without fully understanding its technical requirements [Bottani 2011]. These counter-performations [Callon 2007] seem to be a clear evidence of what Kamens and McNely [2010, 6] call the taken-for-granted assumption attitude towards technological testing.

Table 1 summarizes the performative effect of the process of future head teachers “profiling” that we have described above. A complex picture of the qualified aspirant head teacher emerges from this unintended and cumulative process of assemblage:

TAB. 1. *The head teacher's competence profile and its calculation algorithm.*

Area	Subjects	Items	Mistakes
Area 1: European Union	European regulations; EU governance structure; EU ET frameworks; School systems in Europe; History, structures and regulations of the Italian Education System; Lifelong learning; Functions of local governments in education	741 items	97 (13,09 %)
Area 2: School leadership and management	Pedagogy; Didactics and special needs education; Social psychology; School autonomy regulation; Planning and project management; Territorial governance; Accounting and administration.	687 items	137 (19,94 %)
Area 3: Regulation, administration and budgeting	National and European law on education, work, health and safety and welfare; Civil law; School budgeting; Elements of national accounting.	750 items	83 (11,07 %)
Area 4: Socio-psycho-pedagogical area	Pedagogy, Didactics and special needs education; Psychology of learning; Educational evaluation (learning evaluation, school and system evaluation); Theories and techniques of new media.	728 items	60 (8,24 %)
Area 5: Organization, human relations and communication	Intercultural pedagogy; Sociology of education and migration; Sociology of organization and work; Regulation on immigrants' education; Human relation management; Institutional communication.	709 items	179 (25,24 %)
Area 6: Leadership and management in complex organizations and school	Theory of complex organizations; Formal and informal communication; Leadership and human resource management; Strategic planning; Management control and accountability.	796 items	185 (23,24 %)
Area 7: ICT advanced skills	Hardware and software: basic concepts; Computer-based work; Internet; Applications for office automation, school management and health and safety; Multi-media didactics.	250 items	43 (17,20 %)
Area 8: Foreign language (one choice between French, English, Spanish or German)	Items to check the language skills at the B1 level of the European Union framework.	251 items	55,5 (average) (22,16%)

As part of a wider process of head teachers' subjectivation, such a profiling further develops a radical re-configuration of the features of headship that started in 2000, along with two policy initiatives: a) the compulsory training activities that interested the Italian head teachers after the school autonomy reform, and b) the first procedures of head teacher recruitment enacted in 2004 and 2006, where a model of selection/training was experimented as a device to appoint head teachers [for a detailed analysis of the processes of headship formation enacted through these training/selection processes see Serpieri 2009].

5.2. *From "Universal" Aspirations to Knowledge Fragmentation and Overflowings*

With the set of stems and options they produced, the groups of "blind experts", enrolled for each area on account of their belonging and reputation had therefore contributed to draw a hectic profile of the head teacher. Here we could say that a re-configuration trajectory comes to a framing point. And the core of this profile is further hybridized with issues coming from social worlds that since the school autonomy reform had started to challenge the bureau-professional STA. These are management and accounting, communication and ICT, foreign languages. With law and the knowledge of regulations still playing a central role in the profiling. Overlapping, confusion and loose-definitions seem to be the prevailing traits of the product of this collective performance, and make evident traces of a process of subjectivation of the aspirant head teachers. Experienced teachers, whose identity were performatively shaped in a social milieu where professionalism and bureaucracy were the main discourses enacted in practice, are asked to socialize with "mysterious" and technical subjects coming from the worlds of business and management. A dispersed process of future head teachers "profiling" takes place. In fact, the item production represents the actualization of the "sudden death test" as a selection device, however at the same time it provide an outline of the competences that the desirable head teacher has to develop. The emerging profile is therefore the paradoxical outcome of an assemblage of conflicting logics, vocabularies, understandings and values that are internal and external to the professional space.

What we have described is thus a performative chain through which the "sudden death test", as a virtual technology, contribute to perform a formula belonging to the paper world, enrolling and shaping the identities of new agencies, and enabling them to act. Yet, in spite of what had been declared, the test becomes a vulnerable and contestable technology, due to some overflowings or counter-performance [Callon

2007]. The STA that we have observed seems to be unable to discipline and frame the entities that it assembles and, as such, opens spaces for controversies and litigation. Moreover, as we will see in the following paragraph, it creates the possibilities for multiple associations, where new agencies that are external to the professional space can exert significant influences. They subjectivate candidates and future professionals within the intertwining of markets which develop along with the public procedure of selection or are reinforced by it. The device designed to realize the statements of the NPM formula about the fair and objective selection of deserving candidates originate other worlds, which proliferate in reaction to that performance [*ibidem*, 341].

In the next paragraph we will explore more in detail the following performative effects of this initial step of the process of STAs' reconfiguration and its overflowings:

- a) the reinforcing and unfolding of markets as an unattended performative outcome of the STA reconfiguration;
- b) the related opening of new spaces for litigation and controversies.

6. The Unfolding of Markets

A key point needs to be highlighted here to further develop our argument. This concerns the reinforcing and development of intertwining markets around the selection procedure. Indeed they are at the origin of a series of STAs that is interesting to explore. When the “sudden death multiple choice test” was announced, long before its detailed characteristics had become clear, a rush started among commercial publishers and professional associations to produce training materials and organize workout sessions. This rush began in 2010 when the first draft of the call (e.g. www.disal.it/Objects/Pagina.asp?ID=12324) started to circulate and it became even more intense after the publication of the official version. New spaces for experts, authorities, trainers and mediators opened up. Ambiguity and uncertainty dominated the scenario, with candidates asking themselves where to find reliable references to study for the test.

But ambiguity and uncertainty must be reduced to face the test and are quickly commodified: “expert” and reliable knowledge about the test subjects becomes a precious and valuable commodity to be sold to an “army of lost candidates”, resulting in an intense circulation of money. Experts from the fields/subjects listed in the Ministry public announcement fabricate tailored-products: management experts, academics, retired professionals, influential in-service professionals, jurists, consultants write books, give speeches, hold lessons. Unions and professional associations establish themselves, together with some publishers as the main organizers and sup-

pliers of training. A flourishing of dedicated books, on-line databases and learning environments, test simulation applications and courses appears on the scene (in a similar vein to what happened for head teacher training and selection since the school autonomy reform). All of them promise to offer the knowledge to “stand the test”: *Pass the open competition. To be a head teacher* is the title of one of the best-sellers. *I will be a head teacher. How to pass the test of the open competition*, is the title of another book. A correspondent rush takes place among candidates towards courses, books and publications produced by those organizations and experts that are (or more precisely are able to informally qualify themselves as) closer to the Ministerial bureaucrats in charge of the test and/or well informed about the latest decisions about its format and characteristics. It is important to notice that these unfolding markets grow intertwiningly with other market-like STAs and, as such, are part of a wider and more and more pervasive process of marketization [Çalışkan and Callon 2009; Çalışkan and Callon 2010] in the field of education.

While the test construction was completing the process of actualisation of the device, several simulations are produced by commercial companies interpreting the general contents mentioned by the call for proposal. When the Ministry’s public announcement listing the thematic areas of the test and later on the item database itself are released, the correspondence appears evident between their content and several commercial products already available through the market. In other words: the final device results to be the fruit of a chemistry where the “ministerial experts” work melts in with that of the market.

Along this process thus, the described STA performs the ground for the conception and construction of an intertwining of markets in which candidates are transformed into competitive agencies obsessed by the development of their skills and competences in order to become “deserving”.

It is to be noticed that a certain tradition of “training markets” have since long accompanied open competition, with courses, publications and consultancies sold to the candidates to support their preparation. However it becomes clear here how the materiality of this new device, and its calculative mechanisms, act as multipliers of the opportunities for products to sell/buy. The candidates want lists, software, effective presentations which lead them to become speedier, to learn by heart, to become familiar with computer devices. They want a variety of learning experiences concerning test taking in itself, not the contents of the head teacher profession.

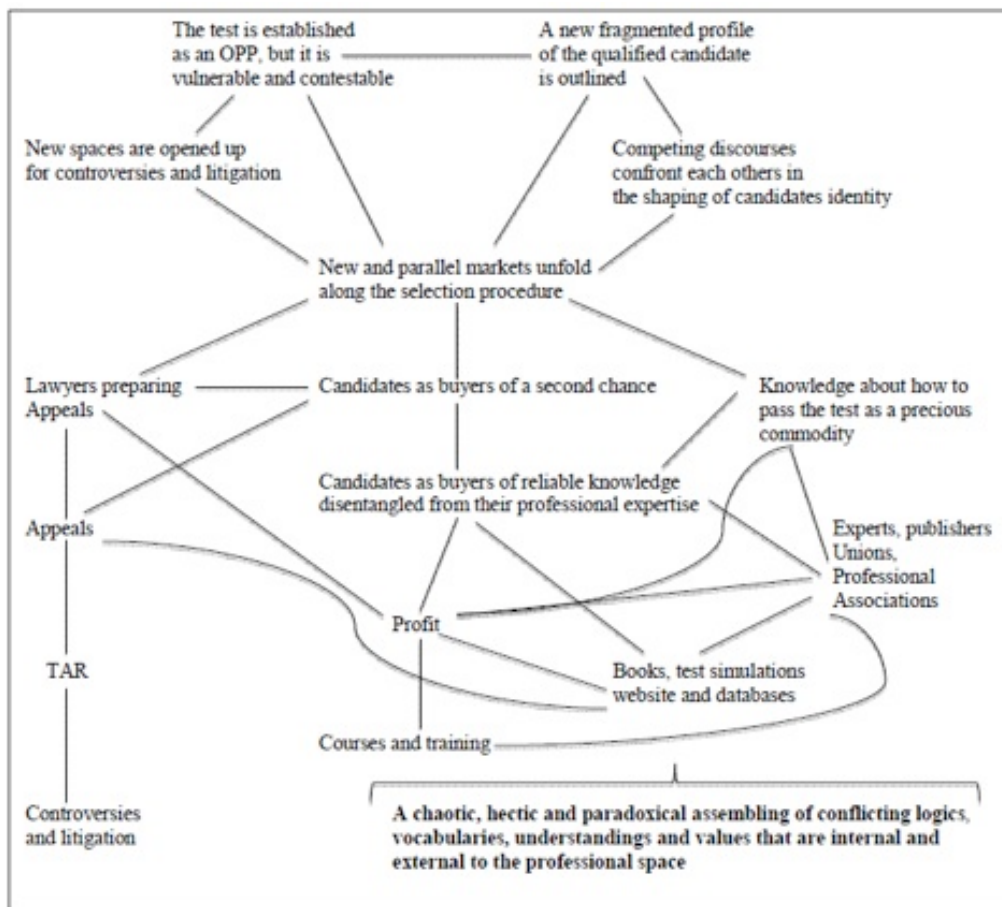


FIG. 3. The unfolding of markets: a chaotic, hectic and paradoxical assembling of conflicting logics.

In the actual displacement of these markets we witness a crucial disentanglement, that once again reinforces a dispersed but pervasive process of subjectivation of head teachers whose origins can be traced to school autonomy reform. Interestingly enough, the STA developing around the test shapes candidates as competitive individuals and tends to equip them with tools, instruments, prostheses (obviously distributed but under the control of particular agencies which do not belong exclusively to the professional space) and rights. They want to gain the competences and skills to be a “deserving candidate” more than an effective head, and to be granted the most effective resources to develop them. But these are not the resources actually available to experienced teachers with several years of professional practice. On the contrary, we are presented with a crowd of experienced teachers that are disentangled from their professional identity in the very moment when they aspire to become the heads of the schools where they have worked for long. The competences they have to perform to survive the screening are somehow “encyclopaedic” and relatively far from

professional practice. What emerges in the dispersed nature of the test assembling and in the actualization of its subjects seems to be regulated by the “anarchy” and asymmetries of a market, where multiplicity of agencies operate and overlap. Rather than with the mirror of a coherent profile, the test confronts us with a chaotic, hectic and paradoxical assembling of conflicting logics, vocabularies, understandings and values that are internal and external to the professional space. Agencies belonging to the professional space tend to emphasize the centrality of educational issues and the related sciences. The inheritors of the legal-bureaucratic tradition stress the mastery of regulations as the keystone of head teacher knowledge. Champions of NPM take the chance to promote a new managerialist understanding of headship, insisting on leadership, human resources management, entrepreneurship and budgeting competences. What “deserving” means in the term “the deserving candidate” becomes the outcome of co-performance in which managerialist discourses, in particular, seem to have increasing voice and to challenge the bureau-professional heritage of head teachers identity in the field of education. Moreover, overarching all this there are the test technicalities, requiring a specific training on their own: how to read fast, how to tick appropriately, what to do with your uncertainties, how to organise your test taking strategy.

Another market unfolds, as the performative effect of the vulnerable and contestable nature of the test. Far before the test day, the mistakes and overflowings occurring in the items let many people imagine that a “shower” of complaints and appeals would take place. Lawyers sharpen their knives and enter the scene highlighting points of potential contestability in the design of the selection procedure. Lawyers’ associations propose themselves as guardians of fairness, promising that they will be able to guarantee the passing of the test even in case of low scores through the appeals procedure. Through a panoply of channels (unions, peer-to-peer, professional associations, websites and forums/blogs) candidates themselves exchange information about class actions to be presented to the Regional Administrative Judges (TAR) by those “skimmed out” by the “sudden death test”. These rumours become even more noisy and frenetic when the first news about the mistakes in the items become of public domain. Blogs and forums become spaces of intense exchange of information and negotiations. The competitive candidates become cooperative when a “life preserver” has to be found and shared in order to save money. Specifically invited by lawyers’ associations, complaints and appeals end up embodying the new, final hope for revival of the “exterminated” candidates, thus reinforcing the lottery atmosphere surrounding the competition and originating further circulation of money.

Furthermore, we may consider the development of a market area linked to the competition and the new testing device on the mass media. Educational staff

recruitment is a topic that touches the public opinion's imagination. People have a certain curiosity in learning about how their children's evaluators are evaluated and screened. The news about the competition has now become quite easy and attractive to report as the broad press coverage shows. Visible as it has become through its new background of numbers and calculative mechanisms (e.g. number of items in the test, number of wrong items prepared by the experts, number of minutes per item, number of aspirants, number of successful/failing candidates...), they can quickly slip into stories to be told in friendly, soccer-style texts. Journalists are greedy for news from "the battlefield", nor is there a lack of possible interviewees to provide evidence of what is happening in the candidates' preparation process. Intense exchanges of information therefore occur, with different opinions expressed by a variety of sources, feeding a new social network.

7. Conclusion

Multiple-choice tests are nowadays becoming key calculative technologies [Callon and Muniesa 2005] in the field of Italian education policy, in the scenario of what has been called elsewhere the *evaluation turn* [Grimaldi and Serpieri forth.a; Serpieri 2012]. The actualization of testing as key technology and the unfolding of the groups, techniques, inscriptions and courses of action constituting new hybrid STAs seems to become an obligatory passage point [Callon 1986; Clegg 1989] in any process of selection, recruitment and evaluation in the field of education. This is confirmed, for instance, by the current Italian procedure of teacher selection that has pushed the use of standardised tests one step forward to "skim off" and select candidates in a national open competition through even newer standardised tests and technological devices. As Callon [2007, 350] suggests, "what explains the deployment of [these worlds] is the ticker and [...] circulation" of the technology of testing.

This article has offered a dynamic picture of a fragment of such a wider trend, where the translation of a virtual technology, a sort of "sudden death test", has radically changed the STAs through which future head teacher selection and recruitment happens in Italy. In doing so, it has performed the power to unsettle a relatively stable STA inspired by bureau-professionalism [see Serpieri 2009; Serpieri 2012; Grimaldi and Serpieri forth.b on the formation and evaluation of headship in Italy]. We have highlighted how the test entered the scene of head teacher selection as a magic tool to solve a policy problem: how to handle the huge crowd of aspiring candidates. Its legitimacy stemmed from a formula inspired by the NPM discourse that designed a hypothetically fair, effective and merit-based procedure where the test becomes the

most effective technology to skim off the crowd of candidates and identify among them the “most deserving”.

Following the actor “test” [Latour 1987] and its associations, we have explored parts of the actualization of such a NPM-inspired formula, interpreting it as a series of adjustments and overflowings [Callon 2007]. The open competition to select new head teachers is still in progress, although in its final stage. Then, we are not able to offer any evidence about the fulfilment of the conditions of felicity [*ibidem*] of the initial NPM formula inscribed in the test as a pre-screening device. However, our aim is not to address this question.

We intend instead to focus on the performative effects of the establishment of the “sudden death test” as an OPP in a new STA. We have grasped some crucial *agencements* that actualized the formula and the virtual test device and, above all, we have tried to describe their capacity to cause other worlds to proliferate as a reaction to that performance.

What has emerged is a story of arrangements and co-evolutions involving policy discourses, materialities, bodies and agencies, whose associations have originated new processes of objectivation and subjectivation [Foucault 1982; Foucault 1991a], as well as opening up new spaces and possibilities for acting and thinking [Ball 2006] about headship, its design and recruitment. In fact, we have been able to account for a set of performative effects of the series of adjustments and overflowings that have characterized the actualization of our NPM-inspired formula.

7.1. *Testing as a Contestable and Vulnerable OPP: A Paradox?*

A paradoxical performative effect seems to emerge from the new STA. Through a complex process of assemblage the multiple-choice test is established as a fair, meritocratic and effective technological OPP. The test acts as the key entity of the new *socio-technical agencement* in our story. Measurement through test (testing) becomes simultaneously a theory of effective selection, a theory-based technique for identifying effective heads, a standardised and standardizing technology ready-to-use. But the STAs through which the test is actualized also makes it vulnerable and contestable. The magic tool and its legitimizing formula reveal themselves as fallible, due to the association (and tensions) between bureaucratic, professional and disciplinary legacies and the ambiguities of the new operating method. In spite of its vulnerability, in the current frame, sudden-death testing seems to resist and, indeed, gain increasing centrality in the current evaluation and selection practices in education.

7.2. *The Commodification of Knowledge about Testing and the Unfolding of Markets*

Knowledge about test construction and functioning, but also about its malfunctioning, is transformed into a commodity [Lyotard 1984], sold by a heterogeneity of publishers, companies, experts, lawyers, technicians, unions and associations, who are attracted by the opportunity for profit. Around this commodity intertwining markets are reinforced and/or emerge as spaces of co-performance, while a media discourse develops at the same time. Interestingly enough, on account of their gaining a central role in these markets, publishers, experts, lawyers and the other panoply of entities involved in the production of such a commodity become, in an unpredictable way, influential agencies in the design of both the selection procedure and of the set of competences that are needed to become head teachers. A second paradox emerges here, where new STAs functioning according to the “*laws of the markets*” [Callon 1998] becomes the regulated spaces that frame the struggles around the design of both professional identities and selection/recruitment procedures. This is not an isolated event, as we said above, but a trend that is observable in many other educational settings [Grimaldi and Serpieri forth.c; Serpieri 2012].

7.3. *Disentangling and Fragmenting Professional Identities*

A new paradoxical headship design emerges, that is hectic and fragmented, where conflicting discourses clash and multiple vocabularies co-exist and co-opt each other in a complex game of discursive formation [Foucault 1972]. What emerges, however, is a clear “challenge” that managerialist discourses seem to set against the bureau-professional identity of the head teacher. Two further effects of subjectivation have arisen from our story. First, the “commodification of knowledge” and the related unfolding of new market have paradoxically subjectivated the candidates both as competitive agencies obsessed by the search for reliable knowledge/commodity about the test contents and as belonging to a “solidaristic community” in search for a life saver in case of “sudden death” in the competition. A sort of mobilization of new consumers [Miller and Rose, 2008, 114] takes place. Secondly, candidates are disentangled from their professional identity and knowledge background. This suddenly becomes useless in a process that focuses on becoming a deserving candidate mastering a mechanic tool, rather than a competent head teacher.

What are the outcomes of these processes of collective performance and their related struggles? We are not able to offer a fully satisfactory answer here but only a provisional one. What the article shows is how the result of this process of institution-

al innovation/collective performance is a “workable compromise, which translate[s] into a socio-technical agencement consisting of bits and pieces” [Callon 2007, 348], and which partially, but only partially, makes the assertions of both managerialism and bureau-professionalism true. As Callon highlights in his analysis of markets, at the end “we find elements of the different competing socio-technical agencements” and “the world that ended up existing [results as] a patchwork, cobbled together with elements from competing worlds” [*ibidem*]. In our view, one of the added value of the Callonian perspective for policy analysis lies exactly its capacity to show how:

none of the protagonists is able to push their own program through to the end, for none of them is able to completely frame the world that they create. They can only adopt a logic of compromise in which some elements of their world are realized and others are not [*ibidem*].

What we can point out here is that the struggles around the design of both the head teacher professional identity and the selection/recruitment procedure end up with the dismissal and replacement of some core statements and devices belonging to the world of professionalism that appears to be the “loser in this affair”. How the *socio-technical agencements* we have described, and the related processes of subjectivation, commodification and marketization, will develop is a matter of concern for future research.

We believe that the analytical tools we used proved to be particularly useful to make sense of what is happening in a problematic area such as that of educational staff recruitment, which engages many different actors and contrasting interests. They allow to collect the traces of events, sometimes already well-known, but fragmented and dispersed. This can be combined in accounts which provide new multifaceted understandings and interpretations.

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NPM Discourse, Testing, and the Selection of Head Teachers

Education Policy Innovation as a Collective Performance

Abstract: In this article we examine a process of policy innovation in the field of education, focusing on the conditions under which a new mechanism for selecting head teachers through testing, inspired by NPM discourse, comes into being as a new “regime of practices”. We combine sensibilities derived both from *governmentality* studies and tools from the ANT-inspired research framework developed by Michel Callon on performativity, focusing on the actualization of the new testing device (and its related formula) that makes more calculable the core of a process formerly based on professional appraisal and peer judgement. The work highlights a set of paradoxical *performations* of the *socio-technical agencements* (STAs) through which the new formula on candidate selection is actualized: a) the making of the test as a contestable and vulnerable obligatory passage point; b) the commodification of knowledge about testing and the reinforcing and opening up of intertwining markets; c) the disentangling and fragmenting of aspiring head teachers’ professional identities. In this context the dismissal and replacement of some core statements of the bureau-professional discourse seem to emerge through the dispersed process of re-designing both the head teacher’s professional identity and the selection/recruitment procedure. The world of professionalism appears to be the “loser in this affair”.

Keywords: educational staff recruitment, head teachers, performativity, socio-technical agencement, governmentality.

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