Teacher Expertise in the Global South

Theory, Research and Evidence

Jason Anderson

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There are many expert teachers working in the global South and we can learn a great deal from them. Neither of these claims should be surprising, yet to date, there has been almost no research conducted on expert teachers working in Southern contexts. Instead, the huge sums of money invested in attempting to improve teacher quality in the South have frequently been directed towards introducing exogenous practices or interventions that may be culturally inappropriate, practically infeasible and ultimately unsustainable – often failing as a result. In this pioneering book, Jason Anderson provides an authoritative overview of the practices, cognition and professionalism of expert teachers working in low-income contexts. By drawing upon both systematic reviews of teacher expertise and effectiveness research, and his own fieldwork in India, he argues that without an understanding of expert teachers working in all contexts worldwide, we cannot truly understand expertise itself.

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ABBREVIATIONS

AINET	name of Indian English teacher association (full form no longer used)
ASER	Annual Status of Education Report (large annual survey run by Pratham)
BM	behaviour management
CBSE	Central Board of Secondary Education
CEFR	Common European Framework of Reference
CPD	continuing professional development
CSF	Central Square Foundation (Indian NGO)
DiF	diversity in findings
ELT	English language teaching
EMI	English-medium instruction
ERIC	Education Resources Information Center (online library)
ESRC	Economics and Social Research Council (UK)
ET	expert teacher
FL	foreign language
HOTS	higher-order thinking skills
ICT	information and communications technology
IRF	initiation–response–feedback
JA	Jason Anderson (interviewer in interview extracts)
LCE	learner-centred education
LoE	lack of evidence
LOTS	lower-order thinking skills
MA	master of arts
MEL	more enabled language
MOI	medium of instruction
MSBSHSE	Maharashtra State Board of Secondary and Higher Secondary Education
MSBTPCR	Maharashtra State Bureau of Textbook Production and Curriculum Research
NCERT	National Council of Educational Research and Training

NGO	non-governmental organisation
Obs.	(lesson) observation
OECD	Organisation for Economic Co-operation and Development
PCK	pedagogical content knowledge (see Shulman, 1987)
PD	professional development
PISA	Programme for International Student Assessment
PT	participant teacher
RIE	Regional Institute of Education
SCERT	State Council for Educational Research and Training
SL	second language
SS	students
TA	teacher association
TAI	teacher achievement index
TESOL	teaching English to speakers of other languages
TESS	teacher education through school-based support
TIMSS	Trends in International Mathematics and Science Study
TLMs	teaching/learning materials
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations International Children's Emergency Fund
VITAE	Variations in Teachers' Work, Lives and Effectiveness (Day & Gu, 2007)
WCT	whole-class teaching

1   Introduction

I was led by my colleague across a dusty school playing field under the baking mid-morning sun in a poor suburb of Asmara. At first, it seemed that the school was deserted, as almost all schools in Eritrea are on Sunday mornings. But as we approached the classrooms, we began to hear voices inside. We approached one classroom quietly and peered in. Two students were standing in front of fifty or so others, the dismantled parts of an old broken computer on the desk before them. They were explaining to their classmates about the various parts of the computer and how they worked, while the latter quietly took notes and sometimes asked questions. Our arrival hardly disturbed them. These students were used to visiting *tsadas*.[1] We sat at the back and watched a whole lesson taught by these two 'tutors'. After the presentation came groupwork, in which the students discussed and compared notes on exam-type questions that one of the tutors had written on the board. Then the tutors paused the groupwork and began questioning elected group members, often probing them for further information and testing their understanding. Occasional mistakes were corrected by classmates or tutors in a spirit of discovery rather than criticism. The lesson concluded with the tutors inviting any further questions from peers. This was one of three classes of over 150 students in total, all of whom voluntarily came to school on Saturdays and Sundays, and had learnt to teach each other under the guidance of their teacher, Matiewas Ghebrechristos, who we subsequently found sitting quietly at the back of one of the other classrooms. His weekend 'science club', now in its fourth year, included lessons in almost every subject on the curriculum and many that were not (e.g., 'green club' and 'drama club'). Matiewas is well known – during my

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[1]   *Tsada*: lit. 'white' in Tigrinya; used to refer to (white) foreigners.

two years in Eritrea as a volunteer teacher trainer, I was one of many who was taken on the pilgrimage to his school. To some extent, he was the *tsada*'s model teacher – evidence that a learner-centred pedagogy could work in Eritrea, at least in extracurricular education. Yet there were many other effective teachers across this financially poor country – not all were learner-centred in their approach, and very few known about. These teachers taught me two valuable lessons during my time there: that effective teachers are not exclusive to the global North, and that they are not all alike…

1.1   WHY THIS BOOK?

It is a self-evident truth that teacher quality varies in any educational system. There are good teachers and bad teachers everywhere. It is also self-evident that documenting and sharing knowledge about the practices of good teachers – the key focus of teacher expertise studies – is of use, in multiple ways, to educational systems around the world. This is particularly true of low-income countries in the global South (Nordstrum, 2015; Pryor et al., 2012; Westbrook et al., 2013), where improvements in quality in education are often urgently stressed by Western bodies as priorities in the battle to reduce poverty and support both social and economic development (e.g., UNESCO, 2014). Despite this, and despite the huge sums of development aid invested into quality-related interventions every year, it is a surprising reality that 'there is remarkably little good evidence on the effectiveness of different pedagogical practices in developing countries' (Muralidharan, 2017, p. 377). As Pryor et al. note:

> The knowledge base of successful teaching in low income contexts is not suffi-ciently developed. Much research has concentrated on the deficiencies of teaching in low income countries and we therefore have accounts of poor practice and pupil failure. What we do not have are detailed descriptions of teachers' good practice in contexts that are challenging. There is a need for research to seek out examples, to theorise them and to make them available as a resource for teacher education and policymaking. (2012, p. 498)

In this book, I offer evidence to support two claims: that there are many capable teachers working in the global South and that we can learn a great deal from them. Neither claim should be surprising, but the fact is that attempts to improve the quality of education in the global South have sys-tematically overlooked these teachers for decades, if not centuries, due to

biases prevalent in both assumptions and prejudices concerning the global South and in preconditioned beliefs concerning what good teaching is, and what it looks like in the classroom. Matiewas Ghebrechristos is an extremely hard-working and effective teacher who stands out (to me) due to his dedication to his science club and also possibly because he teaches in ways that reflect prevalent Northern beliefs concerning what good teaching is (I chose his example above to illustrate a point to those who share these beliefs). Other examples of 'outstanding' teachers working in the global South as identified by Northern organisations include three of the seven winners of the Global Teacher Prize to date (Hanan Al Hroub of Palestine, Peter Tabichi of Kenya and Ranjitsinh Disale of India).[2] As impressive as these teachers are, this book is not really about them. It is more about the many teachers who have reached a level of expertise such that we can learn about appropriate good (not 'best') practice from them, help others (if appropriate) to emulate them, and identify achievable, sustainable thresholds of expertise for the majority of teachers in an educational system such that achieving them would improve the quality of learning for large numbers of learners (Hattie, 2015).

As a teacher educator who has spent much of his career working in low-income countries (discussed further below), I have learnt that whenever these initiatives originate in local practice, they are more likely to be successful than if they are 'imported' from other contexts – the latter often resulting in what Holliday calls 'tissue rejection' (1994, p. 134) for numerous reasons, including *feasibility* (e.g., logistically), *appropriacy* (e.g., culturally) and *sustainability* (e.g., cost-wise).[3] There is an extensive body of literature stretching back over 100 years supporting Holliday's claim that it is neither possible nor desirable to transplant aspects of pedagogy in such ways (see, e.g., Canagarajah, 1999; Sadler, 1900; Tabulawa, 1998; Vavrus & Bartlett, 2012). Yet, when good practice originates in the context in question, such innovations are more likely to succeed for the same reasons in reverse (Sternberg, 2007). As Verspoor (2005, p. 38) observes, 'would it not be preferable to design innovations … that do not deviate too far from existing practice, that can be adapted and applied by a large number of teachers without too much difficulty…?' I would go further and argue that

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[2] www.globalteacherprize.org
[3] These three factors, feasibility, appropriacy and sustainability, are returned to regularly in this book as key basal requirements for any (innovative) practice to be potentially successful.

it is preferable to source such innovation in the existing practice of local practitioners – and for this, we need to identify expert teachers and document their practices.

This book examines key questions that enable us to do just this: questions concerning the nature of expertise as an appropriate measure of quality in the classroom, questions investigating what we already seem to know about both teacher expertise and effective teaching in low-income countries, and methodological questions underpinning any attempt to research teacher expertise in the global South. It presents the findings of an example study conducted in India that offers a feasible, replicable and ethically appropriate means to document such practices, thereby not only answering Pryor et al.'s (2012) call for studies of good practice in contexts that are challenging but also providing a means for such studies to become more widespread. While the study in question involves only one subject (English) at one level (secondary) and in one national context (India) (three limitations to the scope of my own research that must be acknowledged) the findings are presented with a focus on general, rather than subject-specific, expertise and are systematically cross-referenced with evidence from prior research. Based on this combination of both primary and secondary evidence, a differentiated framework for understanding teacher expertise is proposed: one that is inclusive of all teachers in all contexts, not just the global North or South. The book also offers a wider framework for research and teacher development that enables teaching communities around the world to build their own feasible, appropriate and sustainable evidence base of context-specific teacher expertise.

1.1.1 Defining 'Global South'

There are two complex and contested terms used in the title of this book, both of which require clarification. Chapter 2 offers extensive discussion of 'teacher expertise' as a construct and justification for my choice of it as a measure of quality. The other key term 'global South' is discussed here.

The terms 'global South' and 'Southern' are primarily used in this book to refer to national educational contexts that, using World Bank data (2019a), fall into either low-income or lower-middle-income categories. This choice derives from the focus of this book on understanding teacher expertise in the most challenging educational contexts worldwide; contexts where attempts to support and scaffold educational change and 'improvement' are most frequently directed in international development initiatives. It is well established that the primary influences on the quality and challenges

of educational provision and uptake around the world are, at root, financial (Clemens, 2004; Huisman & Smits, 2009; Lee & Barro, 2001). This includes both direct investment into the education system itself[4] and income levels and financial precarity across the population attempting to access and benefit from education. Such issues of income and investment have real social and practical implications, not only in schools (e.g., class size, infrastructure, availability of resources) and teacher education but also for a child's school readiness, nutrition levels, access to education and family support during schooling (see Section 4.1). Importantly, it is these influences and the resulting conditions and challenges that constitute the key shared characteristics of educational contexts across the global South, much more so than, say, a post-colonial predicament.[5] With only occasional exceptions, prior research reviewed in this book separates countries according to this distinction. The original data presented in this book comes from India, a country classified in the bottom half of lower-middle-income countries when data was collected (World Bank, 2019a). It shares numerous financially influenced challenges with other low- and lower-middle-income countries (Anderson & Lightfoot, 2019; Wiseman & Kumar, 2021; see Section 4.1), and therefore is, in many ways, representative of these financially poor Southern states. At times, particularly in Chapter 4, I will also use the term 'developing countries' to refer to these same national contexts, particularly when reporting on studies that use this term.

In making this definitional choice, I do not wish to underplay the complex differences in educational experience within a given state (Southern or Northern), nor to argue that all Southern contexts experience the same challenges. As others have argued (e.g., Grech, 2015), in some senses there are many global Souths, not one. Further, I am very much aware that other authors, particularly in the social sciences, understand and use the term 'global South' very differently, as 'more than a metaphor for underdevelopment' (Dados & Connell, 2012, p. 13), seeking to use it to refer to disadvantaged or marginalised social groups around the world, including in countries in the global North (e.g., Grech, 2015; Pennycook & Makoni, 2020; Santos, 2016). On occasions when I reference these alternative understandings of the South, this will be made clear in the text below, including in Chapter 11, where I discuss Southern Theory.

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[4] For example, India's per child yearly expenditure is just 2% of OECD averages (see Section 4.1).

[5] Not all Southern countries are post-colonial, and many Northern ones are.

1.1.2 My Background as Author

The introductory vignette for this chapter introduces two important themes in this book. The first is the discourse on teaching quality that constitutes its primary focus – what is meant by 'quality', what it may look like in the global South and why it is a key priority in development in education today (e.g., UN Sustainable Development Goal 4: Quality education). The second is the background, bias and positioning of the observer or writer – whose vision of quality is being presented, where this vision comes from and the multiple dangers associated with ethnocentrism. As such, I feel a compelling need to introduce myself to the reader before progressing further.

Having started my career as an English language teacher in the 1990s, I was privileged by my English-native-speaker background to benefit from the opportunity to travel to and teach in a number of countries around the world; first in Europe (Ukraine, UK, Italy, Turkey), where my experience was mainly in the private English language teaching (ELT) sector, and then as a volunteer teacher educator in Africa (Eritrea, Rwanda, Kenya), where, despite not having the required training and only limited relevant experience, I was expected to be(come) an 'expert' in basic (K12) education, and was thrown into primary and secondary classrooms that could hardly have been more different to those I had taught in myself. As the vignette above reveals, I had arrived in Eritrea with biases; beliefs and values that I could not see beyond, particularly concerning learner-centred education and, in ELT, communicative language teaching (CLT). Four years of living and working in these countries provided opportunities for me not only to understand how conceptions of quality in education are inextricably linked to sociocultural values (Alexander, 2000; Bruner, 1996; Sternberg, 2007) but also to witness and then learn about alternative visions of teaching quality beyond those I had been enculturated into, thanks to the expertise of numerous teachers I had the privilege to work with (see Anderson, 2015b). This learning has since continued over many years working as an educational consultant, researcher and materials designer in numerous countries worldwide, the majority in the global South. This experience has provided me with well-contextualised[6] opportunities to look at issues of quality and culture from different perspectives, and to become reflexive concerning my own biases as a teacher educator (see Edge, 2012). Today I am very much aware of the origins and sociopolitical connotations of approaches in education typically referred to as 'progressive' or 'learner-centred', and

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[6] I learnt the national language in several of these countries.

their dangers as what Schweisfurth calls 'travelling policies' (2013b; also see Tabulawa, 2003). Yet I retain critical interests in them that the reader should be aware of (see e.g., Anderson, 2019a; Anderson & Kamaluddin, 2015); these interests are inextricably linked to a concern with wider issues of quality in the classroom – what constitutes 'good teaching' – that underpins my work as a teacher educator and my motivation for writing this book.

1.2   WHAT WE DON'T KNOW ABOUT TEACHER EXPERTISE

Over 100 empirical studies have been conducted investigating aspects of the cognition and practices of teachers identified as experts since the 1980s, when scholars such as Gaea Leinhardt (e.g., 1983) and David Berliner (e.g., 1986) began their work in this area. While research on experts in many other fields of social practice was well established at the time and relatively uncontroversial, this was not the case concerning 'expert teachers' (Berliner, 2004), and some resistance to this phrase still exists to this day, due to the association between the notion of expertise and that of exclusivity (something teachers frequently distrust; see Goodwyn, 2017), rather than seeing the expert as a manifestation of professional competence, as it is typically perceived in other fields (e.g., legal practice, healthcare and engineering; Goodwyn, 2017).

Since this early research, methodological frameworks have emerged for identifying and studying expert teachers. Generally speaking, for inclusion in an expertise study, a teacher typically needs to have a professional qualification and sufficient experience for expertise to develop (at least five years) as baseline prerequisites (Palmer et al., 2005). In addition to these, researchers seek to identify teachers who seem to stand out in some way as leading practitioners within a given community. The most common means for finding such teachers has tended to be nomination by school inspectors, teacher educators and school headteachers, although a wide range of other criteria have also been used, often in combination, to select teachers for expertise studies. These include the possession of advanced teaching qualifications (e.g., National Board Certification in the USA[7]) or teaching awards, evidence of additional roles as teacher educators and mentors for colleagues, and evidence of higher student achievement than comparable peers (see Palmer et al., 2005); these are reviewed in detail in Section 5.5.

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[7]   www.nbpts.org

Once identified, expert teacher studies have investigated aspects of their cognition, their beliefs, their pedagogic practices, their professionalism and their personalities, sometimes in combination, and with both specific and generic focuses on different aspects of expertise (Tsui, 2009). These studies have involved a wide range of approaches, including case study (Sorensen, 2014), ethnography (Traianou, 2006), lesson observations (Smith & Strahan, 2004), phenomenology (Patterson, 2014), laboratory studies (Crawford et al., 2005), the use of specific research tools, such as eye-tracking cameras (Wolff et al., 2016) and stimulated recall interviews (Leinhardt et al., 1984). Of particular interest in these studies has been the comparison of expert teachers with either novice teachers or so-called 'experienced non-experts' (e.g., Hattie, 2003; Tsui, 2003) to identify potentially important differences, either in their performance or development.

However, there is a strong bias in the contexts of these studies. The majority have been conducted in the USA, and the remainder tend to originate in Western Europe, Australasia and, more recently, East Asia, including several studies conducted in the more affluent provinces of eastern China (Anderson, 2021). As a result, we know almost nothing about expert teachers working in the more challenging contexts typical of the global South.[8] This has meant that the literature on teacher expertise and any reviews of it (see, e.g., Sternberg & Horvath, 1995; Stigler & Miller, 2018) describe teacher expertise with very little awareness of the typical contexts of many teachers around the world today, often assuming that teacher expertise is primarily a product of effective organisational contexts or wider teacher communities, and hypothesising as result that it is unable to develop or exist in more challenging contexts. For example, Stigler and Miller (2018), in their discussion of this issue, argue that 'an expert teacher in a dysfunctional school system' might be either an 'oxymoron' or 'a waste of human resources' (p. 434).

In view of these opinions, there is an urgent need not only to identify and document the practices of expert teachers working in the global South (simply to prove to some sceptics that they exist), but also to understand how teacher expertise may develop outside of formalised support networks. However, perhaps more importantly, teacher expertise studies in Southern classrooms are needed simply because they are capable of showing other educators working in comparable contexts potential ways to be effective, even when the conditions and constraints of practice are operating against them. In this sense, then, we have no models of appropriate effective practice for

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[8] Toraskar's study (2015) is an exception (see Section 3.9.1).

teachers working in the most difficult contexts to learn from today, something that could be seen to be a striking neglect of the international educational research community (Alexander, 2015; Muralidharan, 2017; Pryor et al., 2012).

Research that sheds detailed light on the pedagogic practices of expert teachers working in the global South is also of particular use because of the relative lack of focus on aspects of pedagogy in international research into education and development. Alexander (2015) has even called this neglect of pedagogy the 'missing ingredient' (p. 254) in comparative education research. In this regard, studies of Southern teacher expertise enable us to shed light into what many econometric and statistical researchers of education in developing countries characterise as the 'black box' of the classroom (e.g., Aslam & Rawal, 2015; World Bank, 2016). Indeed, Alexander (2015) notes that 'the striking feature' of the global monitoring reports (GMRs), for example, 'is that they do not so much engage with pedagogy as circle around it', leaving it 'securely locked in its black box' (p. 253).

Finally, while there are numerous studies identifying similarities among cohorts of expert teachers (e.g., Gross, 2014; Li & Zou, 2017; Marten, 2015), an area that has been comparatively neglected in expertise research is systematic comparison of the *differences* between expert teachers to understand exactly how experts do differ, along what parameters and why. The assumption has tended to be that it is the similarities that are most important, yet these can only be understood relative to the differences.

1.3 OVERVIEW OF THE BOOK

The original research data presented in this book derives from my UK ESRC-sponsored[9] PhD study, conducted between 2018 and 2021 (see Anderson, 2021), investigating teacher expertise within the field of English language teaching in Indian state-sponsored secondary education. Since defending the thesis, I have conducted further literature research (particularly for Chapters 3 and 4), performed additional analysis of the data collected (Chapters 7 and 8) and developed a number of theoretical frameworks that are here presented for the first time, particularly in Chapters 10 and 11. While the PhD thesis presented three detailed individual case descriptions and included more extensive subject-specific discussion, this book looks primarily at the

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[9] Economic and Social Research Council grant references ES/P000771/1 and ES/T502054/1.

wider (non-subject-specific features) of teacher expertise and includes only one individual case description (Chapter 6) to allow more space for discussion of wider literatures of relevance as well as more extensive discussion of, and theorisation from, the findings. Readers interested in reading other such case descriptions may access these directly in the thesis itself, available online (Anderson, 2021).

This introductory chapter concludes in Section 1.4 with discussion of paradigmatic concerns, particularly my rejection of the paradigm divide between positivism and constructivism and my interest in bringing together and critiquing all possible sources of evidence within a critical realist framework. This is justified through the need for high-quality qualitative research to be more widely recognised alongside large-scale quantitative research (e.g., econometric studies, meta-analyses and regression analyses) in influencing both future research agendas and evidence-based decision making in international development fora and local national contexts.

Chapter 2 discusses the construct of teacher expertise, initially considering the challenge of defining expertise and reviewing a large number of definitions of expertise in the research and theoretical literature. It identifies four types of conceptualisation, two of which are norm-referenced and two criterion-referenced, and argues that while there is a 'fuzzy core' at the centre of both everyday understandings and academic definitions of the term 'expertise', in many cases the term is often used ambiguously, and as a proxy for other measures of quality, such as effectiveness or experience. I argue that teacher expertise is a more appropriate measure of practitioner quality than either teacher effectiveness or experience, neither of which is sufficient to capture the breadth and complexity of the impact and influence of highly valued educators within their professional context. The chapter concludes by offering a working definition of teacher expertise that recognises it as both competence-based and community-referenced (i.e., situated), while allowing sufficient flexibility for local interpretations around its core features.

Chapter 3 introduces Sternberg and Horvath's (1995) expert teacher prototype – a key construct in this book – as a potentially appropriate means to bring together the findings of expertise research thus far, one that avoids a 'best practice' approach (rejected in this book due to its implicit connotation of universal relevance). After outlining the systematic, replicable approach to the extensive and original literature review conducted for this study, and identifying the Northern-centric bias in this literature, Chapter 3 presents an updated overview of the prototype itself, summarising the most frequently reported findings from teacher expertise studies concerning the knowledge

base, cognitive processes, beliefs, personal attributes, professionalism and pedagogic practices (i.e., teaching) of expert teachers.

In order to counter the Northern-centric bias in teacher expertise research of Chapter 3, Chapter 4 attempts to bring together findings from a wide range of evidence sources in the literature concerning effective teaching in low-income contexts around the world. Before it does this, it discusses the circumstances and challenges of teaching in the global South as appropriate contextualisation for reporting the subsequent findings; the use of the term 'effective teaching' in this chapter is also clarified. The review begins with two important general findings in this literature: that teacher quality is an important influence on learning outcomes in developing countries and that effective teaching is deeply contextual in its nature. It then summarises findings from this literature using similar categories to Chapter 3 (albeit slightly amended to reflect the different focus of studies involved): teacher knowledge and beliefs, teacher professionalism and pedagogic practices. Chapter 4 concludes with brief comparison of the findings of these two review chapters, followed by important critical reflections. I observe that a large proportion of the studies conducted in low-income contexts tend to involve exogenous interventions, and that those that do involve research on extant practices in Southern classrooms nearly always focus on identifying (perceived) problems and deficits in these practices. As such, they tell us very little about teacher expertise in the global South, as Pryor et al. (2012) also note.

The next five chapters report on the original research carried out for this book. Chapter 5 begins by identifying several important methodological challenges in studying teacher expertise in the global South, particularly those relating to how participants are identified, how their practice is studied and how data is interpreted – challenges of particular importance for a researcher like myself with a personal background in the global North. It identifies five design elements that I felt my study needed to include. It then presents the design solution adopted, discussing the seven phases of the study chronologically and how it was made participatory at a number of these stages – from the preparatory exploratory research conducted for the project, through initial theorisation of expertise, recruitment of participants, participatory planning of the project, data analysis and writing phases to the final outputs of the study, which included the participant teachers' own publication alongside the PhD thesis. Details on the eight participant teachers' profiles, indicators of expertise and contexts of practice are provided here, as are statistics on data collected and the research questions adopted as a result of the participatory planning process. Chapter 5 concludes by offering a much-needed

updated review (since Palmer et al., 2005) of participant selection criteria used in teacher expertise studies over the last forty years.

Chapter 6 offers a portrait of teacher expertise through an ethnographic account of Nurjahan Naik Khwaja (not a pseudonym), an expert teacher working in Maharashtra, India. It introduces her context and challenges, describes her personal background, discusses her key beliefs about teaching and learning and then offers detailed insights into her practices as a teacher. These include her interpersonal practices, her languaging practices, how she manages curriculum coverage and planning, and her classroom practices. I offer extensive description accompanied by numerous quotations from Nurjahan herself, extracts from her lessons and images. Insights into her knowledge base, reflective practice and professionalism then build upon this detailed portrait, leading into a closing discussion of the evidence presented in this chapter of Nurjahan's extensive and multifaceted expertise.

Chapter 7 draws upon Stake's construct of the 'quintain' (e.g., 2006) as an appropriate means to bring together findings in a comparative case study of this sort; Stake's quintain is here seen as analogous to Sternberg and Horvath's (1995) expert teacher 'prototype' as similar means to understand the fuzzy core of context-specific expertise. It goes on to provide a detailed account of the research findings with regard to all eight participant teachers in my project, focusing primarily on the similarities found across their beliefs, interpersonal practices, languaging practices, curriculum coverage and planning, classroom practice, knowledge, reflection and professionalism. Like Chapter 6, this chapter includes extensive quotations, lesson extracts and other data sources (images, quantitative data analysis, etc.) to ensure that the description, particularly of pedagogic practices, is sufficiently detailed to be informative for practical purposes. The chapter concludes with an attempt to contextualise the quintain, looking at how the practices of the eight teachers reveal how they overcame, addressed or mitigated challenges that are frequently reported from across the global South, thereby offering useful insights for those working in contexts where comparable challenges exist.

Chapter 8 offers a detailed analysis of the difference among the eight expert teachers in my study. It draws upon two intersecting continua (conception of subject and degree of control) that became evident during data analysis as a means to understand the differences involved and 'plot' the teachers and their varying practices on a pedagogic field of sorts. Similarities between these continua and some of Bernstein's constructs, particularly *classification* and *framing* (e.g., 2000) are also explored. The chapter describes how these two continua were able to account for many of the practices that varied,

particularly when contextual differences among the eight teachers were also taken into account. It concludes with a number of critical reflections on Bernstein's sociology of education, particularly how the highly complex distribution and movement of power and influence at multiple levels within Indian educational systems is not amenable to analysis through his notions of 'official' and 'pedagogic recontextualising fields'.

Chapter 9 presents discussion of the findings of my research relative to the prior research reviewed in Chapter 3, into (Northern) teacher expertise. Twelve areas of cognition, pedagogic practice, professionalism and personal attributes are each addressed systematically to identify both similarities and differences between the participant teachers in my study and those from prior expertise research. While the similarities are numerous and important – pointing towards potential core components of teacher expertise – the differences are also insightful, and frequently found to relate to teachers' contexts and challenges. The final part of this chapter addresses the extent to which the participant teachers' practices were consistent with conceptions of learner-centred education, concluding that the rich and complex profiles depicted cannot be reduced to this single (albeit multifaceted) construct, and noting that many of the effective practices documented in their classrooms are not typically associated with learner-centred practices.

Chapter 10 brings together the findings of previous chapters through a differentiated teacher expertise framework. The framework summarises core components of teacher expertise as identified in studies from diverse contexts around the world – not prerequisites or universal features, but elements of the 'family resemblances' of expert teachers. It also identifies variable factors (those that seem to vary depending on context, with indications of the variables involved) and includes potential additional components of Southern expertise, the latter offered contingently given the limited evidence available. The framework is presented only as an initial 'skeleton' that may be tested, contributed to, and amended if required – a working model for development through usage. The closing section of this chapter explores how the framework may be used in different areas of research, curriculum development, teacher education and international development.

Chapter 11 attempts to take a step back from the potential practical contributions of my research and this book to examine two broader questions of interest to social scientists and educational researchers, respectively. It begins by acknowledging the importance of ongoing discussions in social science regarding 'Southern theory' (e.g., Connell, 2007) – ways of thinking and understanding that do not originate in, or depend upon, Northern

epistemologies and conceptual frameworks. I argue that there is an urgent need for what might be called 'practical Southern theory' to assist teachers and other practitioners in areas of applied social science to solve the urgent problems of practice that communities, organisations and systems across the global South face on a daily basis. I provide examples of several theoretical constructs as potential examples, one established in the wider literature, one involving an under-theorised phenomenon and one emerging as important in my research. The second half of Chapter 11 offers one vision for how teacher expertise studies can contribute to a wider, sustainable framework for building context-specific expertise within educational communities around the world that does not depend on the input of exogenous practices and approaches from, for example, the global North. The framework brings together research and practitioner professional development through collaborative inquiry between varied members of educational communities.

Chapter 12 reflects briefly on the findings of my research and recaps on a number of the key arguments presented in this book – noting how teacher expertise is always adapted to context, highlighting the high ecological validity of expertise studies, emphasising the need for further appropriate research on Southern teacher expertise and arguing ultimately that without an understanding of expert teachers in diverse contexts worldwide, we cannot fully understand teacher expertise itself.

1.4 PARADIGMATIC CONCERNS

The pursuit of science seems to place the highest value on the generalizable, and the pursuit of professional work seems to value the particular most, but they both need both.

(Stake, 2006, p. 7)

Any work interested in investigating good practice in education needs to address questions of paradigmatic positioning carefully, particularly with regard to what is often called the paradigm divide (or even 'war'; Gage, 1989) between two traditions in the social sciences, which are often characterised as dichotomous and irreconcilable (e.g., Guba & Lincoln, 1994), a characterisation that I would like to avoid in this book. I prefer to discuss these traditions as 'tendencies' on a continuum between which individual pieces of research, and many of us, as researchers, are able to move between projects. I do so partly because of my own background with a foot in both traditions (a proud mixed methods 'pragmatist'; see Teddlie & Tashakkori, 2011) and partly because of my related personal belief in the importance of insights that

work in both traditions can provide – evident in the wide range of research and theory discussed below. After introducing and critiquing both tendencies, particularly in their most extreme forms, I outline my own paradigmatic position, linking this carefully to the aims, ambitions and sources drawn upon in this book.

The first tendency, typically associated with quantitative research and (post-)positivist epistemologies, is a *tendency towards generalisation* – to look across large bodies of data in order to identify commonalities that may be of use. In education, such commonalities, if found reliably, are potentially extremely useful, as they can advise educational policy and practice in a wide range of contexts. Perhaps the most obvious example of works that do this are systematic reviews such as meta-analyses (e.g., Hattie, 2009, 2012; Marzano, 1998) and metasyntheses or metasummaries (e.g., Anderson & Taner, 2023), all of which attempt to summarise the findings of multiple studies to identify what practices, interventions, factors or influences lead to more learning. Comparable attempts to 'essentialise' the findings of what are typically referred to as 'robust' research are frequently offered by powerful organisations supporting this tendency (e.g., the Institute of Education Sciences in the US and the Education Endowment Foundation in the UK) and promoted by them as 'evidence-based' practice. The biggest challenge, and most frequent cause of error within this tendency towards generalisation, is the need for both primary researchers and secondary analysts to make complex, often surprisingly subjective value judgements across different studies when deciding whether to lump them for the purpose of generating effect sizes or summaries. This is particularly true when decisions are made as to whether different studies constitute examples of the same thing (e.g., 'cooperative learning', 'formative assessment' and 'synthetic phonics', which all have multiple, varying manifestations), but also true with regard to implementation of an intervention, comparability of participants and how outcome measures are assessed and calculated in varied studies. In the complex realities of education, there is often a surprisingly large difference in how the constructs underpinning studies are operationalised, even in randomised controlled trials, which necessarily undermines the validity of any attempt to generalise across these studies. The second, perhaps more obvious risk, which applies more in the extrapolation beyond the studies (an issue of validity), is that of overgeneralisation – the assumption that something that has been found to be effective or useful, either in one study (no matter how large-scale), or through meta-analysis, is likely to be effective in all contexts. Very often, an aggregated positive (or negative) effect size conceals much

greater variation between individual studies, such that, without awareness of important contextual factors influencing outcomes, an intervention that is known to have generated a positive effect size in some studies may be implemented in a context where evidence indicates that it more often has a negative impact. See, for example, the case of English-medium instructional approaches in language-in-education research, which, despite positive results from higher-income contexts, are more likely to inhibit learning across the curriculum in lower-income contexts (see Mahapatra & Anderson, 2022; Simpson, 2019).

The second broad tendency, typically associated with qualitative research and more constructivist or interpretivist paradigmatic positions, is a *tendency towards particularisation*. Researchers working within this tendency typically employ small sample sizes and provide abundant, useful information about aspects of context, relationships and personal experiences – the so-called 'thick description' that enables us to understand the relationship between a phenomenon, practice or influence, and its context. Quite often, such researchers depict their participants as inhabiting 'multiple realities' and argue that extrapolation is simply not possible with regard to normative conclusions, more abstract theoretical generalisations or even (at times) carefully hedged recommendations for comparable contexts. Why, some might ask, is this a problem? Because here, too, there is a fundamental danger, one that is less often apparent to those within the somewhat insular echo chamber of academia to whom this tendency is almost entirely limited. Despite the fact that such research is potentially able to shine crucial light into what is frequently typified as the 'black box' of the classroom (see Alexander, 2015, discussed above), because it is unwilling, and, as a result of its research designs, largely unable to generalise beyond its own participants, research within this tendency is rarely able to interest those who make key decisions concerning educational policy and practice in the wider world. As a result, this important role is left primarily to researchers within the generalising tendency, who themselves are – paradoxically – largely ignorant of what happens in the mysterious black box that particularising researchers know so well – even when they believe they are 'delving into' it (e.g., Aslam & Kingdon, 2011). As such, I would argue that the most fundamental error of this second tendency is not simply a lack of generalisability but a lack of ambition among many (not all) such researchers for their research to take its rightful place beyond academia, alongside the generalising tendency, in informing wider practice in the field of education.

Historically, these two tendencies are often perceived to be divided by incommensurable paradigmatic differences (Gage, 1989; Guba & Lincoln, 1994)

Figure 1.1 The continuum between generalising and particularising tendencies
Note. 'n' = number (in sample).

THE GENERALISING TENDENCY   THE PARTICULARISING TENDENCY

large-n research   ←→   mid-n research   ←→   small-n research

greater explanatory power   greater understanding

hypothesis testing   hypothesis generating

associated with larger-scale, quantitative studies   associated with smaller scale, qualitative studies
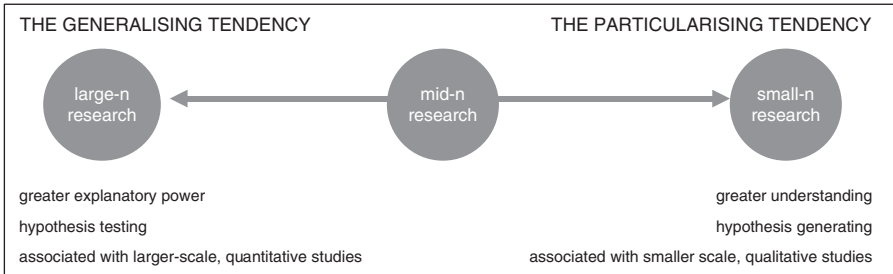
that have traditionally led to a lack of engagement between them, particularly in academia. In this book, both as a result of pragmatic concern (my intention to contribute useful guidance for education) and my own personal beliefs (consistent with those of Maxwell, 2012), I adopt a critical realist position that enables my research questions to dictate my methodology, recognising both the possibility that generalisable good practice in education may exist and be desirable, and the inevitable dangers that an uncritical, naïve realism brings with it. Consistent with this, in order to maintain contact with both the generalising and the particularising tendencies, rather than seeing these as dichotomous, I perceive a continuum along which qualities vary by degree (see Figure 1.1), also recognising the validity of research located in the 'no-man's land' between these positions. This perspective explains both my interest in medium-sized ('mid-n') samples that facilitate both contextualised understanding (what Gerring calls 'hypothesis generation'; 2007) and opportunities for tentative generalisation (Gerring's 'hypothesis testing') and my interest in drawing on all prior research findings and related theory, regardless of tendency, as potentially able to inform inquiry.

The continuum is of particular importance throughout this book because of two urgent needs resulting from the absence of prior research identified above: firstly, the need to understand more of how varied contexts in the global South differ from those in the North (i.e., the need to spend time *inside* the black box), and secondly to offer useful guidance for those who work in Southern contexts, which may come through identifying potentially generalisable facts, either about expert teachers in all contexts, or those working in the South. As such, I report the findings of my study below by moving mainly from right to left along the above continuum, beginning with a portrait of one Southern expert teacher in Chapter 6, then moving towards the 'mid-n'

position in Chapters 7 and 8 as I identify similarities and differences among eight participants in my study. In Chapter 9, I compare my findings to those of the systematic literature review conducted in Chapter 3 as transparently as possible in order to identify similarities and differences within this wider 'sample' of expert teachers. Then in Chapter 10, through the differentiated framework, I propose both tentative generalisations that seem to hold true across expert teachers in the majority of contexts involved and – equally importantly – variable factors, as areas where such generalisations are not possible – a need to retain the particular. This movement is hardly new or unique in research reporting but is conducted here in a way that is systematic, replicable and consistent with the above positioning.

2 The Construct of Teacher Expertise

And how will you enquire, Socrates, into that which you do not know? What will you put forth as the subject of enquiry? And if you find what you want, how will you ever know that this is the thing which you did not know?

—*Plato, Meno* (translated by Jowett, 1871)

A study purporting to be one of quality must introduce, define and justify the measure of quality it adopts. With regard to teaching, two constructs of quality are most often used in the research and theoretical literature – *expertise* and *effectiveness*; both are discussed in this chapter alongsidse a third, *experience*, sometimes mistakenly interpreted as a proxy for quality. My choice of expertise is then justified as the widest and most flexible of these constructs, most adaptable for use in under-researched contexts and most useful as a means to characterise teacher quality in general.

The definition given at the end of this chapter serves as a starting point, both for identifying the expert teachers in this study and for developing potential theories of teacher expertise appropriate to the global South. As such, it is fundamental to my account and discussion of expertise. It will also signify the potential value of my work to the reader, who will be able to compare this to their own opinion of quality in education. I hope to demonstrate in this chapter that both the everydayness and the flexibility of the term *expert* are its biggest assets, constituting a *fuzzy core* of quality that is useful and appropriate not only because of its general intuitiveness but because of its inevitability – expertise exists everywhere, regardless of the challenges of context.

2.1 THE PROBLEM OF DEFINING EXPERTISE

While the term 'expert' has had common usage in English and many European languages for centuries, our interest in 'expertise' as an object of research is a more recent phenomenon, beginning with studies of expert chess players in the 1960s (Ericsson, 2018; Glaser & Chi, 1988). Since then, researchers have attempted to identify and study the practice and cognition of experts in a wide range of domains including music, medicine and writing. In the 1980s, both Gaea Leinhardt and David Berliner, and their respective research teams, were among the first to apply the construct to the more complex social practice of teaching (e.g., Berliner, 1986; Leinhardt 1983), encountering a number of new challenges in the process. As Berliner notes, 'the link between expert teachers and their students' performance has not been as easy to establish as, say, the link between expert chess and bridge players and their performance' (2004, p. 200). Berliner argues that this is because knowing how to identify expert teachers remains a key challenge: before you can study expertise, you have to be confident you've found it. And this depends on how we construct our understanding of teacher expertise, for which a definition is essential.

In one sense, defining expertise is simple. A leading expert, K. Anders Ericsson, suffices with dictionary and Wikipedia definitions to identify three elements that tend to pervade most common-sense understandings of the construct: competence (i.e., specialist ability and/or knowledge), experience (as the source of the competence), and social recognition of an individual who possesses expertise (Ericsson, 2018, pp. 3–4). Expertise, in this sense, is an embodied, acquired competence. It cannot exist without a person, and that person cannot be a novice. However, the moment we attempt to build upon such generic, abstract definitions through expertise research, we encounter a chicken and egg problem. If we attempt to identify a list of domain-specific criteria (e.g., based on prior research on expert teachers) and then try to study 'experts' who meet these criteria, our findings will inevitably lead us back to, and reaffirm, the very criteria we identified in the first place, precluding the possibility of learning anything about expertise beyond our own personal theories. This is essentially the problem of Meno's Paradox (see the epigraph at the start of this chapter), and might be referred to as *Pygmalion sampling* in expertise research, in which researchers find – or even 'shape' (e.g., Tsui, 2003[1]) – research participants whose behaviour is consistent

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[1] Tsui's expert teacher, Marina, was also a student in her faculty, both before and during her study (see 5.2.1).

with their personal expectations concerning expertise in practice. As such, while Pygmalion sampling has occurred to varying degrees in a number of prior studies of teacher expertise (e.g., Sabers et al., 1991; Smith Feger, 2009; Westerman, 1991), it should be avoided in attempts to identify expertise for research purposes.[2] This is particularly true if we hypothesise that expertise may be (at least to some extent) a culturally variable phenomenon, characterised by previously undocumented features in under-researched educational contexts, including the global South. In other words, definitions of expertise for social science research should necessarily separate our understanding of the construct from attempts to understand the phenomenon in practice.

This leaves us with our 'simple' definition to explore, in which we identify abstract, domain-independent elements (e.g., 'competence', 'social recognition' and 'experience'), and leave the more specific features to reveal themselves as the findings of our research. The majority of attempts to define expertise explicitly in educational research have (wisely) chosen this domain-independent approach. However, as we investigate the plethora of uses of the construct in numerous works in the field of education, we find that it has been appropriated to serve a wide range of purposes and arguments (Bucci, 2003), although there are useful patterns among these that can help us understand where the core of the construct lies.

2.2 NORM-REFERENCED AND CRITERION-REFERENCED EXPERTISE

A review of definitions of 'expertise' in education reveals two tendencies: The first is a tendency to *norm referencing*, in which expertise is defined comparative to the norm (or average), either through impact (e.g., a teacher's impact on their learners' achievement) or through recognition in a community (e.g., through awards or leadership roles). The second is a tendency to *criterion/ criteria referencing*, in which expertise is defined through the presence of specific features, either as possessed attributes or practices, including some that risk Pygmalion sampling, as discussed above. Table 2.1 provides examples of definitions within these two broad tendencies.

While some discussions of teacher expertise fit neatly within the four conceptions proposed, others may range across several of these. An example of this is Tsui (2003), who introduces expertise through norm (community)

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[2] Arguable exceptions to this include studies investigating specific features of expertise that are not likely to be influenced by the criteria in question.

Table 2.1 Norm-referenced and criterion-referenced conceptions of (teacher) expertise

Referencing	Type	Example definition	Other authors
Norm-referenced	1. Product-referenced: expertise as outcome	'Experts were identified by their students' unusual academic successes…' (Leinhardt et al., 1987, p. 136)	Berliner, 1986; Elferink-Gemser et al., 2018; Hattie, 2003; Leinhardt & Greeno, 1986; Pepin et al., 2017; Posner, 1988
	2. Community-referenced: expertise as role	'…an expert is someone generally recognised within society as surpassing in a particular sphere.' (Johnson, 2005, p. 21)	Agnew et al., 1994; Borko & Livingston, 1989; Bucci, 2003; Campbell, 1991; Carter et al., 1987, 1988; Clarridge & Berliner, 1991; Collins & Evans, 2007; Rampton, 1990; Swanson et al., 1990; Traianou, 2007
Criterion-referenced	3. Competence-referenced: expertise as attribute (embodied expertise)	'Expertise is generally defined as "expert skill or knowledge: the skill, knowledge, or opinion possessed by an expert".' (Ericsson & Towne, 2010, p. 404)	Bruer, 1993; Ericsson, 2018; Gross, 2014; Johnson, 2010; Li & Zou, 2017; Milstein, 2015; Shulman, 1987; Valdés et al., 2014
	4. Process-referenced: expertise as process/ practice (enacted expertise)	'[Adaptive expertise] involves the development of flexible routines with continual adjustments between the needs of specific learners in real time while matching the needs of the communities of stakeholders over time.' (Riel & Rowell, 2017, p. 673)	Bereiter & Scardamalia, 1993; Berliner, 1988, 2001a, 2001b; Bond et al., 2000; Crawford, 2007; Crawford et al., 2005; Smith et al., n.d.; Tsui, 2003

referencing ('[experts'] performance is regarded as exemplary, to be emulated by fellow members in the profession', p. 1), then identifies her expert through norm (product) referencing ('her performance on the course was outstanding', p. 71), and later adopts a process-referenced definition ('I characterize expertise as constant engagement in exploration and experimentation, in problematizing the unproblematic, and responding to challenges', pp. 277–278) based on the findings of her study.

Thus, it can be seen that, while a number of elements, including those in Ericsson's common-sense definition (competence, experience and social recognition), can be seen to constitute core features of characterisations of expertise, like many other key concepts in social science, this is a somewhat *fuzzy core* (Ropo, 2004; also Sternberg & Horvath, 1995), and individual uses of the term may employ it in different ways at different points. As such, any meaningful discussion of expertise needs to recognise its fuzziness, its (at times seductive) appeal, and also be critically aware that different uses of the

term are often exploring rather different things in practice. Two good examples of this in educational research are the tendencies to perceive teacher expertise as synonymous with either teacher effectiveness (e.g., Hattie, 2003) or teacher experience (e.g., Bowers et al., 2020; Farrell, 2013; Rich, 1993). Both require discussion in order to understand why they must be rejected as proxies for expertise or, indeed, sufficient measures for assessing teacher quality in any context.

2.3 THE DANGERS OF TEACHER 'EFFECTIVENESS' AS A PROXY FOR QUALITY

An important but often overlooked consideration in discussions of teacher expertise is its relationship to the parallel construct of *teacher effectiveness*, which has also been extensively researched (see Campbell et al., 2004a, 2004b; Stronge, 2007), although not always carefully theorised (e.g., Polk, 2006). In contrast to expertise, the terms 'effective' and 'effectiveness' are somewhat easier to define, at least in the abstract. Consistent with the implication in the word 'effect' of an impact or influence on something else, definitions of effectiveness are usually outcome-oriented, analogous to product-referenced definitions of expertise: 'producing a decided, decisive, or desired effect (result or outcome), producing an intended effort' (McEwan, 2002, p. 7) – invariably understood as an impact on the learners themselves (Nordstrum, 2015).[3] However, as soon as we attempt to operationalise or clarify exactly what we mean by 'impact', 'outcome' or 'effect', we encounter a number of problems that reveal several weaknesses of 'effectiveness' as a sole indicator of quality in research on teaching.

Many teacher effectiveness studies attempt to define effectiveness through its assumed impact on the most easily accessible quantifiable measure of learning – student exam achievement, such as Stronge et al. (2011, p. 345): 'Effective teachers were defined as those with TAIs [teacher achievement indices] in the top quartile; less effective teachers were defined as those with TAIs in the bottom quartile', also found in some expertise studies (e.g., Leinhardt et al., 1987). However, there are two fundamental problems in using learner academic outcomes – particularly as measured in examinations – as the sole

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[3] Other terms often used to characterise teaching quality through impact on learners include 'successful teaching' (e.g., Krueger, 1997), 'great teaching' (e.g., Coe et al., 2014) and 'exemplary teaching' (e.g., Hativa et al., 2001); these are typically used interchangeably with 'effective', and considered analogous to it here.

means to define or conceptualise teacher quality, and these problems undermine the validity of all studies that attempt to do so, at any level (see Berliner, 2020).

The first is an empirical problem – attempting to separate the so-called 'value-added' impact of an individual teacher from the myriad other factors that influence the exam scores of each learner in that teacher's classes, a problem recognised by UNESCO:

> Test scores … are influenced by many more factors than teaching, including students' skills, expectations, motivation and behaviour; parental background and support; peer pressure and aspirations; school organization, resources and culture; and curriculum structure and content. Teachers' impact on student performance, furthermore, is cumulative; a student is influenced not only by current teachers but also by former ones. (UNESCO, 2017, p. 75)

Berliner (2020, p. 253) adds others, including language spoken at home, medical care and even environmental pollutants (all supported by evidence). Despite many attempts to measure the relatively small (7–10%; Darling-Hammond, 2012) value-added impact of any individual teacher on exam scores, a number of authoritative studies have concluded that it is not possible to do so reliably (Bond et al., 2000; Darling-Hammond, 2012; Kane & Cantrell, 2010). Darling-Hammond's (2012) review of research into value-added metrics used in the USA, where performance-related pay is common, documents several studies finding 'wild swings' in the apparent efficacy of individual teachers, observing that 'among top-ranked teachers (the highest 20%) in one year, only 25% to 35% were similarly ranked a year later, while a comparable proportion had moved to the bottom rankings' (p. 21). She even documents the example of a recent winner of a 'Teacher of the Year' award who was dismissed in a subsequent year for underperformance (p. 22), and notes, 'If value-added ratings were really measuring a teacher's basic competence or effectiveness, such wild swings would not occur' (p. 21).

Further, even if it were possible to measure a teacher's value-added impact accurately, it would still be a poor indicator of quality. As the leading assessment statistician, Harvey Goldstein (2004) observes exam performance is not a proxy for learner achievement: 'any rise in test scores should not be confused with a rise in learning achievement as opposed to test-taking performance' (p. 10; also see Barrett, 2009). And as others have noted, research that attempts to identify effective/expert teachers solely on exam results is likely to find 'efficient child-crammers rather than excellent pedagogues' (Kuchah, 2013, p. 85; also see Amrein-Beardsley, 2007; Campbell et al., 2003; Goe et al., 2008).

Despite these warnings, many schools and educational systems continue to evaluate teachers, at least in part, on such statistically specious, low-validity measures of quality, potentially damaging that which they aim to cultivate. A recent UNESCO Global Education Monitoring Report on accountability in education concludes unambiguously 'performance-based pay linked to student test scores should be avoided; there is little evidence of its impact on outcomes, and it does not increase motivation' (UNESCO, 2017, p. 77); the authors also go on to observe that it reduces equity.

This brings us to our second, more theoretical problem: the question of how we conceptualise the impact of an effective teacher, and why this must necessarily extend beyond exam performance to have ecological validity for society, something recognised by Brophy and Good in an early evaluation of process-product research:

> …it is a misnomer to refer to [teachers' effects on students] as 'teacher effectiveness'" research, because this equates 'effectiveness' with success in producing achievement gain. What constitutes 'teacher effectiveness' is a matter of definition, and most definitions include success in socializing students and promoting their affective and personal development in addition to success in fostering their mastery of formal curricula. (Brophy & Good, 1986, p. 328)

Today, one might add to these the importance of motivating learners, facilitating social and emotional learning, providing pastoral support and even supporting the development of colleagues and the well-being of the school community, all of which are lost if definitions of an effective teacher are too narrowly conceived (Bucci, 2003; Campbell et al., 2003; Goe et al., 2008; Muijs et al., 2005; UNESCO, 2017).

Based on their discussion of the diverse impacts of effective teachers, Campbell and colleagues argue for the construct of 'differentiated teacher effectiveness' (Campbell et al., 2003, 2004a), noting that 'teachers may be differentially effective in promoting the cognitive progress of different groups of students according to *background variables* [such as] ability, age (or developmental stage), sex, socio-economic status and ethnicity' (2004a, p. 7). This has been confirmed by research in the US (Darling-Hammond, 2012) and in the global South, where studies have found that teachers who come from their learners' village are more 'effective' (in the narrow sense) than ones who do not (Aslam & Rawal, 2015; Park & Hannum, 2001; Singh, 2013), and even that – in some contexts – female learners may learn more from female teachers (Aslam & Kingdon, 2011). Thus, one learner's effective teacher may not be another's – an important consideration for this book.

Any meaningful discussion of teacher quality necessarily requires us to move away from this obsession with valuing what can be measured (Campbell et al., 2003) to careful consideration of the full range of competencies, skills, attributes and experience that constitute teacher expertise (Alexander, 2008). As such, it is revealing that a number of leading authorities in the literature on teacher effectiveness (e.g., Bond et al., 2000; Campbell et al., 2003, 2004a, 2004b; Hattie, 2003; Stronge, 2007), in their more extensive and critical discussions of it, consistently invoke the features and domains of expertise, such as the knowledge base that underpins it, the diverse, acquired skills of expert teachers, the processes they facilitate, and the wider social web of collegiality and support that they frequently cultivate, without necessarily discussing the construct of expertise itself, although both Bond et al. (2000) and Hattie (2003) do. Campbell et al. (2004a, p. 107) conclude that 'effective teaching is not the pedagogical equivalent of painting by numbers, but is "the science of the art of teaching"' – another way of characterising the complexity of teacher expertise.

More recently, research into 'teacher professional competence' (see, e.g., Blömeke & Kaiser, 2017), carried out predominantly in mathematics education in Germany, has also attempted to adopt broader definitions of teacher impact. For example, researchers in the COACTIV project (see Kunter et al., 2013a) conceptualise professional competence as a multidimensional construct comprising 'the skills, knowledge, attitudes and motivational variables that form the basis for mastery of specific situations' (Kunter et al., 2013b, p. 807; also Yang et al., 2018). They recognise the need to define 'success based on multiple outcomes' (Kunter et al., 2013b, p. 816) and attempt to measure its impact through a range of evidence sources. While learner academic achievement remains central among these, impact on, for example, students' enjoyment of the subject (e.g., Kunter et al., 2013b) and student ratings of aspects of teaching have also been investigated alongside researcher evaluation of tasks used by participating teachers to assess learner cognitive activation (COACTIV) (Kunter & Voss, 2013). They have also investigated the importance of teacher beliefs (Voss et al., 2013), well-being (Klusmann et al., 2008) and enthusiasm (Kunter, 2013) to learner outcomes to develop an empirically based understanding of professional competence that further informs their model. Interestingly, the findings of the COACTIV project share much in common with the findings of Anderson and Taner's (2023) metasummary of teacher expertise research, and the expert teacher prototype presented in Chapter 3.

The above discussion indicates that effectiveness, including its proxies (e.g., 'successful teaching'), while potentially useful, is neither reliable nor

sufficient to capture what we value most in teachers. In contrast, expertise is able to incorporate product-referenced measures of quality, such as those underpinning effectiveness, yet it is also capable of going beyond them to include other potential aspects of quality or 'impact' – both those that teacher professional competence research indicates are important and those that may elude direct measurement. And while, in this sense, the full effects of expertise may ultimately be unknowable in an empirical sense, at least the construct itself in this wide, flexible, 'fuzzy' sense, enables us to cast our theoretical net as widely as possible in the search for teacher quality to ensure that we do not lose or neglect any of its potential exemplars, features or benefits.

2.4   TEACHER EXPERTISE AND EXPERIENCE

Given that 'novice' is often posed as the opposite of 'expert', there should be a positive relationship between experience and expertise – and there is. Early research into skill acquisition expertise by the Dreyfus brothers demonstrated this (Dreyfus & Dreyfus, 1986), although even they noted that 'not all people achieve an expert level in their skills' (p. 21). An often-recounted aphorism in teaching hints towards the likely reason for this:

> It has been said that teachers who have been teaching for twenty years may be divided into two categories: those with twenty years' experience and those with one year's experience repeated twenty times. (Ur, 1996, p. 317)

This observation is today supported by longitudinal and cross-sectional research into teacher professional development and performance: while experience in the early stages of our careers typically leads to improvements in quality (however measured), it does not necessarily or inevitably lead to expertise (e.g., Day et al., 2006, 2007; Goodwyn, 2011; Hattie, 2003). Discussing the key findings of one of the largest studies conducted into longitudinal professional learning of teachers (the VITAE project), Day and Gu (2007, p. 423) observe that 'teachers do not necessarily learn through experience; that expertise is not acquired in an even, incremental way; and that teachers are at greater risk of being less effective in later phases of their professional lives'.

Put simply, the reason for this variability is that someone who has achieved a state of expertise has succeeded in learning more from their experience than comparable non-experts (Ericsson & Smith, 1991), but exactly how they do this is open to conjecture. Based on their research into expert writers, Bereiter

and Scardamalia (1993) offer a convincing explanatory theory, 'expertise as process'. They note that, in contrast to experienced non-experts, experts never stop challenging themselves, engaging in systematic problematisation, 'reinvestment' of mental resources and 'progressive problem solving' (p. 82). Their theory is consistent with Schön's earlier concept of 'problem setting' (1983); how some practitioners 'find the right problem' as a 'conscious principle of action' (p. 18), enabling them to learn during their professional practice through his better-known construct of reflection-in-action. While these theories remain just that – theories, they have received some support through small-scale studies (e.g., Anderson, 2019b; Tsui, 2003), and may be further evidenced through meta-analyses of larger datasets.

In conclusion, while specific theories of learning may be contested, there is consensus in the expertise research literature that experience is a necessary but not sufficient prerequisite for expertise (Ericsson & Smith, 1991; Palmer et al., 2005), and educational sources generally agree on at least five years (e.g., Palmer et al., 2005) or, more often, seven years (e.g., Berliner, 1994, 2004; Tochon & Munby, 1993) of full-time teaching experience for expertise to develop in those cases where it does. This makes experience a useful *sine qua non* of expertise – easy to measure, but not enough in itself, and certainly not a proxy for expertise.

2.5   TOWARDS A WORKING DEFINITION OF TEACHER EXPERTISE

The above discussion of three widely used terms to indicate quality in teaching indicates that while experience is a necessary prerequisite for expertise, it is not sufficient, and while effectiveness can contribute to our understanding of expertise, it is too limited in its scope, and may also, occasionally, occur without experience or expertise (e.g., beginner's luck). This relationship is sketched loosely in Figure 2.1, where the porous boundaries indicate a necessary degree of fuzziness; there are obviously no hard and fast borders between them. Of the three, only expertise can appropriately characterise embodied quality at the practitioner level in teaching, and while it is sometimes abused by misuse and misappropriation, its familiarity and intuitiveness are also useful from a sociocultural perspective – expertise is precisely that which we value in educators. Key elements that inhere in its everyday use also appear in academic definitions, meaning that most are recognisable, albeit with variation according to the specific aims or personal biases of the writer.

Figure 2.1 The 'fuzzy' relationship between teacher experience, teacher expertise and teacher effectiveness
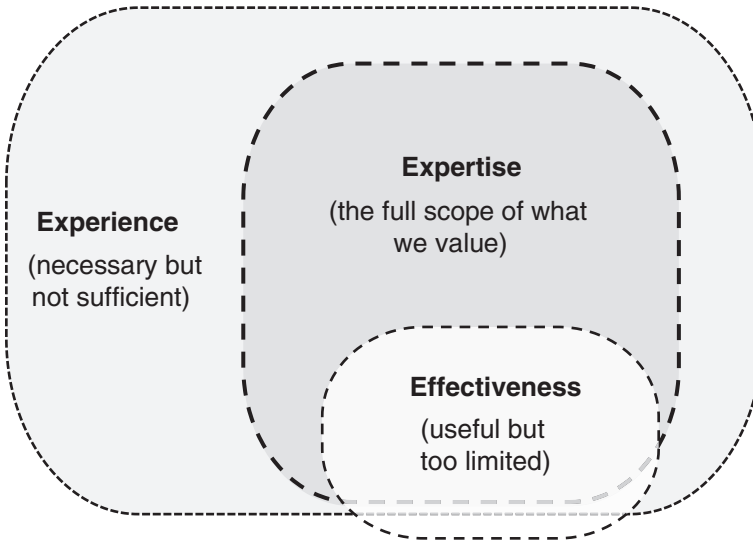
While this intuitiveness may suffice for general discussion of expertise, in order to study it, we must attempt to identify instances of it, for which a working definition is required and attempted here. Bucci (2003) encourages researchers investigating expertise to ask themselves: 'What makes a teacher an expert for the purpose of this research?' (p. 82). In my research, I aim to understand teaching and education as situated, sociocultural phenomena, what Bruner called 'major embodiment[s] of a culture's way of life, not just a preparation for it' (1996, p. 13). As much as possible, I also aim to avoid imposing external (Northern) preconceptions onto the expertise I search for, and wish to document examples of expertise as recognised locally (i.e., expertise-as-role). Thus, it is appropriate for me to search out community-referenced instances of teacher expertise. In line with this and drawing in part on Rampton (1990) and Bucci (2003), who both argue for situated definitions, I define teacher expertise as follows:

> Teacher expertise is an enacted amalgam of learnt, context-specific competencies (i.e., embodied knowledge, skills and awareness) that is valued within an educational community as a source of appropriate practice for others to learn from.

As such, I avoid the implication that it is necessarily 'best practice' (but it could be), nor product referenced (but it could be), and choose to position it

as both competence and practice – teachers both have it and do it. While it is norm-referenced (insomuch as it is contrasted with inappropriate practice in the community), I also avoid implying that it is necessarily exclusive (to a minority).

This definition is adopted cognisant of the need to provide space for community-specific qualities of teacher expertise to emerge as the features of its embodiment become apparent, appropriate to the exploratory approach involved here, as is prudent for under-researched (e.g., Southern) contexts. However, my aim in this book, as in the study that forms its core, is not simply to identify and document instances of teacher expertise in the global South, but to understand their relationships both to each other and to other exemplars of expertise around the world. Questions such as 'To what extent does it differ?' and 'By how much does it vary according to context?' are central to my enquiry, and to the potential practical utility of this book. When I set out to conduct this study, I hypothesised contingently that there may be some broadly universal aspects of interest, as well as some aspects that are specific to the global South, others that are unique to educational systems and local cultures, and others still that are even more specific to school communities, to a teacher's individual practice or even to the relationship between a teacher and a single learner in their class.

This definition will inform the sampling approach used for this study (see Chapter 5), and also influences the findings reported in Chapters 6–9. Before this, the next two chapters will seek to answer three important preparatory questions: What do we know from prior (Northern) research about expert teachers/teaching?, What exactly do we know about effective teaching in contexts that are challenging? and To what extent can we interpret these latter findings as evidence of teacher expertise, rather than either the frequently unsustainable product of exogenous interventions, or inappropriately narrow constructs of 'effectiveness'?

3   The Expert Teacher Prototype

… we propose that teaching expertise be viewed as a category that is structured by the similarity of expert teachers to one another rather than by a set of necessary and sufficient features …. a prototype view provides a way of thinking about expertise that incorporates standards (such that not every experienced practitioner is an expert) but also allows for variability in the profiles of individual experts.

<div align="right">(Sternberg & Horvath, 1995, p. 9)</div>

In Chapter 1, I discussed the continuum between the generalising tendency of larger-scale quantitative research and the particularising tendency of smaller scale qualitative studies, rejecting the so-called paradigm dichotomy that has characterised social studies research since the 1980s, and positioning my own research as moving flexibly between these two tendencies; a have-my-cake-and-eat-it interest in the whole picture, underpinned by my desire as a critical realist – and my practical need as a teacher educator – to understand both the contextualised individual cases and the generalisable truths.

In Chapter 2, sensitive to the needs of international research, I offered a community-referenced working definition of teacher expertise to facilitate the identification of potential examples of it without the need to consider its specific manifestations, which may be more context-specific. Yet it is, of course, these manifestations that expertise research is most interested in, as potential exemplars of use to society. And while available research is heavily biased towards certain (Northern) contexts, a detailed analysis of this research is an essential prerequisite of any study that seeks to understand teacher expertise.

This chapter offers a systematic but critical literature review of prior expertise studies, looking primarily at the generalisable truths concerning expert teachers, but also seeking to notice where there seems to be less detail in these

truths and more variation in findings, which point towards areas where context may play a greater role in teacher expertise. It does so through a key construct that this book draws frequently upon – the expert teacher prototype.

3.1 A FLEXIBLE FRAMEWORK FOR TEACHER EXPERTISE

In their discussion of the expert teacher prototype, Sternberg and Horvath (1995) argue that, like a number of other complex constructs in psychological research, there is a fuzziness to the notion of expertise in practice, consistent with the fuzzy core invoked in my definition of teacher expertise in Chapter 2. Rather than seeing it as a checklist of necessary and/or sufficient features, they envisage teacher expertise as a prototype of commonly shared features among experts, 'bound together by the family resemblance that experts bear to one another' (p. 16). Just as family members differ in unpredictable ways, so do experts, yet each will bear a number of similarities to the prototype, so much so that 'two equally valid members of the category may resemble each other much less than they individually resemble the prototype' (p. 14).

Despite the facts that Sternberg and Horvath's focus was primarily on education in the USA and that the prototype they discuss involves primarily aspects of cognition, the adaptability of their prototype model means it can be extended to teachers in any context – including the global South – and focus on any aspect of expertise, not just cognition. Importantly, the idea of a prototype, when compared to a more normative model (e.g., of 'best practice'), is that it allows for diversity and individuality – key features that teachers and teacher educators typically value because they resist the attempt to 'pigeonhole' expertise. Although teacher expertise research was in its relative infancy when Sternberg and Horvath wrote their paper, today we have a much wider base of expertise research from around the world on which to build a more detailed, more useful prototype, both in terms of which features of expertise seem to be most regularly reported, and whether, if at all, there are any contradictory features, or areas where detailed description proves elusive – if so, these are likely to be areas of primary interest with regard to the need for context-specific understandings of appropriate practice to emerge.

3.2 THE PROTOTYPE THUS FAR

Well over a hundred teacher expertise studies have been conducted since the 1980s, all of which are potentially able to help flesh out the expert teacher

prototype that was only beginning to emerge when Sternberg and Horvath conducted their early research. Consistent with my interest in casting the net as widely as possible when attempting to build an appropriate construct of teacher quality that is adaptable to diverse contexts and challenges, the review presented below comprises findings from over one hundred studies from any contexts in which a practitioner (or practitioners in multi-participant studies) was characterised as an expert teacher.[1]

A systematic search using several databases (ERIC, Web of Science, Proquest, Google Scholar) yielded over 500 peer-reviewed papers, books and PhD studies of potential significance. While a large number of these did not actually report on original empirical data on expert teachers (many used the term 'teacher expertise' to refer to professional development more broadly, and some made use of it more rhetorically to promote their own normative vision of good practice in education), those that did were assessed initially to evaluate the extent to which the researchers made a reasonable attempt to identify teachers who could be characterised as experts. A paper by Palmer et al. (2005), reviewing criteria for selecting participants for teacher expertise studies, was useful in this evaluation. Like others (e.g., Bereiter & Scardamalia, 1993; Tsui, 2005) and consistent with my earlier discussion above, Palmer et al. argue that experience alone is not sufficient to mark a teacher as an expert, although it should be included as a necessary prerequisite, with five years of full-time teaching typically considered the minimum appropriate period required. Additional criteria presented by Palmer et al. and accepted here (my aim was to be as inclusive as reasonably possible) are presented in Table 3.1. Studies from primary, secondary and tertiary education are included in the review below, as are both subject-specific (e.g., mathematics, physical education) and generalist studies (e.g., in primary education), and while a total of seventeen national contexts are represented, the majority of studies were conducted in North America. Importantly, while there is an increasing number of teacher expertise studies conducted in East Asia, particularly China, these almost all originate in higher-income contexts (e.g., provinces or cities in eastern China), and thus do not qualify as studies from the global South as per my definition in Chapter 1.[2] Only one such study did (Toraskar, 2015). This finding constitutes an important reason for conducting my own research.

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[1] Either in the title or abstract of the paper, and including both 'expert teacher' and 'teacher expertise'.

[2] China, itself, is today an upper-middle income country.

Table 3.1 Expert teacher criteria from Palmer et al. (2005)

Criterion (# studies)	Description	Notes
Teaching experience (16 studies)	Most studies required at least 5 years' experience. Prerequisite only.	Authors note that experience is 'necessary' but 'not sufficient' for the selection of expert teachers (p. 21).
Social recognition (17 studies)	Includes nomination from relevant stakeholders: headteachers, other teachers, students, parents, local education authority, inspectorate and teacher educators familiar with context.	16 of 17 studies also used other criteria. 6 of 17 used multiple stakeholder nomination.
Professional/social group membership (13 studies)	Included teacher certification, holding an advanced degree, participation on teacher education course, status as a mentor teacher or teacher educator as well as membership in an educational organisation.	Many of the studies involved 'cooperating teacher(s)', who had been studied by researchers before. Never used in isolation.
Performance criterion (16 studies)	Including through learner exam performance, teacher rating (e.g., by inspectorate or headteacher), comparison with colleagues, as well as descriptions of qualities (i.e., competence referenced), receipt of awards, senior responsibilities, conference and other public presentations, and teacher self-evaluation. Also included researcher screening and observation of lessons.	A rather large category, including a wide range of criteria, many of which are not obviously performance related. Often a combination of several performance criteria were involved. Those that were competence-referenced often involved high inference criteria.

Given the rather varied understandings of expertise discussed in Chapter 2, the varied participant sampling criteria documented in Table 3.1, as well as the diversity of levels, subject foci and contexts around the world represented in the expertise literature, below I focus only on findings that are more robust, being shared between at least four separate studies, across at least two separate subjects and either from different educational systems or at different levels (e.g., primary and secondary); this helps to mitigate against occasional dangers such as erroneous participant selection or researcher bias impacting on this review, consistent with the 'metasummary' approach for aggregating findings from different sources recommended by Sandelowski and Barroso (2007). Where I refer to 'strong evidence', six or more studies supported a finding; 'some evidence' indicates that three or four supporting studies were found. For reasons of space, only one to two example citations are provided. The findings are organised into the following categories, which emerged during the review to reflect the varying foci of the studies:

1. Knowledge base

2. Cognitive processes

3. Beliefs

4. Personal attributes

5. Professionalism

6. Pedagogic practice

3.3 THE KNOWLEDGE BASE OF EXPERT TEACHERS

There is strong evidence that expert teachers (ETs) have an extensive knowledge base that is well organised, integrated and readily accessible during practice (Bond et al., 2000). Most frequently reported is their extensive knowledge about their learners (Hanusova et al., 2013), but knowledge about their subject (Smith & Strahan, 2004) and the curriculum (Lawrie et al., 2019) are also well represented. There is also evidence of extensive pedagogical knowledge (Swanson et al., 1990) and well-developed self-regulatory knowledge (Bullough & Baughman, 1995), as well as partial evidence of knowledge about their teaching context (Berliner, 1988). A number of authors have proposed specific constructs to describe this integrated knowledge base, particularly Shulman's (1987) pedagogical content knowledge (PCK), a 'special amalgam of content and pedagogy' argued to be essential to effective teaching (p. 8) and strongly supported in ET studies (e.g., Gudmundsdottir, 1991; Yang, 2014). However, the question of whether the knowledge base described here is unique to ETs or merely a prerequisite for expertise is debatable (see Hattie, 2003). Both Gatbonton's (1999) and Housner and Griffey's (1985) studies, for example, involved 'experienced teachers' who demonstrate much of the expertise that Hattie (2003) argues is specific to experts. Importantly, a number of authorities in the field find that an ET's knowledge is context-specific (Berliner, 1988; Bond et al., 2000) and that they experience significant difficulty when trying to operate outside of their normal context of practice (see, e.g., Bullough & Baughman, 1995).

3.4 THE COGNITIVE PROCESSES OF EXPERT TEACHERS

There is strong evidence that expert teachers have an extensive range of automated cognitive processes and heuristics, employed both when teaching (Allen & Casbergue, 1997) and when planning (Borko & Livingston, 1989). It is speculated in the wider expertise literature that this automation frees up mental resources for less predictable occurrences (e.g., Feltovich et al., 1997).

This is consistent with strong evidence that ETs have high awareness of what is happening in class (Wolff et al., 2015) and are able to attend primarily to relevant information during instruction (Carter et al., 1988), frequently predicting potential problems before they arise. As a result, they are able to deal effectively with the unexpected (Borko & Livingston, 1989) and make appropriate decisions to keep learners on task and avoid disruption of the lesson (Westerman, 1991). Partial evidence of well-developed metacognition among ETs (Yuan & Zhang, 2020) and their greater willingness to make value judgements when compared to less-experienced teachers in laboratory studies (Sabers et al., 1991) are also of note. There is also strong evidence that ETs are able to solve novel problems effectively, engaging in what Bereiter and Scardamalia (1993, p. 81) call 'progressive problem solving' to do so, documented well in Tsui's study of an ET who regularly learnt by 'problematizing the unproblematic' (2003, p. 267), also consistent with what Schön called 'problem setting', a key component of reflection-in-action (1983). This is also broadly consistent with Hatano and Inagaki's (1986) concept of 'adaptive expertise', which, in contrast to 'routine expertise', is argued by them to be key to working in complex, unstable environments and has also received support from empirical studies of ETs (e.g., Crawford, 2007; Hayden et al., 2013).

3.5 BELIEFS OF EXPERT TEACHERS

While there is clear evidence that beliefs among teachers in general vary greatly between cultures (e.g., OECD, 2009; Stigler & Miller, 2018), it is notable that this appears to be much less the case with regard to ETs, at least based on the available literature. In the only ET study found that was conducted cross-culturally, Rollett (2001) notes that beliefs in three groups of ETs from Austria, the UK and the US were 'surprisingly similar', adding 'we had expected to find greater, more substantive differences in how teachers in the three different cultures viewed their teaching…' (p. 30). They report only one obvious such difference – a stronger emphasis on self-esteem among the US teachers in their sample. Consistent with Rollett's observations, this review found a large number of strongly held shared beliefs among ETs from studies conducted in different countries. These include strong evidence that ETs have a sense of moral duty (Hanusova et al., 2013; Yang, 2014), even 'mission', driving them (Campbell, 1991, p. 37), and evidence of a related belief in facilitating growth 'of young people as whole human beings' (Campbell, 1991, p. 37; Milstein, 2015).

A large number of studies provide strong evidence of a belief among ETs in the importance of building good relationships with one's learners (Schempp et al., 2002; Sorensen, 2014), with authors occasionally employing parental metaphors to describe such relationships (e.g., 'mothering'; Bullough and Baughman, 1993, p. 91); this is often linked to a frequently reported belief in the importance of knowing one's learners well (Smith & Strahan, 2004; Tsui, 2003).

In the area of motivation and expectations, there is consistent, cross-cultural evidence that ETs see it as important to motivate (Li et al., 2011; Traianou, 2006) and/or engage learners (Asaba, 2018; Milstein, 2015) in the learning process. While many also believe in the importance of setting 'high challenges' (Hattie, 2003) or 'high expectations' (Sorensen, 2014) for their learners, they resist blaming their learners for shortcomings (Goodwyn, 2011; Smith & Strahan, 2004), and frequently accept ultimate responsibility for success and failure in the classroom (Gross, 2014; Schempp et al., 1998), although many also believe learners need to take responsibility for their own studies and behaviour (Gross, 2014).

Evidence for the observation that ETs exhibit respect for their learners comes more from Anglophone countries (Bond et al., 2000; Sorensen, 2014). However, partly related to this, and more internationally supported, is the belief that ETs avoid making *a priori* assumptions about their learners (Carter et al., 1987), including what one ET called the 'labelling effect' caused by streaming practices in some educational systems (Tsui, 2003, p. 91); instead, ETs frequently believe in treating learners as individuals with diverse needs and backgrounds (Blackwell, 2020; Rollett, 2001).

With regard to beliefs about teaching, there is strong evidence among ETs of beliefs in aspects of constructivism (Chen & Rovegno, 2000; Lawrie et al., 2019), particularly a belief in linking learning to learners' lives, experiences and prior schemata (Gudmundsdottir, 1991; Yang, 2014), and some evidence that they believe in developing learners' study skills/autonomy (Li & Zou, 2017). However, other shared beliefs among ETs concerning pedagogy were more difficult to find, consistent with the greater differences in classroom practice discussed in Section 3.8.

3.6 PERSONAL ATTRIBUTES OF EXPERT TEACHERS

While early 'presage–product' studies uncovered relatively little of use concerning the relationship between teachers' personalities and their effectiveness (Campbell et al., 2004a), research on ETs indicates the regular presence

of certain attributes and qualities among them. Firstly, there is strong evidence that ETs are passionate about their work in general (Bond et al., 2000), some evidence that they have a passion for the subject they teach (Goodwyn, 2011) and strong evidence that they enjoy the act of teaching (Rollett, 2001). Numerous studies indicate that ETs care, often deeply, for their learners (Agne, 1992; Gross, 2014; Yuan & Zhang, 2020), suggesting that many may possess what Rogers calls unconditional positive regard, 'the kind of attitude that is most likely to lead to trust' (Rogers & Sanford, 1984, p. 1379), and may be the source of the tendency among ETs (documented above) to avoid blaming their learners for their shortcomings.

With regard to aspects of personality, there is strong evidence both that many ETs have a clear motivation to succeed (i.e., ambition; Milstein, 2015; Tsui, 2003) and that many are fairly independent or autonomous in their behaviour (Carter et al., 1987), although they do collaborate (see Section 3.7). Some ETs have been documented to be unusually emotional (possibly pride-related; Berliner, 1988; Tsui, 2003), and others to possess resilience, particularly in more challenging circumstances (Campbell, 1991). There is also strong evidence that many have a positive sense of self, including self-image (Rollett, 2001), self-confidence (Smith & Strahan, 2004) and self-efficacy (Hanusova et al., 2014, p. 869), an insight, perhaps, into the source of the autonomy, ambition and resilience that many seem to possess.

3.7 PROFESSIONALISM OF EXPERT TEACHERS

Closely linked to several personal attributes of ETs (particularly their ambition and caring personalities), there is strong evidence in the literature that they are also often highly dedicated practitioners, willing to work hard when required (Bullough & Baughman, 1995). Many have a strong desire to continue learning throughout their careers (Schempp et al., 1998), for example, through continuing professional development (CPD) activities (Hanusova et al., 2014) and in-service qualifications (Tsui, 2003).

There is very strong evidence that ETs value professional communities of practice, and collaborate regularly (Gross, 2014; Patterson, 2014); many share resources with colleagues (Pepin et al. 2017), also helping them as leaders (Smith & Strahan, 2004), mentors, or – on a more informal level – as peers. As Traianou's (2006) ET observes: 'I feel able to support colleagues with any difficulties. Other teachers have told me that I have helped them to understand things' (p. 66).

Finally, there is strong evidence that ETs challenge themselves regularly by innovating, experimenting and taking risks (Milstein, 2015; Tsui, 2003). Many are also documented to reflect extensively on their practice (Campbell, 1991; Lawrie et al., 2019), often critically (Hanusova et al., 2013). Tsui (2003) links these different areas of professional practice together, noting that her ET, 'was continuously working at the edge of her competence … constantly reflecting on her teaching, making further improvements by seeking professional input and trying out ways to improve her own classroom practices' (p. 103).

3.8   PEDAGOGIC PRACTICES OF EXPERT TEACHERS

Thus far, the research evidence points towards a number of regularly repeated, concrete findings with which to flesh out aspects of the expert teacher prototype. However, when we look more specifically at pedagogic practices (within which I include both planning and classroom teaching), the most important observation to make is that there seems to be much more variation, even within a specific educational system or subject focus. This is particularly noticeable in comparative case studies, involving directly comparable teachers (e.g., Milstein, 2015; Pepin et al., 2017; Sorensen, 2014); as a result, there is somewhat less detail offered below in this area, and greater critical caution in my discussion of these findings, particularly concerning specific approaches or methods.

3.8.1   Lesson Planning and Preparation

A good example of this variation is found in the area of lesson planning and preparation, where there is strong evidence of two seemingly contradictory findings: firstly, that ETs plan carefully (Bucci, 1999; Leinhardt, 1989), and secondly, that they plan 'fluently and efficiently' (Li & Zou, 2017, p. 240), often without making any written plans at all (Borko & Livingston, 1989; Westerman, 1991). While these apparently contradictory findings can to some extent be reconciled by separating careful planning from writing – as Scrivener (2005, p. 109) argues, 'planning is a thinking skill' rather than a document preparation task – there is also evidence that some ETs do indeed write detailed plans (e.g., Moallem, 1994; Tsui, 2003).

Nonetheless, there are other aspects of planning where greater consistency is detectable. There is strong evidence that many ETs consider both their learners' needs (Lawrie et al., 2019) and their long-term objectives (Pike, 2014) when planning, yet these plans remain flexible and contingent, allowing for final decisions to be made while teaching (Tochon & Munby, 1993) – this

tension between structure (e.g., through detailed planning) and freedom (e.g., through responsive teaching) is evident across the literature on ETs' pedagogic practice. Concerning ETs' preparation and use of teaching and learning materials (TLMs), there is evidence that ETs often develop these themselves (Lin & Li, 2011; Pepin et al., 2017), including 'a knack for finding resources' (Bullough & Baughman, 1995, p.472; also Tsui, 2003). A smaller number of ET studies also report the effective integration of information and communications technology (ICT) tools into their pedagogic practice (e.g., Pike, 2014), although this is not a dominant finding in the ET literature and difference between generations is, unsurprisingly, detectable here (e.g., Pepin et al., 2017). Further, there is some evidence that ETs make only limited use of core curriculum materials (e.g., textbooks) in the classroom (Borko & Livingston, 1989; Chen & Ding, 2018), often adapting these in ways consistent with their frequently documented creativity (Hatch, 2015; Lin & Li, 2011).

3.8.2 Classroom Practices – Freedom and Structure

Moving onto classroom practice, a number of interesting salient observations are apparent within the diversity of approaches described. Perhaps most evident of all is the very strong agreement (at least twenty separate studies) that ETs exhibit considerable flexibility in class, able to improvise while teaching (Bond et al., 2000; Even & Gottlib, 2011) and respond to learning as it happens, indicating that both Yinger's (1987) construct of 'improvisational performance' and Anderson's (2019b) of 'micro-improvisation' may both be important components of ET practice (Asaba, 2018). However, the fact that they are able to do this without abandoning their pre-planned intentions for the lesson is notable (Westerman, 1991) and offers evidence of the complex and curious structure–freedom tension that seems to be key to much teacher expertise. As Borko and Livingston (1989) note, ETs are 'very skillful at keeping the lesson on track and accomplishing their objectives while also allowing students' questions and comments to be spring-boards for discussions' (p. 481).

With regard to lesson structure, there is strong evidence that expert teachers have clear routines and procedures (Leinhardt & Greeno, 1986), often established at the start of the year (Leinhardt et al., 1987), although this is more evident in studies conducted at primary levels than secondary. Several studies report teachers who regularly conclude lessons with a summary activity (e.g., Lin & Li, 2011), and there is some evidence for ETs providing signposting throughout the lesson (Westerman, 1991) and cohesion between activities (Even et al., 1993).

3.8.3 Interpersonal Practices and the Classroom Community

There are comparatively few shared findings with regard to behaviour management, although, as noted above, due to their cognitive architecture, ETs are often described as being able to 'anticipate and prevent disturbances from occurring' (Hattie, 2003, p. 7; also see Wubbels et al., 2006); it could be argued that the relative lack of discussion of behaviour management strategies in the ET literature (i.e., how they deal with misbehaviour) supports Hattie's assertion – in the classroom (as in healthcare) it seems to be the case that prevention is preferable to treatment. While this is rarely linked causally to engagement levels, it is notable, that, consistent with ETs' frequently documented belief in this area (see above), there is strong evidence that they are able to engage learners effectively in class (Bond et al., 2000; Milstein, 2015), particularly through enjoyable, intrinsically motivating practices (Arani, 2017) and the use of humour (Bevins, 2002).

In the area of relationships with learners, also consistent with ETs' beliefs, there is very strong evidence that they '[create] positive, accepting learning environments' (Schempp et al., 2002, p. 105) in classrooms typified as 'communities of learners' (Smith & Strahan, 2004, p. 365), where mutual respect and close, meaningful relationships are the norm (Gross, 2014; Yang, 2014) and positive reinforcement is frequent (Goodwyn, 2011) – consistent with the suggestion above that unconditional positive regard may be a key influence here.

3.8.4 Classroom Practices – Methodology and Interaction Dynamics

With regard to interaction dynamics, evidence points to significant diversity, and at times contradiction, at least concerning one frequently perceived 'dichotomy' between 'learner-centred' and 'teacher-centred' instruction – a large number of studies were found documenting the use of frequent and/or extensive whole-class teaching (WCT) by ETs (n = 10; e.g., Leinhardt, 1989), and many were found documenting regular use of learner-independent activities (n = 10; e.g., Smith & Strahan, 2004). However, as Hattie (2009, pp. 204–207) observes in his discussion of the often mistakenly maligned 'Direct Instruction' of Adams and Engelmann (1996), these two interaction patterns can work effectively together; indeed, several ET studies report on participants balancing carefully between both (e.g., Leinhardt & Greeno, 1986; Sorensen, 2014).

More specific observations are available on both these interaction patterns. During WCT, studies invariably report that it is predominantly interactive, including varied questioning strategies, elicitation and discussion (e.g., Arani,

2017) – rather than one-way lecturing – and several document ETs using a variety of means to explain or teach a specific point or concept (Schempp et al., 2002). Frequent questioning by ETs, not only during WCT, is documented to involve both closed- (e.g., Traianou, 2006) and more open-ended questions (e.g., Varrella, 2000), with some involving a focus on higher-order and critical thinking skills (Torff, 2006).

With regard to learner-centred interaction, there is very strong evidence of the regular use of collaborative learning (i.e., pairwork and groupwork) in the lessons of ETs (Gross, 2014), with some evidence of the more specific practices promoted in the literature on cooperative learning (Bevins, 2002), as well as evidence of peer-tutoring/instruction of various types (Chen & Rovegno, 2000). There is evidence that ETs monitor learner seatwork and groupwork during activities (Smith & Strahan, 2004), particularly to provide one-to-one tutoring and personalised support (Gross, 2014). While the nature of activity types used by ETs varies, there is strong evidence that some make regular use of inductive (e.g., problem-based/discovery) learning (Traianou, 2006; Yang, 2014).

3.8.5 Classroom Practices – Specific Techniques and Strategies

In these many, varied accounts of ET practice, there is strong evidence, from both WCT and independent activities, of ETs scaffolding learning effectively (Andrews & McNeill, 2005), and of their developing learners' understanding of content (Hayden et al., 2020), rather than simply knowledge. Mainly, but not exclusively during WCT, there is very strong evidence (n = 19) that ETs regularly link lesson content to – or build it upon – learners' prior knowledge and life experience (Chen, 2001; Meyer, 2004), consistent with the above-documented belief in this among ETs. There is also strong evidence that they are able to provide differentiated instruction according to learners' needs, interests and challenges (Goodwyn, 2011; Hattie, 2003), and that many focus on developing learners' autonomous study skills, encouraging responsibility, metacognitive awareness and self-directed learning among their learners (Chen, 2001).

Concerning more specific pedagogic practices, there is evidence in the ET literature both of significant variation between participants (Milstein, 2015; Sorensen, 2014), and even within participants, with a number of studies noting either a wide variety of strategies being used to convey content (e.g., Hogan et al., 2003; Schempp et al., 2002) – in language teaching, for example, there is evidence of ETs using an 'eclectic approach' (Tsui, 2003; also see Hanusova et al.'s (2013, p. 33) 'informed eclecticism').

3.8.6 Assessment Practices

In the area of assessing learning, there is more discussion of formative than summative assessment in the ET literature. There is strong evidence of a range of *assessment for learning* practices from a wide range of contexts (e.g., Hayden et al., 2020; Lin & Li, 2011), consistent with Black and Wiliam's (1998) findings in this area. In line with constructivist practices described above, new instruction is often reported to be preceded by assessment of current/prior knowledge (Meyer, 2004; Westerman, 1991), and there is strong evidence of ETs providing extensive, qualitative feedback to learners on their progress (Blackwell, 2020). They are also observed to engage learners in the assessment process itself (e.g., self-assessment, peer assessment; Hayden et al., 2020), and are able to make use of visual cues to assess both engagement and learning (Webb et al., 1997). However, perhaps the most regularly documented finding among ETs in the area of assessment is that it is continuous and integrated throughout lessons (i.e., assessment for learning; see Assessment Reform Group, 2002) (Asaba, 2018; Westerman, 1991). While there is much less discussion of summative assessment in the ET literature, there is some evidence of ETs regularly focusing on exam task skills and exam awareness raising, particularly in contexts where the influence of high-stakes examinations is strong (e.g., China; Yang, 2014).

3.9 THE MISSING HALF OF THE EXPERT TEACHER PROTOTYPE

The above review of expert teachers involves over 1000 expert teachers from over 100 empirical studies conducted in a wide variety of national contexts. As such, it offers a much more detailed expert teacher prototype than Sternberg and Horvath were able to provide in 1995. However, while seventeen different countries are represented, these are overwhelmingly high-income countries – 75% either North American or European. Of the nine Chinese studies included, all involved teachers in higher-income provinces on the east coast or more affluent central cities; other Asian countries represented (Japan, Malaysia, Thailand), like China, today fall comfortably within the high-income or upper-middle-income bands according to World Bank data (2019a) with the exception of Toraskar's study (2015), discussed below. Of course, this doesn't necessarily mean that all of the ETs involved in the above studies worked in privileged circumstances. There is evidence that a number worked with underprivileged learners in their own national contexts (e.g., Amrein-Beardsley, 2007, 2012; Tsui, 2003), but given that educational

authorities typically apportion similar funding per child for basic education within a given system, these teachers benefited from comparable funding, preparation and conditions to their peers across these national contexts.

Thus, the teacher expertise literature, and the description above based on it, offers an expert teacher prototype for half the world only – the more privileged half. While those concerned only with education in higher-income countries may perceive that this prototype will suffice for their needs, I would argue strongly that because it essentially neglects half the world, it is still incomplete. Not only is this potentially hazardous for those of us working in educational development insomuch as it leaves us with a model of expertise based exclusively on contexts outside of our field of interest, but it also fails to take account of all available contexts to understand the prototype itself more fully. However, if we are able to build a more complete picture of teacher expertise, and find that some of the features discussed above continue to hold true even in low-income contexts, this will not only provide us with a more reliable basis on which to promote certain practices in these contexts but will also furnish us with a better understanding of teacher expertise itself. The only study conducted in the South thus far offers tantalising, if limited, evidence of the nature of this wider construct.

3.9.1   Toraskar's Study in India

Toraskar's (2015) PhD case study of three expert Indian secondary exam class teachers working in Pune, Maharashtra, constitutes the only teacher expertise study conducted in a low- or lower-middle income country identified during the literature review, making it of great potential interest to this book. Her research questions address important issues through an approach that seems to have been sensitive to the context involved. She investigated definitions of expertise among the local community, the effects of the 'sociocultural context' on 'shaping [English as a foreign language] teacher expertise', and the characteristics of the teachers themselves (p. 3). Unfortunately, as she acknowledges on several occasions (e.g., pp. 85–86), she experienced significant difficulties during data collection that made it difficult for her to answer all but one of her research questions. Despite these challenges, Toraskar documents several interesting shared characteristics of the participant teachers in sufficient detail, including their principled use of learners' languages for a range of purposes, their understanding of their learners' challenges, natures and needs, and some evidence that the participants had well-developed pedagogical content knowledge. However, other claims (e.g., for 'improvisational

teaching'; p. 287) are not consistent with the evidence she offers to substantiate them. While she does discuss the contextual challenges her participant teachers faced, Toraskar fails to engage with the broader research literatures on teaching in the global South/developing countries, and draws only broad comparisons to cherry-picked evidence from the teacher expertise literature. Nonetheless, the limited findings that she presents are useful, and included in the discussion of both teacher expertise above and effective teaching in low-income contexts in Chapter 4.

3.10 CONCLUSION

This chapter has found that there are almost no studies of teacher expertise conducted in the global South to date, and that the only one found encountered difficulties that mean its findings must be interpreted with caution. As a result, while the above review has described some important 'family resemblances' among expert teachers studied to date, we know very little about the extent to which these features also apply to experts in the South. Nonetheless, it may be beneficial to investigate whether other ways of researching effective pedagogy in low-income countries offer potentially useful insights to inform our understanding of appropriate good practices in Southern contexts. Such insights may provide clues and pointers concerning the extent to which Southern teacher expertise may be similar or different to Northern expertise. This is explored in Chapter 4.

4 Effective Teaching in Low-Income Contexts

… many [developing] countries that have not raised enrolments fast enough to meet [Millennium Development Goals] have in fact raised enrolments extraordinarily rapidly by historical standards and deserve celebration rather than condemnation. The very few poor countries that have raised enrolment figures at the rates envisioned by the goals have done so in many cases by accepting dramatic declines in schooling quality, failing large numbers of students, or other practices that cast doubt on sustainability or exportability of their techniques.

(Clemens, 2004, p. 1)

When researching teacher expertise in the global South, it is important not only to review prior literature on teacher expertise worldwide but also to identify the challenges faced by practitioners working in Southern contexts, and to review what evidence exists on how teaching can be carried out appropriately despite these challenges. These are the focus of this second review chapter – on effective teaching in low-income contexts. While 'effectiveness' is argued above (see Section 2.3) to be too narrow as a construct to encapsulate the full range of competencies of our most valued teachers, it is nonetheless an important part of the fuzzy construct of expertise (see Figure 2.1) and a useful element in this wider picture, as a result. Further, given the near absence of research into teacher expertise in the South (see Section 3.9), teacher effectiveness – which has been researched fairly extensively in low-income countries – becomes the next best construct to investigate, particularly if defined as broadly as possible, as is done below.

I begin this chapter by identifying some of the most important circumstances and challenges encountered by teachers in low-income contexts

across the global South. This is followed by the presentation of the findings of a second detailed literature review that uncovers patterns in prior research concerning what teaching practices have been found to facilitate learning in the face of these challenges, both in studies of teachers identified as more effective practitioners, and in research into specific interventions carried out in the South to increase learning in the classroom. The chapter concludes by identifying key similarities and differences between the findings of this review and that on expert teachers in Chapter 3 and offering a cautious, critical conclusion to further justify the need for research into teacher expertise in the global South.

4.1 THE CIRCUMSTANCES AND CHALLENGES OF TEACHING IN THE GLOBAL SOUTH

In a working paper entitled 'The Long Walk to School: International Education Goals in Historical Perspective', Clemens (2004) makes the important, yet often overlooked, point that, over the last fifty or so years, a large number of countries in the global South have progressed from low to very high levels of enrolment in education in remarkably short periods of time – much shorter than almost all countries in the global North did historically, and as such, 'deserve celebration rather than condemnation' (p. 1). Likewise, Anderson and Lightfoot (2019) identify the 'great progress' that India has made towards universal primary education, particularly for girls, over the last few decades. However, this rapid increase in educational provision in many countries has had an inevitable material impact on quality in the classroom (Clemens, 2004), with evidence from some reports that levels of learning may have stagnated or even fallen over this period (e.g., ASER, 2017; Le Nestour et al., 2022). As one experienced Malawian teacher educator put it to me in 2012, commenting on observed increases in class sizes during his career, 'providing [the authorities] can get the students in the classroom and close the door, they do not care what happens inside'. Nonetheless, the very fact that the discourse in the educational development literature has shifted over the last decade from issues of access to issues of quality (e.g., Kumar & Wiseman, 2021; Tikly & Barrett, 2012; UNESCO, 2014, 2017) constitutes evidence of an achievement of sorts – resulting in the opportunity to focus on teaching effectiveness.

There are, of course, still many challenges that education faces in the global South, and while the majority of these originate in the exploitation and subjugation – both through colonisation and other forms of dependency – of the South, it is the financial chasm of investment and income, when compared to

countries on the other side of the North–South divide, that perpetuates most of these challenges today (Clemens, 2004; Huisman & Smits, 2009; Lee & Barro, 2001). To provide just one example of this, funding in India averages around or under 200 US dollars per pupil per year (Dongre et al., 2014) – just 2% of the 10,000 US dollars average yearly spend per pupil in OECD countries (OECD, 2020); across much of sub-Saharan Africa, per pupil expenditure is lower still. Even recognising that some expenditures (e.g., teacher salaries) are proportionately lower in lower income countries, this difference is still huge and, as I have observed in Chapter 1, constitutes the single most important variable influencing educational provision around the world today. These challenges are, of course, to some extent relative, and as some authors have pointed out (e.g., Ekembe, 2016), they may represent Northern expectations of what is normal, rather than concerns of practitioners in Southern contexts. However, given that, in the majority of cases, educational authorities in Southern contexts set ambitious targets for education that largely mirror those in the global North (see, e.g., India's National Education Policy; Government of India, 2020), these are all challenges that the states themselves typically seek to overcome; highlighting their diversity and extent enables us to understand the influence of contextual factors on teaching practices. In the following discussion, I separate these challenges into four groups, although overlap and linkage between them should also be recognised:

1. Challenges the learner faces

2. Challenges the teacher faces

3. Challenges within the school environment

4. Challenges of the wider educational system

While many of these challenges are found widely across low- and lower-middle-income countries, it is also important to note, firstly, that most are significantly exacerbated in rural areas (Buckler, 2011; Mulkeen, 2005; Qian & Smyth, 2008; Wang, 2011), and many are known to vary widely in their relative importance in different countries (e.g., Huisman & Smits, 2009); they are also likely to relate clinally to income level and educational expenditure, with more challenges being more apparent in low-income than in lower-middle-income countries.

Perhaps the largest group of challenges concerns those that the learner faces, deriving from aspects of their background, expectations of them and their readiness for attending school. Parents/caregivers may be reluctant for their

offspring to attend school, both due to direct associated costs, even when it is officially free (Hagberg, 2002; Lindsjo, 2018), and indirectly due to the loss of child labour (e.g., through farming or a family business; Webbink et al., 2012). Aside from their schooling, these learners often have other daily responsibilities that may take considerable time and effort, both before and after school (e.g., fetching water or firewood, minding siblings or tending livestock; Porter et al., 2011; Webbink et al., 2012). Some children may need to walk long distances to school or be unable to attend due to associated dangers, particularly girls (Porter et al., 2011); others may have poor levels of nutrition (anaemia, for example, impacts directly on learning potential; Rozelle & Hell, 2020), and no sustenance before coming to school, prompting the need for free school meal programmes where funds allow (Devereux et al., 2018). Learners whose caregivers have little formal education (so-called 'first generation learners'[1]; e.g., Velu, 2015) face additional challenges due both to lower school readiness (Britto, 2012) and low caregiver literacy levels, meaning that they cannot easily monitor or support their wards' learning. Often overlooked are more complex identity issues – beliefs that schooling is not appropriate, necessary, or accessible to us/me/our daughter (Hagberg, 2002), resulting in a lack of motivation towards education, both among parents and children. While typically associated with lower attendance among girls in many countries (Velu, 2015), such identity issues may also, I suspect, be a key contributing factor to the lower educational performance of many male students in rural India more recently (NCERT, 2018). Finally, all of these factors may be further compounded for minority ethnic, religious and language groups (Arouni et al., 2019), particularly if relationships between the authorities and the community are negative. Parents/caregivers/communities may perceive that schooling is there to serve others, rather than them (Hagberg, 2002), attitudes that frequently transmit to offspring (Wagner & Spratt, 1988).

Another group of challenges relates to the teacher, including their own personal circumstances (e.g., health, responsibilities and job security) and cognition (their beliefs, assumptions and knowledge, all of which may or may not interface well with expectations of them, particularly if they are expected to adopt more 'progressive' methodologies; Sriprakash, 2009; Tabulawa, 1998), their workload (e.g., multigrade teaching and double-shifting; Anderson, 2015b; Little, 1995), and importantly, their preparation for work, including

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[1] I prefer the term 'first generation schoolgoer', as 'first generation learner' implies that their parents and ancestors never learnt anything, which is obviously erroneous and potentially damaging.

their own schooling, their preservice teacher education – which may be non-existent – and in-service support (Lauwerier & Akkari, 2015). While there are important exceptions, much preservice teacher education in low- and lower-middle-income countries is overly theoretical, combined with an often unsupported practicum (Mulkeen, 2010) and offers little opportunity for experiential learning; this will tend to mean that teachers are more likely to reproduce the pedagogic practices they experienced as students uncritically, inadvertently also passing these on to their pupils as social norms, Lortie's so-called 'apprenticeship of observation' (1975).

Other challenges relate to the school itself, including infrastructure, available resources and its functioning (i.e., the wider topic of school management, for which there is a separate, extensive literature; see Galiani & Perez-Truglia, 2013). These challenges – all directly evident to the observer – are frequently reported in the literature on 'teaching in difficult circumstances' (Anderson et al., 2021; Kuchah, 2018; West, 1960) and include 'insufficient and/or outdated textbooks, crowded classrooms with limited space, and lack of adequate resources and facilities for teaching-learning, including ICT' (Shamim & Kuchah, 2016, p. 528); see Figure 4.1.

Further challenges may originate in the wider educational system, particularly the frequently reported and damaging impact of overloaded (too much content) or overambitious (too rapid in progress) curricula (e.g., Alexander, 2000; Banerji, 2019a; Pritchett & Beatty, 2012, 2015; Wang, 2011; World Bank, 2019b). This presents particular challenges for educational systems looking to move towards more 'progressive' approaches (e.g., learner-centred, constructivist and activity-based), because, simply put, the more content there is in a curriculum, the more teachers feel the need to 'cover' the curriculum, and typically do so through teacher-led, often rote learning (e.g., Meganathan, 2018; Padwad & Dixit, 2018), what Wang (2011, p. 161) calls 'lecturing as defensive teaching'. Another area where the educational system itself may exert a negative impact on learning is through the promotion of inappropriate language-use practices in classrooms through language-in-education policy (see Mahapatra & Anderson, 2022), especially languages of instruction that differ from learners' first languages, and are frequently introduced either too soon or too suddenly, meaning that learners (and sometimes teachers) have significant difficulty understanding curriculum content (see, e.g., Simpson, 2019). Another factor that tends to be systemwide and potentially more damaging in Southern contexts is inappropriate assessment practices, especially high-stakes, low-validity examinations at key stages of education, further causing teachers to engage in rote learning of explicit content or 'teach[ing] to the test' (Burdett, 2017).

Figure 4.1 Rudimentary classroom, Eritrea, 2008
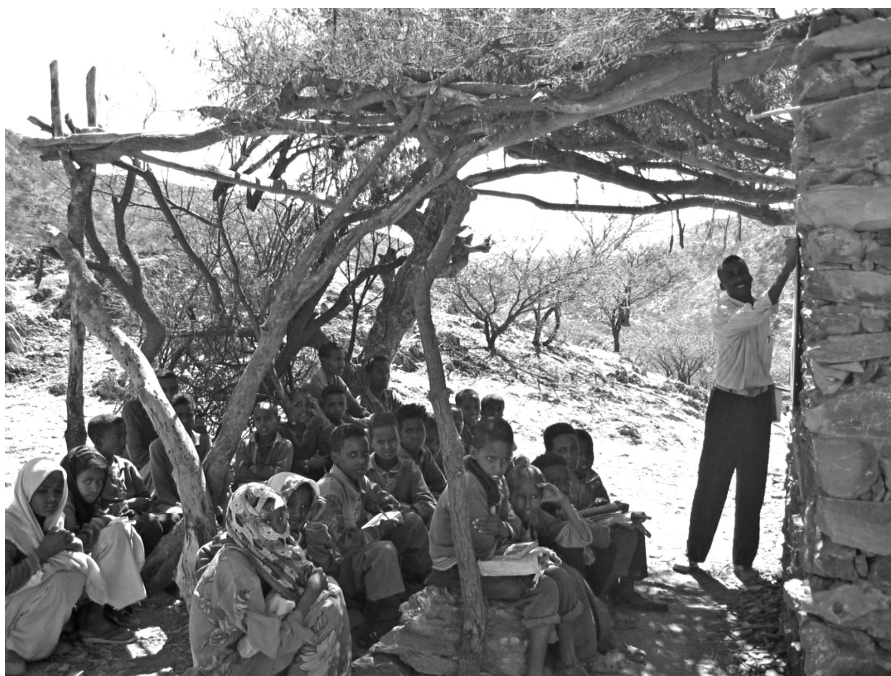
The challenges identified here indicate strongly that teaching and learning in the lower-income contexts of the global South differ materially and significantly (albeit clinally) from education in higher-income contexts. Thus, it cannot be assumed that research on 'what works' in the global North is directly transmittable to the global South, and as a result, our understanding of appropriate good practice in Southern contexts requires separate consideration.

4.1.1 Defining Effective Teaching Appropriately

Before reviewing the research on teacher effectiveness in the global South, 'effectiveness' needs to be defined. While the construct of effectiveness has been examined in Chapter 2, the review below draws on a wide range of study types that adopt (or assume) varied definitions of effectiveness. The majority of studies aspiring more to the generalising tendency in educational research (see Section 1.4), particularly quantitative/econometric research, typically adopt the narrower view that learner academic achievement (as measured through exam performance) constitutes the sole valid measure of effectiveness (e.g., Aslam & Rawal, 2015), despite the dangers involved in such an

approach (see Section 2.3). However, other types of effect can also be identified and are often valued by key stakeholders within the education system itself. Thus, both below and throughout this book, I adopt a wider definition, as proposed by Westbrook et al. (2013), specifically for developing country contexts. They define effective pedagogy as 'those teaching and learning activities which make some observable change in students, leading to greater engagement and understanding and/or a measurable impact on student learning' (p. 8). Such a broad definition of effectiveness also allows a wider range of studies to be considered in this area of limited research, although this should be done with criticality, both of the studies themselves and any extrapolations made from their findings (see Section 4.8). The potential validity of any research in education lies in our interpretation of its findings for practice, which, given the varied conditions and challenges across the global South, must always be done cautiously.

4.2 REVIEW PARAMETERS AND METHOD

To conduct the literature review below, I searched for research documenting all and any aspects of teacher effectiveness consistent with the definition provided above in both low- and lower-middle-income countries, according to World Bank statistics (2019a). The search was restricted to primary and secondary levels in mainstream education (including private, but not extracurricular provision), and to studies and reviews published during the twenty-first century, given the changing circumstances in most of the countries involved. Three databases were consulted (ERIC, Web of Science and Google Scholar), both through searches employing specific syntax combinations (ERIC, Web of Science only) and a wider range of terms (including relevant subtopics: teacher knowledge, formative assessment, etc.) in Google Scholar. Both back- and forward-citation searches from relevant studies were also conducted to supplement these direct searches. A small number of survey reviews on teaching/teacher effectiveness in developing countries were found, which, although drawing on varied methodologies, all adopted rigorous, systematic procedures and offered useful, generalisable results (e.g., Aslam et al., 2016; Conn, 2017; Pryor et al., 2012; Westbrook et al., 2013); the findings of both these and larger-scale quantitative studies (Azigwe et al., 2016; Buhl-Wiggers et al., 2018) are supplemented with those of smaller scale primary research, usually qualitative, which shines useful light onto specific classroom practices.

Because the teacher effectiveness literature tends to focus more on aspects of pedagogy rather than cognition or professionalism, it is pedagogy that constitutes the core focus here; there is still comparatively little research on aspects of cognition among effective teachers in developing country contexts, although some findings concerning effective teacher knowledge and professionalism are also reported on below.

The evidence presented here comes mainly from sub-Saharan Africa and South Asia, although one study from China's lowest income province (Park & Hannum, 2001) and a small number of studies from Latin America were also included (e.g., Alvarado, 2006; Marshall & Sorto, 2012).[2]

4.3 TWO GENERAL FINDINGS

Two general findings of importance emerge from this review. Firstly, there is clear evidence that teacher quality matters in developing countries (i.e., it has a clear, direct impact on a range of measures of learning outcomes: Aslam & Kingdon, 2011; Buhl-Wiggers et al., 2018; Conn, 2017; Kumar & Wiseman, 2021; Park & Hannum, 2001; Power & McCormick, 2014), probably much more than in developed countries. In Ghana, Azigwe et al. (2016) found a higher percentage of total variance in mathematics achievement attributable to classroom factors (55%) when compared to prior research in developed countries (<40%), and in Uganda, Buhl-Wiggers et al. (2018) document a higher impact on student performance from teacher effectiveness (0.09–0.19 standard deviations) than is typically reported from higher-income contexts, such as the USA (0.08); similar results are reported from Pakistan by Bau and Das (2017). Conn's meta-analysis of education interventions in sub-Saharan Africa (2017) found interventions focusing on improving aspects of teaching had much larger effect sizes (0.30 standard deviation difference) than all other program types.

Secondly, there is evidence of the 'deeply contextual' nature of effective pedagogy in at least some contexts in the global South (Aslam et al., 2016, p. iii; also Alexander, 2008). To illustrate this, some studies have found that teachers who either come from (Park & Hannum, 2001), or live in (Singh, 2013), their learners' village can be more effective than those who do not.

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2   Many countries in Central and South America are today classified in upper-middle and high-income brackets (World Bank, 2019a), although educational provision often lags behind these rising net income levels particularly in rural areas, meaning that many still face many of the challenges discussed earlier.

Rawal and Kingdon (2010) note that in India students learn more from teachers who share their gender, caste or religion (all three have independent impacts) than from teachers who do not. Unfortunately, because these studies are statistical, reasons for these learning increases are not clear and, I suspect, may be influenced by issues of trust, shared identity, shared schemata and/or shared language or dialect.

Findings in the following sections focus on specific areas of practice and are organised according to the categories that arose during data analysis.

4.4 TEACHER KNOWLEDGE AND BELIEFS

There is evidence that teacher knowledge is important to effective teaching in developing countries, including subject knowledge (Alvarado, 2006; Aslam & Rawal, 2015; Harley et al., 2000), and particularly PCK, for which a large number of supporting studies were found (e.g., Alvarado, 2006; Cueto et al., 2017; Mamba & Putsoa, 2018; Marshall & Sorto, 2012; Westbrook et al., 2013). Additionally, a study in Ghana (Kuyini and Desai, 2007) found that more effective teachers had greater knowledge about inclusive practices.

With regard to the beliefs of more effective teachers, there is little evidence and no clear patterns. In South Africa, Harley et al. (2000) found evidence of conflicts between the values of the local community, which the effective teachers in their study often shared, and those of national educational policy; these teachers were willing to ignore the latter in their practice because they 'placed more trust in their own beliefs, experience and judgements' (p. 296). Kuyini and Desai's study (2007) found that teachers who had positive attitudes to inclusion were more effective in their teaching than those who didn't.

4.5 TEACHER PROFESSIONALISM

There is evidence that teacher confidence and attitude to work are important, often correlating with measures of teacher efficacy (Aslam & Rawal, 2015; Westbrook et al., 2013), including in India (Sehgal et al., 2016; Singh, 2013). Alvarado (2006) discusses an association between teacher empowerment and more effective practices in Central America, including through increased self-confidence, greater willingness to engage in risk-taking, an environment of enhanced communication and participation in decision-making. In South Africa, Harley et al. (2000) observed that most of the effective teachers in their cohort engaged in lifelong learning.

There is some evidence, albeit not strong, for more reflective practices among effective teachers in developing countries. Pryor et al. (2012) note a tendency towards a 'more reflective approach' among more effective teachers in East Africa, who were also willing to take personal responsibility for their pupils' learning, recognising that 'if a child could not read it may be the fault of the teacher' (p. 482). Alvarado (2006) mentions 'critical and constructive thinking skills' as important to effective teaching, also discussing the importance of teachers' receiving feedback from students, peers, principals and parents, particularly in 'an established culture of self-learning' (p. 12). Harley et al. (2000) found little evidence for reflection in the practices of their effective teacher cohort. Likewise, Westbrook et al. (2013) note that reflective practice as a teacher development mechanism had only 'limited success' in two studies from Eritrea and Namibia.

4.6   PEDAGOGIC PRACTICE

4.6.1 Curriculum Coverage and Planning

Concerning curriculum coverage and adaptation, only a small amount of evidence was found, including by Westbrook et al. (2013), who conclude from a number of studies that more effective teachers are able to manage and tailor the curriculum appropriately to their learners' needs. Buhl-Wiggers et al. (2018) report that 'moving through material at a slower pace to ensure the acquisition of fundamental literacy skills' (p. 7) was a key component of their intervention.

Honing in on lesson planning itself, Westbrook et al. (2013) found that 'teachers who planned lessons taught a better sequence of tasks' than those who didn't, emphasising the importance of variety that such planning brings (p. 59). Correlations have also been found in a number of studies between careful planning and improved learning outcomes (e.g., Aslam & Kingdon, 2011; Buhl-Wiggers et al., 2018), although exactly what planning is involved is not clear; Buhl-Wiggers mention 'solid lesson plan' (p. 15) without further explanation, which is necessary, given evidence reported in Section 3.8.1 that many expert teachers plan mentally with no written notes. Concerning the extent to which controlling teachers' classroom practices through the use of scripted lesson plans and guides increases learning, Piper et al. (2018) indicate that the use of such guides only improves learning outcomes if they are not too prescriptive, allowing teachers some flexibility through what they call 'structured lesson plans' rather than scripts. Macdonald and Vul (2018)

report increased learning from the partial use of scripted plans specifically for developing early-grade reading skills in Papua New Guinea.

There is also some evidence associating either regular or varied use of TLMs with higher learning outcomes (Bhattacharjea et al., 2011; Ngware et al., 2014; Pryor et al., 2012; Westbrook et al., 2013), the majority of which comes from studies in primary grades, often involving specific interventions requiring the use of pre-prepared TLMs (e.g., for activity-based learning; Addy et al., 2012) that may be unsustainable (see Section 4.8).

4.6.2 Interpersonal Practices and the Classroom Community

While evidence in this area is not extensive, Westbrook et al. (2013), in their large-scale review of the literature, document the importance of safe, supportive, inclusive learning environments in more effective classrooms, where positive relationships are prioritised (also Addy et al., 2012). In South Africa Harley et al. (2000) found evidence of relationships of trust and mutual respect and established role boundaries between more effective teachers and their learners; as a result, 'authoritarianism' and 'repression' were rarely required. In India, correlations have been noted between improved exam scores and more 'child-friendly' classrooms, where teachers smile, laugh and joke more (Bhattacharjea et al., 2011) and are considered by learners to treat them fairly (Singh, 2013). There is also evidence that more effective teachers are careful to be inclusive of marginalised and disadvantaged students, both from Laos (Grimes et al., 2011) and India (Sarangapani et al., 2013; Sharma, 2013).

4.6.3 Classroom Practices: Methodology and Interaction Dynamics

A number of studies in the literature report on the extent to which more effective classroom practices involve either 'teacher-centred' instruction (including teacher-led, whole-class teaching) or 'learner-centred' practices such as collaborative pair and groupwork, the use of more constructivist techniques, and 'progressive' approaches (e.g., activity-based or cooperative learning).[3] This is a complex and contested area in the literature on pedagogy in international development (see Schweisfurth, 2013a; Tabulawa, 2003), meaning that observations here may be biased by the nature of specific interventions and

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[3] Scare quotes are used here in an attempt to distance this discussion from the often oversimplified teacher-centred–learner-centred dichotomy. I prefer to use the terms 'teacher-led' and 'learner-independent' instruction/activities (see Section 9.13).

their intentions. Nonetheless, there is evidence from a number of sources that more effective teachers in developing countries are able to balance between or draw upon strategies from both approaches eclectically. Azigwe et al. (2016, p. 59) note that 'an integrated approach', including 'direct and active instruction … and constructivism' contributed to effectiveness in mathematics lessons. Westbrook et al. (2013, p. 37) report a 'judicious combination of both student- and teacher-centred pedagogical practices, integrating newer pedagogies with more traditional ones' among more effective teachers (also Addy et al., 2012; Mamba & Putsoa, 2018). Consistent with this, Nordstrum (2015, p. 44) notes that more effective teachers typically begin lessons with whole-group instruction followed by independent (individual) work in ways that were broadly consistent with Direct Instruction (see Section 3.8.4).

However, not all studies support a balance between the two. Concerning teacher-led practices, Harley et al. (2000) found that teacher lecturing predominated among effective teachers in South Africa, and Marshall and Sorto (2012) found higher levels of teacher-led instruction more effective in rural Guatemala. Concerning more learner-independent activities, Azigwe et al. (2016), found that, of nine teacher-related factors, the one that impacted most strongly on learner achievement was 'application' through the use of seatwork and small group tasks, both for learner-independent practice and for lead-ins to specific activities.

During learner-independent activities (both collaborative groupwork and individual seatwork), there is evidence from several studies that teachers who are 'active throughout [the] classroom' (Buhl-Wiggers et al., 2018, p. 28), increasing student participation and engagement, are more effective than those who are not (also see Addy et al., 2012; Sharma, 2013; Westbrook et al., 2013). This is consistent with Westbrook et al.'s (2013) key finding that interactive, communicative pedagogy encouraging student engagement and participation leads to improved outcomes, also supported by Pryor et al. (2012) and Nordstrum (2015).

Specifically with regard to collaborative learning (pair and groupwork), there is consistent, although sometimes weak evidence (in terms of effect sizes) that the inclusion of 'student to student interactions' (Buhl-Wiggers et al., 2018, p. 31) has a positive impact on outcome measures (also Azigwe et al., 2016). This includes evidence that groupwork can be effective in mixed-ability large classes (Pryor et al., 2012) and at both upper secondary (Westbrook et al., 2013) and primary (Marshall & Sorto, 2012) levels. In India, Bhattacharjea et al. (2011) noted small group groupwork had a significant impact on learning at grade 4, but not at grade 2, and experimental studies in two countries

(Zambia and Kenya) found the more specific practices of cooperative learning to be effective in science classes (Awoniyi & Kamanga, 2014; Muraya & Kimamo, 2011).

4.6.4 Classroom Practice: Specific Techniques

Consistent with constructivist theory, there is evidence that more effective teachers link learning to learners' lives and experiences in the global South (Grimes et al., 2011), including India, where Bhattacharjea et al. (2011, p. 8) note that teachers who make use of 'local examples' have a higher impact on learner exam performance (also Sharma, 2013).

There is strong evidence that more effective teachers engage in varied questioning, open and closed, during both teacher-led, whole-class instruction and while supporting autonomous activities (Aslam & Kingdon, 2011; Azigwe et al., 2016; Mamba & Putsoa, 2018; Nordstrum, 2015; Sharma, 2013; Westbrook et al., 2013). A number of studies also found that more effective teachers create space for learner questions (Addy et al., 2012; Nordstrum, 2015; Westbrook et al., 2013). For example, Nordstrom (2015) observes that, as well as dedicating 'more time to answering students questions', higher performing teachers were prepared 'to interrupt the flow of lessons to address students' concerns or questions regarding the assigned task of lesson content' (p. 44); similar practices are also linked to higher exam scores in India (Bhattacharjea et al., 2011).

However, concerning focus on, and development of, higher-order thinking skills (e.g., creativity and critical thinking), there is little evidence of these among effective teachers in developing countries. Mamba and Putsoa (2018) found no relationship between a focus on higher-order skills and performance, and Harley et al. (2000, p. 295) note that these were among the 'least observed competencies' among their study participants (also Vavrus & Bartlett, 2012).

4.6.5 Multilingual Practices

Due in part to the greater diversity of languages in many countries in the global South (de Grauwe, 2006), and in part to the colonial past that many share, language-in-education, both in policy and practice, is becoming a key issue in instructional effectiveness (see Heugh, 2021; Mahapatra & Anderson, 2022). Consistent with this, there is strong evidence in the teacher effectiveness literature supporting the use of both mother tongue–based education and multilingual practices (e.g., codeswitching/translanguaging). Despite the

dominant trend for education to be provided primarily in exogenous media of instruction (MOI; e.g., English and French) during much of the twentieth century across the global South, Heugh et al. (2019) document consistent evidence supporting higher achievement for multilingual and mother tongue–based approaches dating back to 1946.

Concerning mother tongue–based education, Verspoor (2005, p. 26) reports two consistent trends; 'active acquisition of early literacy in the mother tongue' and 'high-performance in the second language in the upper primary grades' resulting from the use of the mother tongue in early schooling. This is supported by more specific studies, including evidence of a positive association between teachers' knowledge of learners' languages and student achievement (Walter, 2015) and students' positive attitudes towards teacher use of the mother tongue in primary grades (Fakeye, 2011).

In contexts where teachers are expected to provide instruction in exogenous media of instruction, evidence indicates that the use of familiar, local languages alongside the MOI 'greatly facilitate student learning' (Westbrook et al., 2013, p. 58). Pryor et al. (2012) observe that more effective teachers 'often show deeper understanding of how to draw on two or more languages and to use code switching' (p. 482). These findings are also supported by Toraskar's (2015) expertise study in India; she observes that her three expert secondary teachers consciously simplify their English, and engage regularly in 'code-switching' (p. 288), for example, to translate lexis, explain complex concepts and text content, while also permitting their learners to use their mother tongue when they were unable to respond in English.

4.6.6 Formative Assessment and Feedback to Learners

Evidence concerning the impact of teacher formative assessment practices on teacher effectiveness in developing countries is limited but increasing, particularly concerning feedback on learners' work. While several studies report little evidence of formative assessment among more effective teachers (e.g., Harley et al., 2000; Mamba & Putsoa, 2018), support does exists, particularly from a study by Kyaruzi et al. (2019) who found a weak but positive association between appropriate formative assessment practices and student achievement in Tanzania. Their study usefully included qualitative data, enabling them to investigate relationships between how teachers provided feedback and student uptake. Students particularly emphasised the need for feedback that was 'confidential, helpful, and friendly' (p. 292). The authors conclude that 'when feedback is perceived as scaffolding and well

delivered by teachers it can enhance feedback use which in turn can contribute to greater learning outcomes' (p. 293). Pryor et al. (2012) discuss evidence of a 'diagnostic approach to assessment' among more effective teachers that involved identifying struggling learners and offering them greater support. Consistent with this, Westbrook et al. (2013) note that more effective teachers provide useful, individualised feedback to learners, and Singh (2013) notes a correlation between regular teacher correction of notebooks and higher exam achievement. Conn (2017) also found that studies 'that emphasise formative assessment and targeted instruction' (p. 878; no further details provided) were associated with higher learning gains, and there was some evidence for intermittent assessment of prior learning from Aslam and Kingdon (2011), who found more effective teachers quizzed their learners on past material.

4.7 COMPARING TWO REVIEWS OF TEACHER QUALITY

The two literature reviews in this and the previous chapter serve as an evidence baseline of sorts for the empirical research that is to follow, summarising what is known about both teacher expertise and the challenges and solutions of more effective teachers working in low-income contexts. Despite the fact that the two chapters adopt very different approaches to conceptualising and investigating quality in the classroom, several similarities can be observed between the findings they offer, as well as a number of areas where there is either difference or insufficient evidence; both are summarised briefly here.

Firstly, both reviews clearly support the opinion that teachers and teaching quality matter, as others (e.g., Hattie, 2009, 2012) have already demonstrated. Secondly, for teachers to be effective, they need to have an extensive, integrated knowledge base, both of their subject and how to teach it – Shulman's pedagogical content knowledge (1987) is supported by both reviews. Thirdly, despite great variety in aspects of pedagogy, evidence was found for broadly eclectic practices in the classroom, incorporating aspects of both teacher-led and learner-independent lesson stages and activities. Evidence is also generally supportive of both collaborative learning and active monitoring of learners during learner-independent activities. The importance of interactive teaching, particularly appropriate questioning, comes through clearly in both reviews; likewise, the practitioners involved are frequently reported to adapt their instruction to learners' needs, backgrounds and prior knowledge, consistent with constructivist theory. Further, both bodies of evidence indicate that expert/effective teachers provide supportive and inclusive learning

environments, demonstrating and cultivating respect within the classroom community. And finally, there is evidence that more effective teachers engage in formative assessment (although details are somewhat lacking) and provide useful feedback to their learners.

However, there is less clarity on other areas, either due to a lack of evidence (LoE), or a diversity in findings (DiF). Planning practices seemed to vary, being described as sometimes fluent and unwritten, and sometimes detailed and written or scripted (DiF). While both bodies of literature seem to support the view that more effective teachers experience fewer behaviour management challenges, exactly how they obviate these is less clear (LoE). There are no obvious common patterns in the beliefs of the teachers investigated between the two bodies of literature (LoE), and no evidence was found for specific cognitive processes in the second body of literature reviewed (LoE). Likewise, while certain aspects of teacher professionalism that are frequently documented in the teacher expertise literature (e.g., reflective practice, lifelong learning, self-efficacy) are also suggested in the literature on Southern teacher effectiveness, this remains to be confirmed (LoE). Finally, concerning what we might call the 'languaging practices' of the teachers involved, while evidence is strong that these are both flexible and accommodating to learners' mother tongue and multilingualism across the global South, this has not been a focus of teacher expertise studies to date (LoE).

4.8   A CRITICAL CONCLUSION

The literature review presented in this chapter draws on a wide range of sources in an attempt to collate what we know to date concerning the practices of effective teachers working in the challenging circumstances typically found across the global South. In doing so, it necessarily collates research adopting very different approaches and very different conceptions of effectiveness, although the majority measure it quite narrowly in terms of student learning outcomes. Nonetheless, it provides a useful starting point in our attempt to understand what may constitute features and practices that are indicative of teacher expertise in the global South.

However, a key concern that needs to be addressed at this point relates to the extent to which the studies actually do reflect the practices and cognition of effective Southern teachers as opposed to the beliefs and aims (no matter how well intended) of individuals and organisations involved in attempting to improve pedagogical quality in specific Southern contexts. To take one

Figure 4.2 Study types and outcomes in Westbrook et al. (2013)
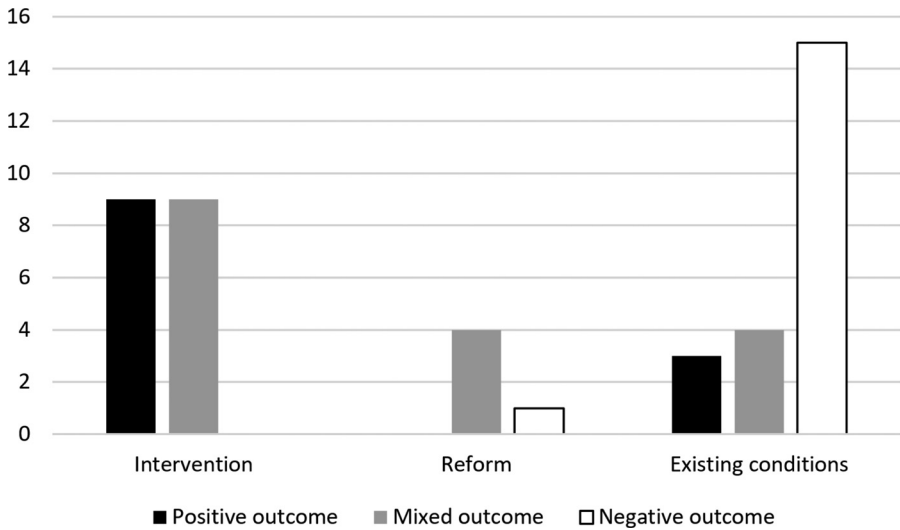
example, in probably the most detailed and informative survey review discussed above – the study by Westbrook et al. (2013) – analysis of the types and the outcomes of forty-five studies reveals two important insights (see Figure 4.2). Firstly, that just over half of these studies (n = 23) report on attempts to change teacher practice through interventions and reforms. As such, they may reflect little, possibly nothing, of the participant teachers' *actual* practices independently of these interventions. And secondly, of those that do report on actual practices ('existing conditions'), only a fraction (n = 3) report a positive outcome – they were significantly outnumbered by those with negative or mixed outcomes (indicative of the deficit tendency of much research in the South). As such, because these studies include a large proportion of exogenous interventions and less effective practices, they leave us still understanding very little about our topic of interest: endogenous[4] effective

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[4]   In this study, I prefer to use the term 'endogenous' rather than 'indigenous' to describe expertise and practices that have developed in a specific context. While 'indigenous' carries with it a connotation of fixed 'nativeness', unchanged by external influences, 'endogenous' (meaning simply from within) seems more appropriate to describe the complex socioculturally embedded practices that typify education; practices that are as much a product of cross-cultural influences and historical legacy (e.g., colonialism) as of 'traditional' or 'pre-colonial' practices (Bruner, 1996). I contrast it with 'exogenous' to describe recently imported or unfamiliar practices and innovations.

pedagogy among Southern practitioners. And while those interventions that were successful demonstrate some degree of *feasibility* for the practices they describe (insomuch as they can be implemented in challenging contexts), they may fail to meet two other important criteria – *appropriacy* and *sustainability* – without which any change initiative is unlikely to succeed. In contrast to this, studies of endogenous teacher expertise are much more likely to meet the appropriacy and sustainability criteria, insomuch as they evolved in the context of interest over several years.

Thus it is reasonable to conclude that the review offered in this chapter is only indicative, at best, of effective practices in the global South. To gain a true understanding of these, it is necessary to go back to the proverbial 'drawing board', to find established expert/effective/successful practitioners in their own classrooms, and to document, interpret and learn from their practices. Chapters 5 to 8 describe my attempt to do just this.

5　Researching Teacher Expertise in the Global South

…if you can't say what Quality is, how do you know what it is, or how do you know that it even exists? If no one knows what it is, then for all practical purposes it doesn't exist at all. But for all practical purposes it really *does* exist. What else are the grades based on? Why else would people pay fortunes for some things and throw others in the trash pile? Obviously some things are better than others … but what's the 'betterness'? … So round and round you go, spinning mental wheels and nowhere finding anyplace to get traction. What the hell is Quality? What *is* it?

　　　　　　—*Robert Pirsig, Zen and the Art of Motorcycle Maintenance, 1974*

5.1　INTRODUCTION

At first glance, teacher expertise studies seem apparently simple in their design: find expert teachers, visit them and collect data on what they do and why, analyse that data and present the findings to contribute to our understanding of what expertise is, how it develops and how we can nurture it in others. However, as this chapter will reveal, at each stage in this process, complex challenges are met, each of which could affect the reliability and validity of the study and its findings. And at the heart of these challenges is one key issue – how we behold quality – the very challenge that haunted the protagonist of Pirsig's novel *Zen and the Art of Motorcycle Maintenance*, as the epigraph above reveals. These core challenges of expertise studies are often amplified when researching expertise in contexts where it is more elusive or qualitatively different. This includes the difficult circumstances that

most teachers face in the global South, alongside other challenges of context identified in Chapter 4.

This chapter begins by exploring the methodological challenges encountered when conducting a teacher expertise study, particularly those challenges that may be greater when a researcher is working in the global South. I then present what I perceive to be key requirements for an appropriate, ethical study of teacher expertise in the global South – requirements that I believe I met reasonably well in my own PhD research project. The procedure I adopted is then described briefly. By moving from the challenges to the requirements and then the solution adopted, I hope this chapter is able to offer useful guidance for other researchers into how such challenges can be identified and overcome methodologically. The chapter concludes with a detailed review of participant selection criteria for teacher expertise studies over the last four decades and proposes a means for researchers to make use of multiple criteria to identify participants for such studies reliably in a range of contexts worldwide.

In this chapter, my own background and identity as a researcher from the global North come to the fore on a number of occasions, and it is likely that through my discussion of the challenges I faced I risk implying that all researchers working in the global South will also be working cross-culturally. However, I am very much aware that other researchers may themselves have specific ties to the contexts they are investigating (e.g., personal ethnic heritage or linguacultural affiliation). For such researchers, certain challenges discussed below may be less prominent (e.g., the Observer Effect for those researching within their own institutions), and others (e.g., the challenges of 'seeing afresh' that which is familiar; Finlay, 2012) may be more evident (see, e.g., Colic-Peisker, 2004; Ergun & Erdemir, 2010).

5.2 METHODOLOGICAL CHALLENGES

The methodological challenges encountered when researching expertise can be broken down into three sequential stages: (1) finding participants; (2) studying their practice; (3) interpreting their practice. Each is explored briefly here, including in expertise research in general and more specifically in the global South.

5.2.1 Finding Participants

A number of challenges present themselves to the researcher when trying to find participants for any study of expertise. First, the researcher

must define expertise, and this definition must remain cognisant of what is valued in expertise in a given context (see Chapter 2). Then one must find examples that are consistent with this definition. However, there are two pitfalls sometimes encountered at this stage, particularly by researchers who do not reflect on their own personal bias. The first is what I have called Pygmalion sampling, in which the researcher, consciously or unconsciously, allows their own vision of expertise to 'shape' their study participants, as Pygmalion did with the statue he carved and subsequently fell in love with. This can happen in two ways: In Amy Tsui's study (2003) of an expert teacher in Hong Kong, it happens through the author influencing the practice of her participant, Marina (pseudonym). Marina studied under Tsui, on at least three occasions, both before and during Tsui's data collection (the latter's influence is evident on pp. 90–91 and p. 96), and she also implemented changes in her classrooms under Tsui's guidance (see Chapter 9 of Tsui's book). As such, Tsui's insightful portrait of Marina will always be influenced by her own vision of expertise manifested through her protégé. The second way in which it may happen is if researchers select participants by evaluating their practice, either directly, as Sabers et al. (1991) did, or indirectly, as Westerman (1991) did, selecting participants based on 'how well their teaching [as observed by intermediaries] matched our goals' (p. 294). Westerman's study then goes on to report on some of these practices as findings – an obvious example of circular reasoning. While Sabers et al. do not commit this error (they engage the participants in an experimental task to investigate more specific aspects of their cognition), their findings are still limited by their own unexamined assumptions concerning what expertise is. As such, both constitute examples of Pygmalion sampling – not through the 'shaping' of participants' practice, as happened in Tsui's study, but by cherry-picking the participants themselves.

A second, related threat to the validity of expertise studies that may occur during participant selection is that of the imposition of exogenous norms, either through our choice of selection criteria (criteria norms), or the selection process itself (process norms); this danger is particularly great for researchers working cross-culturally and for researchers investigating expertise in under-researched contexts (e.g., the global South). A simple example of criteria norm imposition would be to draw upon the findings of prior expertise studies as a means to identify participants. While this is problematic even within a specific context – because it is likely to cause researchers to simply reproduce, and thereby over-augment the findings of prior studies (as Smith Feger does; 2009) – cross-contextually, there are good reasons for assuming that such

norms may not apply. In the global South, where we know almost nothing about teacher expertise, we cannot assume that it is similar to expertise in the global North; it thereby follows that criteria norms for expertise studies (which, to date, originate in the North) cannot be used to identify participants in the South. Concerning process norms, it cannot be assumed that certain selection approaches are likely to yield results as reliably as they do in other contexts. An example of this is the nomination approach, frequently used in expertise studies (Palmer et al., 2005). In many higher-income contexts, there is good reason to believe that both school inspectors and headteachers have both the knowledge and the observation experience to identify appropriate potential participants. Although this may at times lead to red herrings, if triangulated with other selection criteria, it constitutes a useful indicator of community-referenced expertise (see Chapter 2). However, due to systemic challenges in many contexts in the global South, school inspectors and headteachers may lack the required skills to identify appropriate participants (see, e.g., Kuchah, 2013), meaning that this process is less likely to be reliable. Toraskar's study (2015) adopts such an approach in India, where evidence indicates that both of these problems exist (Bambawale et al., 2018; Lahiri, 2021).[1] Other potentially problematic process criteria include the use of learner exam scores (which may lack validity and/or reliability), and the use of teacher awards or competitions (which themselves may not be based on appropriate criteria).

5.2.2 Studying Participants' Practice

It is a harsh but unsurprising reality that a large amount of educational research conducted in the global South is carried out by researchers either from, or based in, the global North. This further exacerbates the inequality that is frequently documented to exist between researcher and participants (Atkinson & Hammersley, 2007), including in educational research (Tikly, 2011). This leads to a large power differential, which in turn can lead to a number of associated problems. Perhaps first among these is the very real danger of exploitation, with research participants feeling pressurised to participate, not just in a project as a whole (which can be stressful, disruptive and time-consuming for them), but to make changes, concessions and take on extra responsibility as a result of the project. Particularly if a researcher is approaching participants through an intermediary (e.g., local administrator, headteacher), the researcher may not be aware of this pressure.

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[1] Toraskar does attempt to triangulate this process criterion with another – evidence of higher learner achievement for her selected participants.

Closely linked to this issue of exploitation are a number of consent-related concerns that may be exacerbated in the global South. School authorities in many Southern contexts today understand the need for parental consent for data collection, but how this is gained is complex, particularly among non-literate parents who can neither read information sheets nor sign consent forms (Upvall & Hashwani, 2001). Even those who can sign such forms are often reluctant to do so, and many may feel more comfortable giving verbal consent only (Tekola et al., 2009). However, the learners themselves are not always consulted after parental consent is gained, and even if they are, they may not find the courage to refuse. They need to be consulted with care, ideally offering them the choice either to opt in or opt out, rather than simply gaining permission to collect data. This may be done through, for example, having sections of a classroom that are not filmed during lesson observations, or by requesting volunteers for focus group interviews.

A third, practical concern is the influence of what is typically called 'reactivity' in ethnographic research (e.g., Atkinson & Hammersley, 2007), also known as the Observer or Hawthorne Effect. Put simply, this is the effect that any researcher may have on the research subjects. In education, this obviously includes the influence that an observer in a classroom has on the teacher's and learners' behaviour, but also extends far beyond these, to the presence of the observer in the school and even the local community, particularly in rural areas, which has a real, direct impact on the validity of the data collected. However, a second, often overlooked impact is the disturbance it may cause to the school community, highlighted to me when, during a three-week school visit, the headteacher requested I stayed in the staff room during breaks/recesses, so as not to 'excite' the students – a decision I fully understood and respected, even if it was rather problematic for my research.

Other challenges that manifest themselves during the data collection process include rights to the data collected (Does the teacher also have a right to retain copies of the data? What about the school?), the difficulty of preserving participant anonymity when the project itself may have high visibility within the local community (see Walford, 2018), and the extent to which the participants are consulted at later stages of the research project with regard to how they and their practices are depicted (e.g., participant validation, also called member checking) – all of these tend to be augmented by the larger power differential frequently encountered when researching in the global South, particularly for Northern researchers.

5.2.3 Interpreting Data

The third area of challenge relates to how the researcher interprets what they see. On several occasions, I have emphasised the likelihood that, irrespective of our attempts as researchers to mitigate this influence, our personal perspective will always influence what we notice to some extent, and the greater the sociocultural differences between researcher and research context, the greater the danger of ethnocentrism. Even when we attempt to conduct inductive analysis of data, 'themes do not just "emerge"' (Braun & Clarke, 2006, p. 96; also Hammersley, 1992) – the researcher is an active agent in the data interpretation process. For this reason, researcher critical reflexivity is essential (Stenhouse, 1981). While most qualitative researchers are aware of this, quantitative researchers are generally much less so, and yet, because their research is also ultimately based on personal bias (the choice to study a certain phenomenon, operationalise a construct a certain way or pose a specific research question, for example), critical reflexivity is also necessary on their part (Bourdieu & Wacquant, 1992). Just like themes, hypotheses do not *just* emerge.

A further challenge more specific to teacher expertise studies occurs at a slightly later stage in the data analysis process, when the researcher begins to compare their findings, both within their sample, and to prior studies. Given the near absence of teacher expertise research in the global South to date, and the comparative lack of development of Southern theory in the applied social sciences (see Section 11.1), researchers need to make decisions regarding the extent to which they feel confident generating theory from their data, and then generalising that theory beyond the sample involved – these will also be influenced by the researcher's own interests and background. While it is common for researchers working in the particularising tradition (typically qualitative, small sample size) to discuss 'transferability' rather than generalisation (Lincoln & Guba, 1985), and it is necessary for researchers working in the generalising tradition (typically quantitative, large sample size) to extrapolate beyond their data to the wider population, a critical realist perspective would argue that in both cases, while caution is always necessary, some degree of generalisation is also always possible, even from a single case study (see Flyvbjerg, 2006).

5.3 STUDY REQUIREMENTS

Considering the challenges described above, a study of teacher expertise conducted in the global South needs to meet a number of what might be

called minimal requirements. Firstly, the researcher needs to be aware of their own background and the potential influence that this can have at every stage in the research process. Closely linked to this, the researcher may need to put in place specific mechanisms to reduce the possibility of their imposing exogenous (e.g., Northern) norms on the research process and presentation of findings. In the early stages of the study this danger manifests itself particularly during the participant recruitment stage, through the choice of inappropriate or insufficient criteria for designating someone an expert. In the later stages of the study, it manifests itself during data analysis and interpretation. The researcher also needs to attend carefully to numerous ethical concerns, highlighted in Section 5.2, relating to the researcher–participant relationship and participant rights concerning whether and how to participate. They should also remain sensitive to the vulnerabilities and concerns of other stakeholders (e.g., learners) often perceived as secondary or peripheral to the study.

All of these requirements, considered together, point to the need for several specific design elements in the study:

- an initial, systematic exploration of understandings of teacher quality in an appropriate community of practice within the research context to provide the researcher with endogenous perspectives on expertise;

- the adoption of a multiple criteria recruitment process to counter the potential that one or two such criteria may be problematic or unreliable;

- an equitable means for participants to participate in the study;

- the involvement of participants, as both co-decision makers on key aspects of the study design and outputs, and advisers on sociocultural norms and expectations, particularly during fieldwork;

- an approach to data analysis and presentation that is inductive and reflexive.

While these requirements indicate a clear need to modify some aspects of typical research procedure, they do not necessarily require the researcher to abandon their primary goals, which may be important ends in themselves, or to move towards approaches that make the possibility for generalisation of findings more difficult, as may happen in the case of fully participatory research projects. These needs can be balanced carefully along a cline or continuum of participation.

5.3.1 The Continuum of Participation

In the field of education, participatory research is primarily associated with approaches that are fully participatory, such as action research (see, e.g., Dikilitaş & Griffiths, 2017; Smith, 2015). Within such approaches, the teacher essentially becomes the researcher, and the research expert moves into a role of mentor or supervisor, handing over responsibility both for deciding upon the research focus and for conducting the majority of the work to the teacher. However, as writers from other fields, such as community development and planning, have observed, research can be participatory along a continuum. Arnstein's (1969) ladder of participation and Pretty's (1995) typology of participation are good examples of this. Both include several stages, from manipulation (least participatory) through consultation, then functional participation, to self-mobilisation or citizen control (most participatory). Considered in isolation from research objectives, both authors recommend the highest levels of participation possible. However, for certain types of research in which more typical roles of researcher and participant are required or preferred (e.g., phenomenological research, case study, etc.), projects can still benefit from being what might be called 'partially participatory', enabling us to balance between our aims as researchers and the needs, perspectives and preferences of teachers as more-empowered participants than they would otherwise be, with one important proviso, as Cornwall and Jewkes (1995) observe: There must, as a minimum, be meaningful interaction at the early design stage, when 'the most important distinctions centre on how and by whom is the research question formulated and by and for whom are research findings used [*sic*]' (p. 1668; also Bergold & Thomas, 2012). Such a partially participatory approach was adopted in the study design of my PhD project (see Anderson, 2022a).

5.4 AN EXAMPLE STUDY DESIGN SOLUTION

In this section, I briefly outline the design approach taken in my PhD study, conducted in 2019–2021 in India (Figure 5.1; see Anderson, 2021, for more detailed discussion). It offers one potential way of conducting a teacher expertise study that meets the requirements presented in Section 5.3 in most cases. Presenting it here as a completed study may convey the impression that it was designed first and then implemented. However, like all participatory approaches, the design was flexible, iterative and reflexive, with both small and occasionally large adaptations made at each stage, as Cornwall and Jewkes (1995) recommend.

Figure 5.1 **The design of the study**

Phase	PhD study	Participatory element
Preparatory phase ⇩	Conducted exploratory research with teachers in a relevant community (an Indian teacher association) to investigate their understandings of teacher quality.	
1. Theorising expertise ⇩	Developed theory and definition of teacher expertise. Appropriate criteria for recruiting participants for the main study were identified.	Equitable approach to participant recruitment was adopted.
2. Recruitment of participants ⇩	Participants were recruited through a call for expressions of interest via the Indian teacher association used in the preparatory phase, through self-evaluation of a range of criteria.	
3. Planning of study and outputs ⇩	One-day meeting was conducted with participants to plan the study (incl. study focus, research questions, approach, outputs, participant welfare).	Agreed on outcomes of interest to all participants (incl. co-authored book).
4. Data collection ⇩	Data collection tools were tailored to agreed focus. Initial pilot study led to minor modifications. Visits to remaining participants went largely to plan.	
5. Data analysis and writing ⇩	Data analysis for individual cases was conducted, including transcription, coding and analysis of data to build individual case descriptions.	Participants wrote chapters for co-authored book.
6. Comparative analysis and review ⇩	Cross-case comparison was conducted. Participant validation was conducted carefully over two phases.	Peer-review of each other's chapters.
7. Completion	Thesis completed.	Book published.

5.4.1 Preparatory Phase

Before beginning the main study, in order to build my own understanding of the study context and how expertise is understood and valued in this context, I conducted exploratory survey research (Anderson & Lightfoot, 2022) in an appropriate discourse community – a prominent teacher association for English language teachers called AINET.[2] Teachers in this community were invited to provide discursive written answers to several questions asking them to imagine an effective teacher's[3] lesson and persona via a qualitative questionnaire. Seventy-five written responses were coded inductively, and prominent themes were then brought together, also discursively, through a holistic situated description of the effective teacher of English (see Anderson, 2020d) that I anticipated would be useful, both in itself, and to inform the subsequent stages of the study.

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[2] www.theainet.net
[3] 'Effective' was chosen over 'expert' through consultation with the AINET management team.

5.4.2 Theorising Expertise

During this initial phase, I conducted a first iteration of the literature review documented in Chapters 2 and 3, leading to the context-sensitive, community-referenced definition of teacher expertise presented in Section 2.5. Keeping this definition in mind, I conducted a critical literature review of participant recruitment criteria used in earlier teacher expertise studies, beginning with Palmer et al.'s (2005) seminal work but also reviewing the many studies that have since been published. I rejected any criteria that were likely to be inappropriate, unavailable or unreliable in Southern contexts. For those criteria that were retained, indicators of expertise were identified and classified as (i) prerequisite; (ii) useful; (iii) potential indicator; and (iv) likely indicator. This analysis led to my developing a revised, more extensive set of participant selection criteria for expertise studies than Palmer et al.'s (2005) original indicators, which are discussed in detail and presented in Section 5.5, criteria that are likely to be usable in the widest possible range of contexts around the world.

5.4.3 Recruitment of Participants

Rather than relying on stakeholder nomination – a commonly used means to identify potential participants for teacher expertise studies (see Section 5.2.1 for potential shortcomings), I adopted a more equitable strategy at this stage. A call for participants was distributed through the AINET teacher association (also used in the preparatory phase). It disclosed all necessary background information on the study and presented potential recruitment criteria as identified in the previous phase, asking interested teachers to initially self-evaluate these through an expression of interest form, delivered electronically via the association's communication channels. All respondents who met prerequisite criteria – a current teaching position, basic qualified status and sufficient experience for expertise to develop (set at five years; Berliner, 2001a; Palmer et al., 2005) – and also met at least one potential indicator of expertise, were invited to video interview. During these interviews, teachers were able to get to know the researcher and ask questions so that both parties could make an informed decision concerning participation. I dealt with the delicate issue of requesting evidence for expertise criteria carefully during interviews, getting confirming at this stage if possible, and if not, requesting confirmation subsequently (e.g., *in situ*).

Of twenty expressions of interest received, thirteen teachers achieved inclusion criteria, and were invited to interview. Eleven of these responded,

and an interview was arranged. Two of these, it emerged during interview, could not guarantee stable teaching positions for the data collection period; the remaining nine could, and all met at least five potential indicators of expertise (see Table 5.1). While this was more than I had anticipated working with, I invited all to participate – by not excluding any that met minimum criteria, I was able to eliminate the danger of Pygmalion sampling. One of these nine had to drop out prior to data collection due to promotion to a headteacher position, leaving eight participants for the main study. Their profiles are presented in Table 5.1. By chance, they represented a wide range of contexts (two urban, two semi-urban, four rural), experience levels (7–25 years), a 50–50 balance of genders and even a range of personal backgrounds (e.g., class and religion). All worked in either government (4) or government-aided (4) schools (see Notes to Table 5.1). While five worked under the same state board, Maharashtra (likely due to the historical origins of the teacher association in this state), two were from Telangana, and one from West Bengal; thus, three different curricular contexts were represented.

5.4.4 Planning of Study and Outputs

Participant consultation occurred mainly during the early phases of the research design, through two meetings, the first online, and the second a one-day workshop in a central location, where we were able to explore our roles in the study, discuss and agree on its main focus and contingent research questions.[4] We also discussed other potential outputs, logistical issues and put in place mechanisms to guard against participant exploitation (including a meeting without me present for the participants to discuss this issue, the setting up of a WhatsApp group that also excluded me, and a representative who could express any concerns raised by participants to me). At each stage, during both meetings, I made my requirements transparent (e.g., that the PhD study necessarily had to be single-authored), but was also able to offer meaningful decision-making choices to participants concerning the research design, consistent with recommendations in the literature (e.g., Cornwall & Jewkes, 1995; see Section 5.3.1). For example, with regard to the study focus, five options were presented. The participants were encouraged to select one, without my intervention. After discussion, they chose the fifth:

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[4] Participant travel and accommodation costs were covered by research funding.

Table 5.1 Participant profiles and teaching contexts

Name[1]	Years teaching	Potential or likely expertise markers[2]	Grades taught	Context[3]	Learner SES[4]
Dipika	24	MA qualified; state teacher educator; TA participant; active CPD; national conference presenter.	8–10	Large, govt-aided school, urban Maharashtra	64% disadv.
Gajanan	20	MA qualified; district teacher educator; TA participant; active CPD; national conference presenter.	8–10	Small government-aided school, rural Maharashtra	78% disadv.
Kuheli	25	MA qualified; above average student achievement; state teacher educator; international scholarship award; TA participant; active CPD; international conference presenter.	7–11	West Bengal, urban; large government school	25% disadv.
Manjusha	25	MA qualified; above average student achievement; state teacher educator; curriculum advisor; TA participant; active CPD; national conference presenter.	8–12	Maharashtra, semi-urban; large government-aided school	84% disadv.
Nurjahan	7	MA qualified; state teacher educator; TA participant; active CPD; national conference presenter.	5–10	Maharashtra, semi-urban; large government-aided school	35% disadv.
Raju	13	MA qualified; state teacher educator; above average student achievement; TA participant; active CPD.	6–10	Telangana, rural; small government school	99% disadv.
Shekhar	11	MA qualified; state teacher educator; receipt of teacher awards; TA participant; active CPD; national conference presenter.	9–10	Maharashtra, rural; large government-aided school	99% disadv.
Vinay	16	MA qualified; international scholarship award; state teacher educator; TA participant; active CPD; national conference presenter.	7–10	Telangana, rural; small government school	99% disadv.

Notes. 1. Real names (not pseudonyms) were used (see 5.4.6). 2. See Table 5.3 for how these markers were identified and justified. 3. Both government and government-aided schools are free for students and non-selective in intake. 4. Socio-economic status: 'disadv.' = disadvantaged, based on official government designations for 'reservation' (Government of India, 2020).

1. Your cognition (i.e., your knowledge, beliefs and values)

2. Your practice only (i.e., planning and teaching)

3. Your practice and cognition (how your planning and teaching link to your beliefs, ideas and knowledge)

4. The lessons themselves (i.e., what happens in your lessons, comparing different things you do)

5. You as 'whole people' (an ethnographic focus; linking all the above to understand who you are, your background and why you do what you do)[5]

As well as contributing to the research questions (see Section 5.4.8), time was set aside to discuss other project outputs. The teachers decided to produce their own publication independently of my PhD study; while this was discussed extensively during the meeting, there was no final agreement on the exact nature and format of this publication at this stage, so they continued discussing it through our online messaging group (see below).

5.4.5 Data Collection

Prior to fieldwork, data collection instruments were designed or adapted to fit the agreed study focus. The first case study was conducted as a pilot, enabling me to make changes to instruments and procedure subsequently, if required (only minor changes were necessary). Participant teachers' recommendations were followed carefully throughout data collection, particularly regarding allowing time flexibility in each location to ensure that the unforeseen could be accommodated. The research group remained in contact via WhatsApp and video meetings. Thanks largely to the wisdom and guidance of these eight experts, data collection proceeded without significant difficulty and was consistent with guidance for comparative case study research in education (e.g., Bartlett & Vavrus, 2017; Stake, 2006). As we had agreed at the planning workshop, each participant retained a copy of data collected in their context (except data that was confidential), and had equal right to make use of it within ethical approval requirements. The total amount of data collected was significant, summarised in Table 5.2.

5.4.6 Data Analysis

Data analysis was conducted in two phases using a range of tools, some of which were planned (e.g., a reflective diary) and others emerged during the

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[5] This was the exact wording used.

Table 5.2 Statistics on data collected

Participant teacher order	Days spent at school	Participant teacher lessons observed	Participant teacher interviews	Interviews of other stakeholders	Observations of other teachers
1. Raju (pilot)	13	21	7	7	3
2. Vinay	21	32	10	6	5
3. Shekhar	20	27	10	4	9
4. Gajanan	21	38	10	6	7
5. Dipika	25	34	9	7	4
6. Nurjahan	21	32	7	5	4
7. Manjusha	20	30	7	4	4
8. Kuheli	24	28	7	5	4
Total	165	242	67	44	40

research process (e.g., a comparative spreadsheet). While I was aware that the themes and categories for data coding would always be influenced by my beliefs, as far as possible, I tried to counter this influence by the use of inductive coding and the understandings I had developed during the preliminary research (i.e., Indian teachers' theories of effective teaching; see Anderson, 2020d) to develop categories and structure the reporting of findings (see Anderson, 2021, for detailed discussion).

Two stages of respondent validation (member checking) were conducted during data analysis. After individual case analysis, I shared a detailed case description (>14,000 words) with each teacher, confirming that I would not include any data or findings that were not presented in this case description in the PhD or other future products of our partnership without further consultation. The second stage of validation happened much later – after cross-case analysis, I presented the two comparative findings chapters of the PhD study (similar to Chapters 7 and 8) in full to the participant teachers, so that each could also see how I was comparing their practice to their peers. Feedback was arranged through individualised channels, taking pains to ensure that these were as convenient to them as possible: several preferred to provide written feedback, and others to meet online to provide spoken feedback. Their feedback was incorporated transparently into the data presentation, and particularly with regard to sensitive issues (e.g., critical comments they may have made of policies, institutions or individuals), their recommendations were followed. Because this was a teacher expertise study, the findings

were generally positive, meaning that, in the vast majority of cases, the participant teachers were pleased with how the study represented them. In fact, most were more critical of their own practice than I was, and found the few critical reflections that I presented valuable. Only upon completion of this stage did I introduce the question of whether the participants wanted to be pseudonymous in the study or to be identified. All eight chose to be identified,[6] although efforts were made to ensure that no other individuals could be identified in specific data extracts or interview comments.

5.4.7 The Participant Teachers' Publication

Towards the end of data collection, I encouraged participants to set a timeline for drafting their shared publication. Since the planning meeting, through group discussions in WhatsApp, they have gradually converged on what they wanted to write – a co-authored book, with one chapter each, in which they described their contextual challenges, reflected on their personal theories as teachers and described their practice, also offering advice for newly qualified teachers who faced similar challenges to them. At this point I raised a personal concern – that I wanted to avoid becoming the editor for this book, so the participants agreed to peer-review each other's chapters. The book was subsequently published by AINET, the teacher association that had facilitated our collaboration (see Gode et al., 2021). This publication enables their voices to be heard independently of mine, serving as alternative, emic accounts of their expertise, as well as providing useful points of potential triangulation for findings presented in Chapters 6 to 8).

5.4.8 Research Questions

While most discussions of research methodology start with the research questions, I have chosen to present mine here, at the end of this overview of the study design. While I did have a broad aim for the study at its inception (to offer an account of teacher expertise in a Southern context), the approach and research questions only began to crystallise during the participatory workshop to ensure that the teachers were able to contribute to the study focus and design. Their choices (discussed above) dictated the more ethnographic approach adopted for the individual case studies. The research questions for the PhD thesis were subsequently finalised as follows, based on this focus, but also influenced by my interest in comparative case study:

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[6] Anonymity waivers were signed and added to ethical approval documentation.

1. What are the features of the pedagogic and professional practice, related cognition and beliefs of expert teachers working in Indian state-sponsored secondary education?

2. What commonalities and differences can be identified when comparing these features?

3. To what extent are the commonalities identified consistent with those of expert teachers in other researched contexts?

5.5 PARTICIPANT SELECTION CRITERIA FOR TEACHER EXPERTISE STUDIES

The only published systematic review of selection criteria used in teacher expertise studies to date was conducted by Douglas J. Palmer and colleagues (Palmer et al., 2005), although both Bucci (2003) and Tsui (2005) have published discursive articles on this topic. Since then, the teacher expertise literature has expanded considerably, becoming both more diverse in its subject focus and more international, particularly with regard to recent studies conducted in China. As part of my preliminary research, I reviewed this literature carefully, primarily to identify appropriate indicators for my study. However, given the considerable time since the work of Palmer's team, it is useful to offer an updated review of such selection criteria, presented here.

Palmer and colleagues analysed 27 peer-reviewed empirical studies on teacher expertise, identifying a wide range of strategies for participant selection, criticising some of these for being haphazard and unsystematic, and recommending the adoption of a 'two-gate identification procedure', with initial screening for experience and appropriate certification, followed by expertise indicators including personal nomination and impact on student performance (2005, p. 23). Some of the labels they used to categorise expertise criteria were idiosyncratic or opaque (e.g., mentoring roles were included under 'performance criteria' and higher qualifications under 'professional/social group membership'; p. 17); as a result, their categories have only sometimes been followed here.

Table 5.3 presents revised criteria, using transparent, descriptive labels, including example studies from the literature reviewed (based on 106 teacher expertise studies). It also offers critical commentary on each criterion, with consideration of diverse contexts worldwide, and proposes indicators for each criterion. These indicators are of four types:

1. Prerequisite: *Sine qua non* minimum criteria.

2. Useful: Not obligatory, but likely to indicate either expertise or commitment.

3. Potential indicator: May indicate expertise, but insufficient if used in isolation.

4. Likely indicator: Probably indicates expertise, depending on context.

While none of these criteria can be considered to be sufficiently reliable as evidence of expertise in isolation, when several are brought together, they are likely to indicate a teacher who possesses the context-specific competencies that are valued within an educational community as a source of appropriate practice for others to learn from, consistent with the definition of expertise provided in Chapter 2. As such, it is important to note that 'expert teachers' identified through these criteria are not necessarily the outstanding practitioners that achieve national or even international notoriety.[7] They are individuals who possess many of the desired competencies that we would like to see, and could realistically envisage in teachers across an educational system. In this sense, the participants of teacher expertise studies are not intended to be the 'best' teachers (however measured), and their practice is what we might call appropriate good practice, not 'best practice' – the latter implies only one way of being good, which is inconsonant with the findings of expertise studies and the ethos of the expert teacher prototype (see Chapters 2 and 3).

I propose that these criteria be used in flexible combination as much as possible, firstly to strengthen the likelihood that an expert practitioner has been identified, and secondly – in multiple-participant studies – to ensure that the expertise in its full and complex diversity (see Chapter 8) is suitably represented in the study sample (e.g., van der Mars et al., 1995). While the three prerequisites stipulated in Table 5.3 (interest in participation, qualified teaching status and sufficient experience for expertise to develop) are unlikely to be controversial, unlike Palmer et al. (2005), I have avoided proposing any specific indicators of expertise as *sine qua non* criteria here, given complex differences between contexts worldwide. However, it is recommended that researchers confirm the presence of at least two likely indicators or four potential indicators from Table 5.3. This differentiated approach is consistent with Sternberg and Horvath's (1995) expert teacher prototype, in which no attempt is made to prescribe 'necessary and sufficient features' of expertise. Instead, expertise is viewed as a 'fuzzy' affiliation, within which there may be 'family resemblance' only.

[7]   See, for example, the Global Teacher Prize: www.globalteacherprize.org

Table 5.3 Participant selection criteria for teacher expertise studies

Criterion	Example studies	Critical commentary	Indicators
Interest in participating in the study	Borko & Livingston, 1989; Hogan & Rabinowitz, 2009; Stahnke & Blomeke, 2021a.	An ethically important prerequisite for participation, yet often overlooked by researchers or assumed as unproblematic. Enthusiastic participants may be less likely to withdraw, and more willing to provide extensive data.	**Prerequisite**: Interest in participating. **Useful**: Enthusiastic about participating.
Sufficient experience	Caspari-Sadeghi & Konig, 2018; Ho & Liu, 2015; Kowalchuk, 1993; Krull et al., 2007; Li & Ni, 2009; Ortogero et al., 2017; Tochon & Munby, 1993.	Sources typically indicate that 5 years (Tsui, 2005; Palmer et al., 2005) or 5–7 years (Berliner, 2004; Tochon & Munby, 1993) of prior experience are necessary. Palmer et al. (2005) conclude that 5 years' full-time teaching should suffice for expertise to develop, and also recommend 3 years in their current context, following Berliner (1994).	**Prerequisite**: Over 5 years' full-time, 3 in current context. **Useful**: Over 7 years' full-time.
Qualification	Amrein-Beardsley, 2012; Bond et al., 2000; Graham, 2014; Hanusova et al., 2014; Hogan & Rabinowitz, 2009; Solmon & Lee, 1991; Tochon & Munby, 1993.	While qualified teaching status is an assumed prerequisite in most studies, Palmer et al. (2005, p. 22) problematise the term 'highly qualified', suggesting that qualification is a 'necessary but not sufficient' criterion. Solmon and Lee (1991) and Tochon and Munby (1993) considered Master's degrees a relevant expertise criterion. but this may be context-specific, thus judged a potential indicator only here. However, advanced qualifications which adopt appropriate assessment criteria, such as National Board Certification[1] in the US, constitute likely indicators, particularly when supported by empirical research (see Bond et al., 2000; Goodwyn, 2017).	**Prerequisite**: Qualified teaching status in the context in question. **Potential indicator:** Master's degree in relevant subject. **Likely indicator:** Contextually appropriate advanced in-service qualification.
Receipt of teaching awards	Agne, 1992; Azal & Harun, 2020; Chen & Ding, 2018; Copeland et al., 1994; Standley & Madsen, 1991; Swanson et al., 1990; Turner-Bisset, 2001; Wang & Ye, 2020; Westerman, 1991; Yang, 2014.	Increasingly common as a criterion. Much cultural variation, including teaching competitions in China (e.g., Yang, 2014). Tsui (2005) discusses teaching awards critically, noting that criteria should be independently assessed. International scholarship award criteria (e.g., Fulbright Scholarships) are often well designed and carefully vetted, but likely to be biased to criteria of awarding country. Thus, considered a potential indicator only.	**Potential indicator:** Regional, association or national teaching award. Scholarship award.
Student performance-based criteria	Akyuz, 2010; Ayres et al., 2004; Hatch, 2015; Leinhardt & Greeno, 1986; Livingston & Borko, 1990; Pepin et al., 2017; Silberstein & Tamir, 1991; Toraskar, 2015.	Palmer et al. (2005) argue that this 'should be the *sine qua non* of teaching expertise' (p. 22) yet acknowledge significant challenges in isolating teacher value-added impact, as discussed in the wider literature (see 2.3). While valued in many national contexts (e.g., China, India), exam scores may lack validity and reliability (e.g., Gandhi Kingdon, 2007), thus can only be considered a potential indicator.	**Potential indicator:** Evidence of student exam results higher than average among comparable peers.

Table 5.3 (cont.)

Criterion	Example studies	Critical commentary	Indicators
Stakeholder nomination (e.g., headteacher, school inspector, district board)	Allen & Casbergue, 1997; Bucci, 1999; Conners, 2008; Ethell & McMeniman, 2000; Gross, 2014; Hanusova et al., 2014; Toraskar, 2015; Yuan & Zhang, 2020.	Among the most commonly used criteria. Palmer et al. (2005) note that 15 of their 27 studies used nomination by school administrators (esp. principals), or district boards, mainly in USA. Olson (1992, cited in Tsui, 2005) notes that criteria used by such personnel are not always clear. Problematic in contexts where headteacher and district inspector lesson observations are rare (e.g., Toraskar, 2015); such stakeholders may not be well informed. Peer nomination by teachers may be more idiosyncratic.	**Potential indicator:** Nomination by informed stakeholder with sufficient expertise.
Teacher educator experience	Arani, 2017; Goodwyn, 2011; Hughes, 2021; Kowalchuk, 1993; Li & Zou, 2017; Meyer, 2004; Stahnke & Blomeke, 2021b; Swanson et al., 1990; Vogler et al., 1992; Wolff et al., 2015.	Including teacher trainer and mentor. Increasing as a criterion. Potentially more reliable than some social recognition indicators (e.g. stakeholder nomination) given that teacher educators will likely both have been selected for their expertise locally, and further assessed during teacher education work. Important to ensure that this is alongside a practising teaching position (Wolff et al., 2015), rather than as a full-time role.	**Likely indicator:** Evidence of recent experience in teacher educator role (e.g., as mentor in own school, teacher trainer on reform initiatives) but only alongside practising teaching position.
Leadership role	Cravens & Wang, 2017; Hayden et al., 2020; Krull et al., 2007; Lam, 2009; Land & Drake, 2014; Li & Kaiser, 2011.	May include departmental heads (e.g., Lam, 2009), senior teachers (Li & Kaiser, 2011) or district leaders (e.g., Cravens & Wang, 2017). Often discussed alongside other roles of responsibility (e.g., mentor, curriculum advisor). Like teacher educator, such roles require local recognition, although this may be for qualities not directly related to their teaching expertise, thus potential indicator only.	**Potential indicator:** Evidence of officially designated leadership role within school or district.
Conference presentation or publication experience	Kowalchuk, 1993; Lawrie et al., 2019; Li et al., 2011; van der Mars et al., 1995; Vogler et al., 1992; Wang, 2018; You, 2009.	Vogler et al. (1992) considered prior presentation of papers at 'conferences/inservices' one of several indicative criteria, thus a potential indicator if occasional. Regular experience of presenting at high-level (e.g., national) conferences or contributing to practitioner and academic publications would indicate both social recognition and evidence of active engagement with discourse community, thus a likely indicator.	**Potential indicators:** Experience presenting at conferences or of publication. **Likely indicator:** Multiple publications or high-level conference presentations.
Professional group affiliation (e.g., teacher association; research group)	Gay, 2012; Sarda et al., 2014; Vogler et al., 1992.	Comparatively rare as a criterion.[2] While being a member of a teacher association or research group alone is unlikely to indicate expertise, active participation (e.g., resource person, committee member) or senior role in such a group may do.	**Potential indicator:** Evidence of active participation in teacher association.

Table 5.3 (cont.)

Criterion	Example studies	Critical commentary	Indicators
Evidence of active CPD	Bevins, 2002; Lauterbach et al., 2020; Patterson, 2014; Rollett, 2001.	Comparatively rare as a criterion. While participation in mandatory CPD events is not sufficient as an indicator, evidence of active (i.e., self-initiated and sustained) CPD may be. Rollett (2001) saw 'continued participation in various higher-level teacher training seminars' as a cross-culturally viable criterion.	**Potential indicator:** Evidence of recent voluntary participation in conferences, workshops, CPD programs, etc.
Researcher selection based on classroom observation	Bromme & Steinbring, 1994; Carter et al., 1987; Geary & Groer, 1994; Land & Drake, 2014; Moallem, 1998; Solmon & Lee, 1991.	Inherently problematic for case study due to danger of Pygmalion sampling: participants chosen on classroom-based criteria will always confirm the importance of those criteria. Cannot be used for exploratory studies, particularly cross-culturally, where *a priori* assumptions regarding nature of expert teaching practice should be avoided.	**Not recommended.**
Researcher screening	Crawford et al., 2005; Sabers et al., 1991; Webb et al., 1997.	This has happened in a number of ways, including discussion with nominators (e.g., Webb et al., 1997) or use of questionnaires (e.g., Crawford et al., 2005). Potentially useful as a second stage of selection, although may lead to cherry-picking of participants. May be useful in a cross-cultural study, providing screening avoids evaluation of classroom practice.	**Useful:** Participation in screening may signal commitment and provide opportunities for both parties to make informed decisions.

Notes: [1] www.nbpts.org.
[2]Palmer et al.'s (2005) use of 'Professional/Social group membership' was wider, including teacher educators and qualification graduates.

5.6 CONCLUSION

This chapter has investigated a number of key methodological challenges presented by teacher expertise studies, focusing particularly on those that may be more important in Southern contexts. It has also summarised both the design problems and procedure adopted for my own PhD study in India (Anderson, 2021). In making clear my rationale for the procedures I adopted, I hope that this chapter also offers useful, practical guidance to researchers interested either in conducting teacher expertise studies in contexts (either national or subject-related) where there is little prior research or in offering greater equity and voice to participants than often occurs in researcher-led studies, particularly in the global South. In this regard, it is important to note

that the procedure outlined above does not offer a 'blueprint' for achieving either intention. Each researcher should identify their own research problems and appropriate solutions that work together effectively. To provide an example of this, it was relatively easy to make this study participatory and the participants non-pseudonymous precisely because it is a study of teacher expertise, the findings of which are likely to be, in the main, positive and complementary towards the teachers involved. However, Traianou (2007) offers a very different account of the challenges faced in her expertise study (2006), which I would also recommend as useful reading to anybody considering conducting a teacher expertise case study.

The chapter has also presented the findings of a detailed review of participant selection criteria for teacher expertise studies that may be useful to other researchers. Because this review adopts a critical perspective, cognisant of the problems that researchers face when attempting to identify experts in more challenging contexts, I would argue that the recommendations for identifying participants made above (i.e., to adopt multiple, yet flexible selection criteria) are potentially implementable in a much wider range of contexts than Palmer et al.'s (2005) recommendations. This multiple criteria approach is also consistent with both Sternberg and Horvath's (1995) and my own discussion of the expert teacher prototype.

Chapters 6, 7 and 8 present key findings from my PhD study project. One chapter each is devoted to exploring first the similarities (Chapter 7) and then the differences (Chapter 8) found in the pedagogic practices, cognition and professionalism of the eight expert teachers involved; both of these chapters necessarily need to do this comparatively, meaning that they are unable to offer the 'thick', detailed contextualised description of each teacher and their context that many of us value in our quest to understand a phenomenon of interest. To counter this comparative tendency, the next chapter (Chapter 6) offers a detailed, contextualised, single portrait of teacher expertise; for interested parties, the PhD study itself offers three such portraits (Anderson, 2021).

6   A Portrait of Teacher Expertise

There is no perfect teaching method in the world. Every teacher has to design his/her own method considering the students.[1]

—*Bapu Pokharankar (Teacher educator)*

This chapter provides a detailed account of the context, background, cognition and practice of one of the participant teachers in the study, including sufficient extracts from lessons and interviews to constitute a situated 'thick description' of the type typically recommended in qualitative research (e.g., Miles & Huberman, 1994; Tracy, 2010). While the participant in question should not be seen as representative of the group as a whole (each was unique), she was found to share a large number of features of practice, cognition and professionalism with the other participant teachers. The challenges she faced were in part specific to her personal history and career path and in part resulted from her context of work and her learners' backgrounds; as a result, many of these challenges were also shared by the other participant teachers (see Chapter 7). As such, this portrait offers a useful, situated insight into the nature of teacher expertise in Indian secondary education.

6.1   INTRODUCTION: CONTEXT AND CHALLENGES

Nurjahan[2] works in a large, government-aided secondary school in a small coastal town in Maharashtra, central India. The school enjoys a good

[1]   This epigraph, chosen by Nurjahan, is a quote from one of her B.Ed. teacher educators.
[2]   Not a pseudonym. Nurjahan Naik Khwaja, like all the teachers in this study, chose to be identified after extensive participant validation. All other (student) names in this chapter are pseudonyms.

reputation in the local community, providing both Marathi-medium and semi-English-medium education,[3] the latter only in the higher-achieving classes within the streaming system used in the school. Common professions among learners' parents include fishing, retail, casual labour and farming, with a small but increasing number also working in the burgeoning tourism industry. The school is well equipped, with a staffed library, functioning laboratories and computer rooms, and several classes with functioning data projectors. All subjects follow Maharashtra State Board Curriculum.

While the school also includes primary grades, new learners also join at secondary grades from other schools, especially at Grade 9, and vary in their prior academic attainment. Some have studied English in Marathi-medium classes (where English is typically taught only as a written language through Marathi) and others in English-medium, meaning that they vary greatly in their English proficiency profiles, particularly speaking and listening skills. Her observed class sizes averaged forty-three students. Approximately 35% of her learners are from disadvantaged backgrounds, and most speak Malvani at home, a language only partly intelligible with Marathi, the official language of the state, although Marathi is also commonly used in the local community.

During the time of my visit, Nurjahan was teaching English to classes 5A (primary), 8C, 9C and 10C (secondary) in a streaming system where 'A' is the highest performing class and 'C' the lowest at each grade. Decisions regarding who teaches which classes are made by senior staff, who often assign themselves secondary classes within the A and B streams. Since Nurjahan was a comparatively recent arrival, she taught mainly 'C' classes. As I was walking to my first observation of her lessons, I met another teacher, who upon hearing the class name 8C remarked: 'Oh, the naughty class!'.

Nurjahan, like all of the teachers in this study, works in state-sponsored, non-selective education, teaching learners from a broad cross section of the local community. While several other participant teachers were found to have higher percentages of officially disadvantaged learners in their classrooms, her greatest challenges originated in the comparative disadvantage of her learners being in the lowest stream of the school, reflecting both the individual difficulties that these learners had to contend with (e.g., familial, social, behavioural and developmental) and the social 'labelling' that resulted (e.g., as 'naughty'), as well as the inevitable impacts of these challenges on self-esteem and motivation that they experienced as growing teenagers. Other

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[3] In semi-English-medium education in India, some content subjects only (typically maths and science) are taught through English-medium instruction.

challenges of importance included large class sizes (higher than average for India) – meaning her classrooms were often crowded and off-task behaviour was more likely – and her learners' varied prior attainment in English, which frequently necessitated differentiated instruction.

6.2 PERSONAL BACKGROUND

Nurjahan was raised 'as an only child' by her maternal grandparents (her parents and sister lived in a different town) within a family of teachers. While some Muslim families did not consider education of female offspring a priority at that time (the 1990s), hers did:

> Thankfully, from both my paternal side and my maternal side … girls are considered very special in our family so there was nothing like giving only some limited education and all. In fact we were given every kind of freedom we needed, and our family wanted us to learn.

Her maternal uncle was the principal of the local high school and was keen on ensuring she developed her knowledge beyond the school curriculum:

> He has always told me, don't go only for the [text]book, go for extra reading. And today also he keeps telling me, read these books, watch that film or keep trying to gain more knowledge.

Nurjahan did well at school, taking part in competitions and debates, and winning prizes. Her family expected her to become a 'professor', and she remembers role-playing being a teacher and pretending that her grandparents or even the family pets were her students. After harbouring brief ambitions to be a lawyer, she completed first a Bachelor's, then a Master's degree, both in English literature, and, after a brief spell teaching locally, she enrolled on a Bachelor's in Education (B.Ed.), recalling a sense of fate in her career choice:

> maybe because my family was also telling me, and there was some intrinsic passion in me, of my childhood that I used to teach a lot … so somehow that feeling became prominent and my family supported me. Actually I can say that it was my family's dream, as well.

Her B.Ed. was her first experience of studying away from home. She quickly developed a degree of autonomy in her approach to her studies:

> …during these years I developed my own style of study, having my own notes and all, reading reference materials and then taking down my notes.

She describes it as 'an amazing year', and received the trophy for 'best student teacher'. While she experienced some gender prejudice in her attempts to find work, her B.Ed. professor helped her to secure an interview for a position in her current school, where she was selected out of forty applicants after a demonstration lesson. She soon began attending teacher training workshops, and three years later she was chosen to become a trainer on a British Council project, since when her career as a teacher educator has developed rapidly (see Section 6.10). She had been at the school for eight years at the time of my visit.

Thus, while it was not true of all the participant teachers in this study, Nurjahan's career destiny seems to have been mapped out from an early age – becoming a teacher was both her 'family's dream' and her own.

6.3 KEY BELIEFS ABOUT TEACHING AND LEARNING

6.3.1 Building Learners' Self-Esteem

Nurjahan sees her learners' backgrounds as the 'biggest challenge' she faces, especially their parents, who may exert a range of 'burdens' on their offspring:

> [the learners] carry many pressures, they have many burdens, and there are many issues that they sometimes cannot express very well … but many times I've seen that when we try to talk to them, when we share a helping hand, that is, we are there for you, it makes a big change.

As a result, she believed strongly in the importance of developing their self-esteem:

> If I value myself, then I'll see what's good inside me. If I learn to hate myself, if teachers are giving impression that I am bad at studies, so I can't become anything in my life, so I will have only negative qualities.

This was particularly important given that many of her C-stream learners were used to failure, and negative reinforcement, even from their own parents:

> I had a girl who used to cut her hands, and I asked her why? So she said because my parents keep telling me: 'It's better that you die. You are a trouble for us.' So she was getting a feeling that she is of no use to anybody.

She felt strongly that issues of labelling and perception were to blame here, noting 'we shouldn't label them as slow learners', and adding 'we don't

believe in their strengths. We always think that unless we teach them they cannot learn, but that's not true'.

6.3.2 Raising Them Up

Nurjahan's belief in developing learners' self-esteem linked closely to her conviction in the importance of tailoring learning to their ability level, preferences and prior knowledge to build confidence and 'raise them up', despite their challenges:

> We have to come down to the learners' level … we have to consider their preferences. Suppose that the things we are teaching them are too hard, then we have to make them easier for them to understand, relating it to their lives, using examples from their lives, but at the same time, I think, sticking all the time to their level isn't a good idea, we also have to try to raise them up.

However, the strong exam focus in her school ('the rat race', she called it on one occasion) made this difficult, putting pressure on teachers to complete the syllabus early and begin exam preparation, thereby 'kill[ing] their creativity'. Despite her intention to nurture this creativity, she herself was also constrained by – and evaluated through – this narrow exam focus:

> Instead of considering your values, directly the progress in exams will be considered, but the changes you are trying to bring in students, nobody will look at that.

6.3.3 Developing Life Skills and Learner Autonomy

In contrast to this narrow academic focus at her school (and common across India), Nurjahan believed in developing skills that would serve her learners for the rest of their lives, trying hard to make them see beyond the examinations and the curriculum, to raise awareness of the wider opportunities that English literacy may bring, echoing the advice her uncle had given her as a child:

> I keep telling my learners also that our aim is not only this textbook, but I want to make you able to read and understand so that in the later life also you will be able readers.

The pathway to this goal, she believed, was through 'giving them autonomy' and making them 'independent thinkers', both in their academic studies and future lives. Having been raised largely as an 'only child', she had learnt to study independently as a young adult – a likely influence on her strong beliefs in both building self-esteem and developing learner autonomy.

6.4 INTERPERSONAL PRACTICES

Central to Nurjahan's teaching were her interpersonal practices: the closely linked relationships and behaviour management strategies that she cultivated and employed, respectively. As a result, the so-called 'naughty class' appeared focused and mature in her lessons, able to participate and interact well during both whole-class and collaborative learning, especially when compared to other lessons I observed in the C stream.

6.4.1 Relationships

Nurjahan's close relationship with her learners was a central feature of her practice; 'love from my kids' was specified on two occasions when asked about her motivation. She saw these relationships as central to developing their self-esteem:

> We need to have a strong emotional bond with our learners. That way, they will learn to respect themselves and try to become a good person.

She frequently stressed the importance of 'knowing' learners as individuals in order to develop meaningful relationships with them, regularly using the first names of her 190 learners, and noting that this helps them to 'feel that the teacher loves them or cares for them'. Consistent with her belief in positive reinforcement, praise was observed regularly in every lesson, both for individuals and the whole class, often with specific foci:

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EXTRACT 6.1: Nurjahan, Grade 5

T: Yeah, if there is no pollution. Good one. Very nice
answers! OK. Can we move to the next activity? Your
answers were superb! Very good. I'm really happy with
it. Now come to page fifty-six.⁴
```

She built confidence among weaker learners by spotting their correct answers while monitoring and then encouraging them to contribute during whole-class feedback:

```
EXTRACT 6.2: Nurjahan, Grade 8

T: Yash has got the exact answer. Can you read, Yash?
```

⁴ Unless otherwise indicated, the use of italics in extracts indicates phrases, words or morphemes (languaging resources) that were originally uttered in languages other than English (Marathi in this chapter) and are here translated into English (see Section 6.5).

She also promoted learner self-belief through the anecdotes and stories she told in class, on one occasion using the perseverance of weeds in the school playground as a metaphor for opportunity:

EXTRACT 6.3: Nurjahan, Grade 10

T: *I mean, if plants can grow in the rocks, what can happen? Everything can be achieved. Right?*

Her rapport with the learners was kind and sensitive, enabling her to pick up on both individual and class moods, and respond to them interactively. Regular humorous moments also punctuated her lessons. Jokes focused on language play, lesson content and local news, but not on learners' personal errors or difficulties. It was notable that, during separate focus group discussions that I conducted with her learners, four of the groups from her home class mentioned a sense of humour as the most important attribute of a 'good teacher', two of them also naming Nurjahan, even though they were asked not to mention individual teachers:

> My favourite teacher is Naik Madam. She is very joking teacher. (student focus group data)

6.4.2 Behaviour Management

Observations of colleagues in Nurjahan's school indicated that those who taught classes in the C stream encountered more behaviour management challenges than those who taught A and B streams. Several of her learners displayed the features of undiagnosed learning difficulties (e.g., attention deficit disorders), but there was also, on average, a higher likelihood of off-task behaviour, particularly among male learners. Her approach to dealing with these challenges was consistent with her belief in building self-esteem, frequently involving patient, one-to-one dialogue and additional pastoral support rather than reprimand in front of peers, justified convincingly on one occasion:

> If I punish them bitterly, what impact will it have on their lives? … I decided there should be some balancing point in that … and I found that if you try to have a word with them, if you try to make them think over that, or if you try to converse with them, then definitely there is another way out.

Nurjahan's effective behaviour management strategies were most apparent in her 8C 'home class', with whom she started each day. She was able to implement three specific strategies to help calm her learners and increase

Figure 6.1 Students meditating at the start of the day (Grade 8)
Note. benches of girls and boys are alternated across the class.

Figure 6.2 Nurjahan's checkerboard seating pattern
Note. White indicates desk of girls, grey boys. L = lower-achieving learner,
H = higher-achieving learner.

L H L	H L H	L H L	L H L
L H L	H L H	H L	H L H
L H	L H L	L H L	H L

application: her use of meditation, a mixed-ability seating plan and home-work monitors. Meditation happened first thing each day – just after the mandatory national anthem and prayer – inspired by a workshop she had attended on mindfulness (see Figure 6.1).

Her seating plan (see Figures 6.1 and 6.2) involved placing alternate desks of girls and boys in a checkerboard pattern across the class (in rural secondary schools in India, girls and boys normally self-segregate to different sides of the room). At each desk, she would either sit a less able or more disruptive learner between two more able ones, or a more able learner in the centre of two less able ones – mirroring recommendations in cooperative learning literature (e.g., Kagan & Kagan, 2009). This strategy both reduced challenges caused by disruptive learners congregating together and also encouraged peer tuition.

She used homework monitors (in rotating roles) to ensure completion of homework before she arrived in class each morning. As well as reducing lesson time spent on homework, this strategy also gave her learners responsibility (consistent with her belief in learner autonomy) and encouraged peer regulation (also a cooperative learning strategy).

Off-task and disruptive behaviour were observed more in her other secondary classes (9C, 10C), where she had less control of seating or daily procedures. She usually dealt with such incidents swiftly, able to 'anticipate and prevent disturbances from occurring' (Hattie, 2003, p. 7), through her use of regular individualised reminders (notice the frequent use of names below) as well as encouragement and positive reinforcement for appropriate behaviour:

EXTRACT 6.4: Nurjahan, Grade 8

T: Anybody from this group only has to read. Ah, Kamil cannot read, Kamil has read the answer yesterday. Come on Sagar, everybody listen to Sagar. Come on! Sh-sh-sh. (quietening class) Quickly. See others have made efforts, so it's your time now. *Hurry up* Sagar. (laughter can be heard) Behave yourself, Omkar … OK everybody listen to Papu, last answer.

S1: We will try to send him to a better place where he can sing. That is all I wrote.

T: Sh-sh, Arun? So this group says that we will try to send him to a good place, where he can sing and earn money, instead of begging. *Rather than begging, to send him to a place where he can fill his stomach by singing, he does not need to beg.* He can sing at a good place, OK. So very nice answers, very good efforts, good.

Individuals who regularly engaged in off-task behaviour received more personalised attention. She was careful to avoid humiliating such learners in front of classmates, and – consistent with her belief – she used private discussions to deal with more serious misdemeanours. She also differentiated in her approach to behaviour management. On one occasion, a boy who appeared to suffer from an attention deficit disorder arrived forty-five minutes late for a lesson. Nurjahan paused her teaching and said with only minor reproach in her voice as he passed to his seat: 'It's been an hour.' After class, she admitted that she often made specific concessions for this boy.

She also interacted with parents regularly (observed on three occasions during three weeks). On one occasion, I noticed her capitalise on a chance visit of a mother to the school for a different reason to quickly arrange a meeting with her.

Thus, it can be seen that Nurjahan's relationships with her learners and her behaviour management were inextricably related. The rapport and trust she developed, particularly in her home class, meant that off-task behaviour – often more frequent at the start of lessons – gradually diminished as she gained their confidence and cultivated their engagement. Only one occasion was observed in thirty-two observations when she felt the need to provide a warning of more serious sanctions to two boys (a possible visit to the school principal after class).

6.5   LANGUAGING PRACTICES

Indian schools, consistent with wider Indian society, are typically multilingual spaces where different languages are blended and meshed translingually (Anderson & Lightfoot, 2021). While some teachers of English or Hindi forbid the use of other languages in their classrooms, Nurjahan allowed and sometimes encouraged the use of other languages, also using Marathi herself at times. Her languaging practices[5] were therefore complex, multilingual and inclusive of her learners' languages. To illustrate this, extracts in this section include both original (Marathi and English) utterances and translations, displayed in two columns.

6.5.1 Nurjahan's Own Languaging Practice

Nurjahan used mainly English in class (76% of all language use in transcribed lessons). She used it for the majority of instructions, classroom language and behaviour management, although she noted 'many times I monitor and simplify it' to increase understanding for her learners. While she could speak Malvani (the first language of most pupils), she used Marathi, the medium of instruction of most of her classes, as the default alternative to English when required; its use fluctuated depending on the lesson or activity type (varying from 16% to 42% in transcribed lessons):

JA: When do you use more Marathi?

---

[5] The term 'languaging practices' is used in this book to denote the complex, situated ways in which language 'choice' – which was often instinctual among participant teachers (see below) – and use were inextricably intertwined (see, e.g., Thibault, 2017).

> N: It depends upon the class … suppose that it is an explanation lesson, then I have to use Marathi because they don't understand each and everything in English.

In her home class, pastoral issues were usually managed in Marathi; she signalled the start of the lesson with an abrupt switch to English. However, she also often used Marathi to reinforce something she had said in English, especially when asking questions, working with texts or giving instructions:

EXTRACT 6.5: Nurjahan, Grade 10[6]	
T: Yes, *shista* and what do we call that in English? *Shista la inglisa madhye kaya mhanatata?* It starts with 'D'?	T: Yes, *discipline* and what do we call that in English? *What is discipline called in English?* It starts with 'D'?
S1: Discipline.	S1: Discipline.

Marathi was also often used to translate, or elicit translations of English lexical items (e.g., when pre-teaching vocabulary before reading tasks), and was frequently used when teaching grammar, for example, to explain the role of adverbs or conjunctions, and occasionally in translation exercises:

EXTRACT 6.6: Nurjahan, Grade 5	
T: …what does it mean in Marathi? Raise your hands to answer: 'How nice it will be.' Gauresh, pay attention, please. Vedant?	T: …what does it mean in Marathi? Raise your hands to answer: 'How nice it will be.' Gauresh, pay attention, please. Vedant?
S1: *He kiti chana hoila.*	S1: *How nice it will be.*
T: *He kiti chana hoila.*	T: *How nice it will be.*

Translanguaging[7] was also common, sometimes involving the use of new or low-frequency English lexical items from the text (e.g., 'heel' and 'poisoned arrow' in Extract 6.7) within a lexicogrammatical matrix that involved primarily Marathi:

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[6]   Lesson extracts analysed under this section (languaging practices) include two columns to show all languages used (left column) and English only version (right column). In both columns, resources from languages other than English (usually Marathi for Nurjahan) are written in italics.

[7]   The fluid integration of resources from two or more named languages (Anderson, 2018b).

EXTRACT 6.7: Nurjahan, Grade 9	
Achilles *shariracha, ekch bhag tyachi* heel *ha ughada hota, jithe tyala jakhami karta yet hota. Ani tithech* poisoned arrow *lagla ani tyacha mrutyu zala.*	*The only part of* Achilles's *body that was exposed was his* heel*, where he could be injured. And there a* poisoned arrow *struck and he died.*

While she was aware of it, Nurjahan felt that her translanguaging was an instinctual process, rather than a premediated act:

> It happens naturally, I'll say. Because I'm quite used to using, switching languages, so for example when I'm speaking in Marathi or in Hindi, then I also use many English words…

When she monitored learner seatwork her language choices also seemed to be differentiated, using more Marathi for less English-proficient learners (e.g., Gautam) and less for more English-proficient students (e.g., Aish), as in Extract 6.8:

EXTRACT 6.8: Nurjahan, Grade 9	
Aish done? OK. Show me. Yes. (then to his neighbour) *Gautam, tithe nahi shodhaych. Shevatche tin* paragraph *mhanelela. Sevatacya* paragraph *madhye uttar ahe ani ata tu laksa nahi dila apan bolatana.* Aish, help him please. Don't give your answers. Try, show him where to find. *Kuthe shodhaych te dakhav tyala.*	Aish done? OK. Show me. Yes. (then to his neighbour) *Gautam, it's not to be found there. I said the last three* paragraphs. *The answer is in the last* paragraph*, you were not paying attention while we were talking.* Aish, help him please. Don't give your answers. Try, show him where to find. *Show him where to find.*

6.5.2 Nurjahan's Learners' Languaging Practices

Nurjahan's learners were encouraged to respond in any language; participation was more important than language choice per se. She noted that many had a 'phobia' of speaking English that prevented them from contributing to lessons:

> There is a kind of feeling that if I speak in English, others will laugh at me. Sometimes students tease each other … So these things prohibit them from expressing freely in English … if I say you have to talk in English, then nobody will dare. But, OK, you are free to use Marathi … then it becomes at least they are active in the class, at least they try to get up and share what they feel.

During group and pairwork, learners were free to use whatever languaging resources they preferred, and they regularly translanguaged. While most learner contributions during whole-class interaction were in English, she also allowed them to present answers on more complex discussion questions in any language.

The above analysis demonstrates that languaging practices in Nurjahan's classroom community were complex, mirroring those found in Indian society at large. Closely linked to her belief in confidence building, her practices were multilingually inclusive, prioritising participation over language choice requirements, leading to a more communicative environment than the stilted, impoverished interaction observed in the classrooms of peers who insisted on 'English only' in English lessons.

6.6 CURRICULUM COVERAGE AND PLANNING

6.6.1 Curriculum Coverage and Materials Choice

State-mandated textbooks constitute the *de facto* curriculum across India, also dominating classroom practice and exam content (Kumar, 2005; Padwad & Dixit, 2018). Thus, as for many of her peers, Nurjahan's lessons were dominated by use of the textbook. She moved systematically through each unit, covering the texts in detail and also the majority of exercises. Only a few lessons included grammatical foci that were not derived directly from the textbook but nonetheless involved content that was typically tested in examinations.

When I visited her, towards the end of the second trimester, Nurjahan and her colleagues were already under pressure (including from learners in Grade 10) to finish the textbook in order to leave the final trimester for exam preparation. Despite this pressure, and in contrast to typical accounts of pedagogic practice in India (e.g., Bhattacharya, 2013; Padwad & Dixit, 2018), Nurjahan consistently revealed an awareness of the importance of ensuring learner understanding before moving on: 'I don't think one lesson is enough for them to deal with that [text]'. One area where she usually replaced textbook content concerned text comprehension activities, which she tailored to learners' ability level (discussed further below).

Figure 6.3 Nurjahan's planning notes and textbook annotations
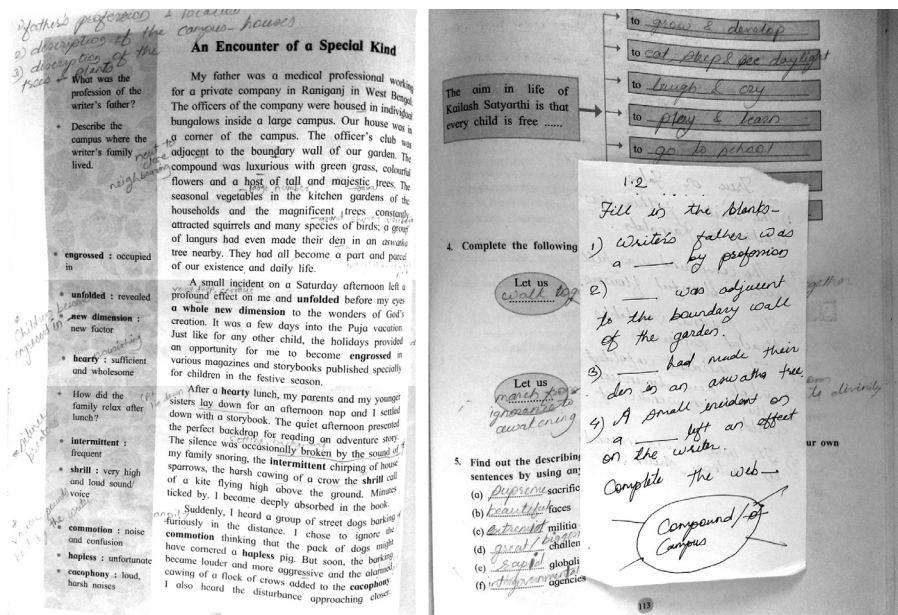
Nurjahan did not make much use of supplementary learning materials, preferring to use the board as a resource for provision of alternative activities, exercises and games. Example games included 'Back to the board' and 'Slap the board', which she had learnt in training workshops.

6.6.2 Planning

Nurjahan's lesson planning was primarily a mental process, in which she thought through a section of the textbook (the 'lesson') and asked herself a number of questions about it relative to the ability level and needs of the learners:

JA: How do you plan your teaching?

N: I look at the lesson, and I see: Is it too difficult, too simple? How can I teach it? Is it necessary to explain the things? Is it necessary to go for interpretation? Or if I have to, then which examples can I use, or what easy ways can I use to make that hard text easier for them?

She sometimes – not always – made notes, especially of supplementary comprehension questions or tasks, either annotating the coursebook, or using separate slips of paper (see Figure 6.3). These supplementary text

comprehension tasks were observed to be carefully scaffolded, gradually increasing in degree of challenge:

> …using the information I gave in one activity, on the basis of what learners did in that, I use that process to take them towards more complex ones. For example if you had noticed, for today's true or false activity, I used the information they have done in previous activities, and also based on that information, one, two and three activity, I planned the fourth activity.

As for many teachers in India, the unpredictability of the working day sometimes impacted on Nurjahan's ability to plan. There were occasions when, at short notice, she was asked to teach very different timetables to what she had expected upon arriving at the school in the morning, including on one occasion a triple period with no opportunity for preparation, the challenges of which she reflected on afterwards, somewhat critically:

> It went well, I can't say it was very good, or it was very boring. It was in the middle somewhere, because I, on the spot, came to know that I had to engage two periods, or three periods, so it was something like, I was hoping for a break after the first period, and so I could have got some more time for other preparations, but I didn't get it.

6.7 CLASSROOM PRACTICE

6.7.1 Lesson Structure

A notable feature of Nurjahan's lessons was the inclusion of frequent reviews and regular signposting to guide and consolidate learning. At the start of lessons, as well as checking answers to homework tasks, she would frequently conduct reviews of prior learning, for example, through the use of whole-class questioning:

EXTRACT 6.9: Nurjahan, Grade 8

T: Before we move to the next part, can we have a quick revision of the text? *Shall I ask you a few questions in this area?* Are you ready? OK. My first question is: how many characters are there in the story?

SS: Three.

T: OK, can you raise your hands if you want to answer? Jagdish.

S1: Three.

```
T: OK, who are they? Who are they? Kamil?
S2: Tansen, Akbar, Sant Haridas.
T: OK. Very good. Who is Tansen's music teacher? Veda?
S3: Sant Haridas.
T: Yeah, very good.
```

She also conducted regular review activities mid-lesson to recap on learning so far: 'Let's quickly revise…', although reviews at the end of lessons were less common (only seen twice) likely due, in part, to unpredictable lesson lengths. Signposting strategies included brief overviews of her plan at the start of lessons and indications of progress mid-lesson.

In my field notes, I regularly noted a 'fast' or 'good' pace to lessons. For both silent reading tasks and learner activities she often provided time limits and reminders to keep learners focused. She also made use of specific strategies to maintain a brisk pace (e.g., a game in which the first pair to finish an exercise or activity shouted out 'Bingo!').

6.7.2 Negotiation and Improvisation

Nurjahan was frequently observed to negotiate with her learners. On a small number of occasions, this involved negotiating the lesson focus itself (twice), but more often it involved specifics of how an activity would be done. For example, how she would pre-teach new lexis, how extensive the activity would be, how feedback would be conducted or whether they would work collaboratively or individually:

```
EXTRACT 6.10: Nurjahan, Grade 8
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```
T: What shall we do first? Can we complete that
activity that we left yesterday? Let's take
yesterday's incomplete activity. Or should we take the
new activity? How many of you think that we should
go to the next activity? (SS raise hands) and how
many thinks, almost ten people, how many thinks we
should complete yesterday's activity? (SS raise hands,
majority) OK, that one question that we left. OK do
you want to discuss with groups, or do you want to
discuss in pairs?
SS:(majority) Group.
T: OK so can we quickly form the groups?
```

```
SS: Yes.

T: You know how to do that, so quickly make groups.
```

She usually went with the majority preference of the class, rationalising this with reference to learner autonomy:

JA: Tell me a bit about why you do the negotiating?

N: I think that's, like, giving them autonomy. Because if I only focus, or if I only think about my choices, it won't be a good idea… So they are considered important. If they feel the teacher is preferring our choices then they feel good.

On a number of occasions, Nurjahan was observed to make mid-lesson changes to her planned lesson, mainly in response to learner needs. This included, for example, the choice to replace a planned task with a simpler or more challenging one, the decision to conduct revision or review activities, and the decision to differentiate by providing an additional task to faster finishers.

6.7.3 Whole-Class Teaching

Nurjahan's teaching involved a balance between whole-class instruction and learner-independent (usually collaborative) activity work. As for many English teachers across Maharashtra state, the long, challenging texts often drawn upon for exam content constituted the primary focus of activities. Yet unlike the vast majority of English teachers I observed in Maharashtra (n =25), Nurjahan only occasionally explained and translated texts – a practice common across India (see Anderson, 2020c; Bhattacharya, 2013) – as she read through them, instead employing an approach that enabled her to gradually scaffold her learners' ability to read these texts independently themselves. After first pre-teaching key lexis and (usually) reading the text aloud herself, her learners would read individually and then work collaboratively on text comprehension activities, followed by detailed feedback. She broke these texts into 'smaller chunks', often splitting a text between several classes, giving several comprehension tasks each lesson that gradually increased in difficulty until she was satisfied that her learners had a thorough understanding of the text.

6.7.3.1 Pre-teaching of Lexis

Nurjahan would often pre-teach a number of items of lexis to prepare learners for reading tasks. In her exam-focused Grade 10 class, she often used both

direct translation and paraphrasing to do this, usually at a fast pace while learners took notes. In her Grade 8 and 9 classes, they would often play a word search game that she and her learners invented, in which they would hunt for and then spell a word in the text; Nurjahan would then write it on the board and elicit or give Marathi equivalents and part(s) of speech. She would sometimes also provide example sentences or comments on usage:

EXTRACT 6.11: Nurjahan, Grade 8

T: Next word is 'amazed'. (lots of hands go up almost instantly. T chuckles) Amazed. Page sixty-one, amazed. Er, Gayatri?

S1: A-M-A-Z-E-D.

T: OK. A-M-A-Z-E-D. (goes to board and writes it) Amazed means surprised. Can you guess the meaning? Surprised.

S2: *Surprised*.

T: *Surprised*, yes. He was amazed, he was surprised. *Surprised, the man was surprised. How did it happen?* (pauses for SS to write) Part of speech, or kind of word? Amazed, he was amazed.

S3: Adjective.

T: Adjective. Yeah, sometimes it works as an adjective.

Especially in her (officially English-medium) Grade 5 class she would often explain meanings in English or use mime and contextual clues to clarify meanings (e.g., 'shift the desk'). At all grades, she would usually finish vocabulary pre-teaching with brief pronunciation drills of the items. Her choice of lexical items (see Figure 6.4) included those provided in the text glossary as well as abstract lexis and idiomatic phrases (e.g., 'get round').

6.7.3.2 Questioning and Elicitation Strategies

Nurjahan made extensive use of varied questioning strategies throughout her lessons. As well as for reviews of prior learning (see above), she would frequently build context, or background schemata for new texts/poems through questioning, mainly lower-order, but also occasionally higher-order. Both instruction and concept check questions (adopted from British Council training workshops) were observed frequently:

Figure 6.4 Lexis pre-taught in one lesson, also showing English synonyms used (Grade 8)
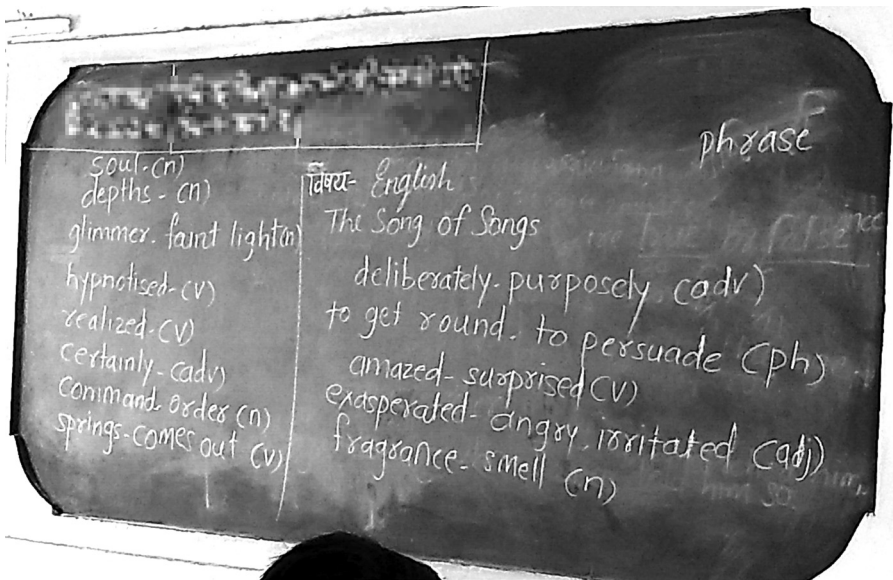
EXTRACT 6.12: Nurjahan, Grade 10

T: I'm giving you five minutes. Within five minutes,
you will be working with your partner. The answer
you will need is on page ninety-five, so work with
your partner and find out the activities which changed
Meena's life. How much time do you have? How much
time do you have?

SS: Five minutes.

T: Five minutes. Are you working alone or with
partner?

SS: (a few) Partner.

T: Loudly?

SS: Partner.

T: And where will you look for the answer? Which page
did I ask you?

SS: ninety-five.

T: Good. Start working.

6.7.3.3 Other Whole-Class Teaching Practices

Occasional grammar lessons involved what she called an 'inductive method'. She would provide numerous examples of usage of a particular structure, gradually accompanying this with questions and multilingual explanations to clarify the meaning, followed by controlled practice activities. She would also conduct short bouts of remedial teaching during feedback to activities (see below).

6.7.4 Activities

For approximately half of Nurjahan's lesson time, learners were engaged in various practice activities, most often reading practice and collaborative work on both text comprehension tasks and textbook activities. She also provided closed and partially open writing tasks; for example, allowing learners to think up their own example sentences using specific structures. However, only two activities were observed in which Nurjahan encouraged them to engage in monolingual conversation in English, indicating that this activity type, often emphasised as central to western models of communicative language teaching (e.g., Littlewood, 2014), was rare in her practice.

6.7.4.1 Reading Practice

During reading lessons, after pre-teaching relevant lexis Nurjahan would usually read through the text once aloud herself to provide 'a model' for the learners, something they actively requested during negotiation:

```
EXTRACT 6.13: Nurjahan, Grade 8

T: Do you want me to read first, or will you read?
Shall I read or will you?
SS: (varied, including) You.
T: Huh? How many people are waiting for me to read?
(many SS raise hands) OK, so I'll read one time, pay
attention.
```

After this, she would typically instruct the learners to read the section individually and silently. While they read Nurjahan would write her pre-prepared text comprehension tasks on the board, ready for the subsequent collaborative learning stage. She felt that this scaffolded approach to reading practice provided useful support for weaker learners with lower levels of literacy.

Figure 6.5 Collaborative learning in desk groups (Grade 9)

6.7.4.2 Collaborative Learning

Formal collaborative learning was observed in half of Nurjahan's thirty-two observed lessons, and informal pairwork occurred in an additional four. Collaborative learning activities were typically three to eight minutes in length and usually involved learners working with what she called 'bench partners' – two to three students sharing a bench (see Figure 6.5) – thereby reducing the need for movement and keeping groups small, although larger groups were also observed twice. Nurjahan generally chose collaborative learning for more challenging activities, observing that her learners benefitted from peer support:

> …it's a bit [more difficult], so for that I thought that if they will discuss with their partners it will become easier for them … if they need they can go back to their notes, and that will be a good way for them to collaborate and find those answers.

When she negotiated with her learners how they wanted to do an activity, the majority expressed a preference to work collaboratively; this finding

was consistent with data from learner focus group interviews.[8] However, she also experienced some difficulties getting some of the more able learners to work with their peers, linking this challenge to broader social issues on one occasion:

N: …collaboration is not that popular among students.

JA: Why?

N: Because they are living in a world where students are mostly self-centred so they prioritise to think on their own, so I think if they have to survive in the world, they need collaboration and for that purpose I'm making them do some groupwork … Sometimes the brightest students they also refuse: 'No, I have to focus on my own study.'

For this reason, she never forced learners to work together, although she often encouraged it when monitoring:

EXTRACT 6.14: Nurjahan, Grade 9

T: OK, Seema and Prachi, work together. That will be easier… (T moves on) Pratiksha and Aishwarya, you can always help each other.

Bench groups were most often used for text comprehension activities, including true/false, sentence completion, sentence ordering and mind-mapping tasks. Most learners began working on these tasks individually, consulting partners more as the activity progressed, discussing mainly in Marathi and Malvani, with some use of English, especially words and phrases from the text. On two occasions longer discussion activities were conducted in groups.

6.7.5   Differentiation

Nurjahan demonstrated a range of techniques that enabled her to differentiate effectively amongst learners of widely differing abilities in her classes. These included differentiation in language choice (see Section 6.5), differentiated behaviour management (see Section 6.4), her tutoring strategies while monitoring seatwork and her regular use of extension activities to keep higher achievers busy when they finished set tasks early:

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[8] Nurjahan's focus groups ranked 'includes pair and group work' equal second among the ten qualities of a good teacher.

EXTRACT 6.15: Nurjahan, Grade 8

OK Rex, now you have finished earlier, can you find out
the words related to music from the text? … Those who
have finished writing, copy down, er sorry, find out
the words relating to music from the text. *For those
who have written.* Rex? … Mayuresh, finished? OK, find
words related to music.

During feedback to these extension activities, she usually nominated only those who had had time to work on them to respond, aware that others may not be ready to respond.

6.7.6 Monitoring

As learners worked on activities, Nurjahan engaged in what might be called *active monitoring* (also see Section 7.5.6), moving briskly around the room, keeping learners on-task and providing individualised tuition. She was able to provide support to as many as twenty learners in three minutes in this way, an important strategy for her large classes:

EXTRACT 6.16: Nurjahan, Grade 8

T: (44:10, monitoring, to S1) Look at the spelling
Sakshi, 'assertive' and see sentence, look at the
spelling. *Look at the* spelling *of* assertive. *And this*
'n' *is not in the* sentence. (shows in the student's
notebook) … (44:40, to S2) *Leave little* gaps *between
the two words* … (44:50, to S3) Jagdish, *form the
letters* neatly (x) *writing* (x) spelling of 'sentence'.

Her tutoring was differentiated to learner needs and language ability, involving effective modelling, as well as mediation and scaffolding support:

EXTRACT 6.17: Nurjahan, Grade 8

T: Yes, Jagdish? (T approaches S1 who wants to show
an example sentence)

S1: Papa used every opportunity to express his
annoyance.

T: Papa used every opportunity to express his
annoyance. Is this positive or negative?

S1: Negative.

```
T: Negative. Which word is negative here?
S1: Every.
T: Every? Every means pratyek ('every' in Marathi).
S1: OK.
T: If you say about this, 'Mama and Papa did not
   allow' then it's a negative.
```

Learners often called her for assistance, revealing how comfortable with this method they were:

EXTRACT 6.18: Nurjahan, Grade 8

```
S1: Madam? (inaudible)
T: (checking her work) Yes, good. (looks up) Kamil,
   did you call me? Yes.
S2: (inaudible)
T: Show me the first one. Yes, good, great. Did you
   find it together or alone?
S3: (inaudible)
T: Wow! Good! Second, yes. Good, very nice. (looking
   up) Who called me?
```

She was clearly aware of the benefits of her monitoring strategies, including the opportunity for self-conscious teens to check their answers without risking making errors in front of the whole class:

> …there are many students who wouldn't get up, and who wouldn't dare to speak in front of the whole class, but they will show me that, yes, we're doing like this, and sometimes they are correct. Their answers are correct. So I think they get a boost when I appreciate their efforts.

She also conducted formative assessment while monitoring, sometimes offering *procedural feedback*[9] to the whole class in a louder voice, justified through the need to save time while also avoiding negatively impacting on individuals' self-esteem:

> Suppose if a group of learners are doing the same mistake again and again, then I can address it as a general issue, without hurting someone.

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[9] The term 'procedural feedback' is used here to refer to occasions when a teacher offers formative feedback to learners mid-way through an activity; this was often offered as guidance to the whole group based on assessments of progress made while monitoring.

6.7.7 Feedback to Activities

In addition to the individual and procedural feedback offered during monitoring (see Section 6.7.6), whole-class feedback was typically conducted after activities and involved elicitation and confirmation of answers (with praise) or correction, often elicited from peers. Learners were expected to raise their hands; shouting out and choral responses were discouraged:

EXTRACT 6.19: Nurjahan, Grade 5
No, no, no. No chorus answers.

More challenging items were elicited from those with hands raised – usually more able learners – although she also regularly invited others to try, particularly when she was aware that they had the correct answer, having noted this while monitoring (see Extract 6.2). When learners offered incorrect answers, they were still praised for their efforts:

EXTRACT 6.20: Nurjahan, Grade 5
T: We cleaned the school ground...(prompt for completion) Yes, Jesh?
S1: Last day ago.
T: Last day ago? OK. Who will help Jesh? Last day ago? But actually he is trying. Par?
S2: The day before yesterday.
T: OK.

Remedial teaching was provided if most or all the learners had experienced difficulty. Nurjahan often provided scaffolding support to elicit self-correction at such times, as in the following example involving two lexical items she had pre-taught earlier in the lesson:

EXTRACT 6.21: Nurjahan, Grade 8
T: OK, so time up. Can we have a look at the answers? First one, Tansen knew how to persuade his teacher.
S: False.
T: False, how many of you think it's false. (several SS raise hands) Now, check the meaning of 'get round', sorry 'persuade', and then let me know what's your answer. 'Persuade' *Look at the meaning and then tell me the answer.*

```
S: Persuade.
T: Persuade, and 'get round's' meaning?
SS: (inaudible)
T: Yes, so what do you think? Is the first one true or
false?
SS: (a few) True.
T: (smiles) True. Got it? That's why I said. It's all
about meaning of words.
```

Corrective feedback, particularly of pronunciation, was also common during feedback, often through the use of brisk, partial *recasts*.[10] Grammatical errors were also corrected through recasts, both partial and conversational, as in the following example, where two recasts are underlined:

EXTRACT 6.22: Nurjahan, Grade 5

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T: What did we do last week? (S1 raises her hand) Yes?
S1: We write sentence last week.
T: Yeah, we wrote sentences last week. Very nice, and
I can say (S2 raises hand)
S2: Read (/ri:d/) sentences.
T: We read (/red/) sentences last week, yes, OK.
```

Correction was also sometimes provided through prompts eliciting self- and peer-correction:

EXTRACT 6.23: Nurjahan, Grade 5

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T: I must use school or I must come to school?
```

Upon completion of feedback, Nurjahan would sometimes review correct answers to reinforce them and she would often ask learners to write up notes on correct answers for homework, partly for consolidation of learning but also to reduce peer-dependency among weaker learners:

> Why I ask them to write at home? Because it will be a kind of linking. Because they will learn something here. What do they do? Sometimes they just copy each other's answers. I want to avoid that, so when they get home they will at least try to recall what happened in the class.

[10] Recasts involve teacher reformulations of learner errors, often through meaningful conversational interaction, in part to avoid more direct, explicit criticism that could demotivate learners (see Goo, 2020).

6.7.8   Other Aspects of Nurjahan's Classroom Practice

Nurjahan frequently linked learning to her learners' prior knowledge and schemata, for example, by using true example sentences during grammar lessons: 'We are going to Tondavali' (Obs. 32, before a school trip to Tondavali). Occasionally she included activities that focused on study skills (e.g., reading skills, recording vocabulary), made use of energiser games or student presentations. While choral reading of sentences, phrases or words were occasionally observed, mainly for pronunciation practice, rote learning (which is common across India; e.g., Bhattacharya, 2013) was not, and neither were extended writing tasks or extended English-only speaking activities.

Nurjahan's classroom practices focused primarily on core curriculum content from the government-mandated textbooks. Yet, unlike other teachers in hers and comparable schools, rather than rushing to complete the curriculum, Nurjahan guided learners through it carefully, scaffolding tasks to their needs and building self-esteem systematically through the use of frequent positive reinforcement, varied differentiation strategies and mediation support during active monitoring and feedback to both individual and collaborative activities. She prioritised inclusion and understanding over the need to maximise the use of English in class and rejected the rote memorisation practices that are common across India and even expected by many students. Her adaptation of strategies that she had learnt in workshops and webinars was indicative of her ability to critically appropriate techniques and activities to the needs of her learners – evidence of a well-developed subject knowledge, regular critical reflection and a desire for lifelong learning (discussed below).

6.8   KNOWLEDGE

Nurjahan's English proficiency is at the highest assessable level for all four skills (C2 on the CEFR[11]). She exhibited extensive explicit subject knowledge in the three areas of grammar, lexis and pronunciation and was able to draw upon this knowledge well in the classroom. Her responsive clarifications, answers to learner questions and correction of errors all provided evidence of a well-developed PCK that made use of both her language proficiency and subject knowledge. For example, in response to a learner question encountered while monitoring, she was able to provide an impromptu well-exemplified explanation of the meaning and rules for usage of the structure 'neither…nor'.

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[11]   The Common European Framework of Reference.

Similar examples were observed in her clarification of lexis and pronunciation, such as her ability to clarify the meaning of 'deliberately' in three ways on one occasion: with an appropriate example sentence ('You deliberately pushed me.'); a synonym ('purposely'); and a Marathi equivalent ('*muddama*'). With regard to pronunciation, she regularly improvised brief drills of words learners had difficulty pronouncing.

Her subject knowledge was closely related to her curriculum knowledge and her extensive knowledge of her learners (documented above), enabling her, on several occasions, to correctly anticipate which words they were likely to have difficulty with, or had not previously studied. For example, on one occasion while observing her planning, I asked her about her choice to pre-teach the fairly common item 'pupil' before a reading text in which it appeared. She explained, 'That word I don't think has been taught to them in any standard'. Sure enough, the learners exhibited no prior knowledge of it in the subsequent lesson.

6.9   REFLECTION

Nurjahan took easily to reflection during the five post-lesson interviews conducted. She was able to describe her lesson aims or specific intentions clearly, and also to identify differences between the lesson as planned and as taught (see Anderson, 2015a). She evaluated each lesson in critical detail, often aware of both strengths and weaknesses: 'You want to talk about Grade 5 today? I don't think it was good'. The following global evaluation was fairly typical, and consistent with her belief in the importance of reflecting on the 'learning process' rather than her teaching *per se*:

JA: What are your reflections on the lesson today? How do you feel it went?

N: It went good. I can't say it was a great lesson. The vocabulary part went well. I'm happy that as we are progressing the learners are able to identify differences between verbs, nouns. Sometimes, yeah, they do mingle (confuse them) but most of the time they are good with them. And they are catching up with the pronunciation, they are doing the activities. Yes, but I'm not that good with collaboration, because still I find it difficult that, though there are instructions, like work with your partner, still they are not that much doing so, they focus on their individual needs, or there is not much collaboration, so I have to work on that.

When I asked her to reflect on the learning of an individual student, it was noticeable that she often paused for some time before responding, and then provided a detailed description. On several occasions, I pushed her to explain how she knew this – she was able to be specific about activity types, interaction while monitoring, and her observations of their notes, evidence of her conducting *informal formative assessment*[12] as she taught:

JA: …how do you observe her in a big class, how do you observe someone like that?

N: When she was doing activities, I was following her, and I checked understanding personally, because she was showing the evidence, she was giving me answers personally.

JA: And when did you check her understanding personally? When you were monitoring?

N: Yes, when I was monitoring.

JA: Did you question her or did you just look at her book?

N: I listened to her answers. She was talking with me, she was giving me evidence.

She also found it easy to recall specific moments of her interactive reflection (Anderson, 2019b) while she was teaching, what she called her 'during-class reflection' and to reflect further on these afterwards (Schön's 'reflection-on-reflection-in-action'; 1995):

One quality is that I can reflect during teaching also. Suppose if things are not going the way I think they should go, I can change that. So sometimes when I'm doing some activity, and I think, no students are not responding in that way, then I explain a little, or sometimes … I change the activity.

6.10 PROFESSIONALISM

Nurjahan's commitment to her professional development was clear. Since her graduation, she had already participated in a large number of teacher development programmes, both as a teacher and teacher educator. She was clearly eclectic in her practice, mentioning a number of techniques and

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[12] Also known as *assessment for learning*; see Section 9.12.

activities that she had learnt from mentors and workshops while also providing evidence that she adapted them to her learners' needs and context. This included her word search game for pre-teaching new lexis and her silent reading strategies, both adapted from training workshops: a 'thundercloud' strategy to get learners' attention at the end of collaborative learning activities and her use of meditation to prepare her home class for learning each day, based on a mindfulness workshop she had attended.

She had been selected for her trainer role quite early in her career while on a British Council course and subsequently became a mentor, one of only 80 selected from over 400 initial trainers on a state-wide project. Other teacher education opportunities followed, including other state-wide initiatives and her mentoring of other teachers on action research projects. She was also an active blogger for the British Council and operated as an 'ambassador' for AINET, one of India's largest English-language teacher associations.

During discussions, she revealed the influence of three important personal mentors in her development: a British Council trainer, a senior colleague and also her uncle, a retired headteacher (see Section 6.2) who also continued to support her. For example, he had helped her overcome initial challenges she had experienced with behaviour management.

6.11   EVIDENCE OF EXPERTISE IN NURJAHAN'S PRACTICE AND COGNITION

Nurjahan's portrait offers abundant evidence of teacher expertise, revealing features that are consistent with robust findings from prior studies of expert teachers worldwide (see Chapter 3) as well as findings on effective teaching in low-income contexts (see Chapter 4), although certain aspects of her expertise also seem to differ from practices documented in these literatures.

With regard to her knowledge base, this was extensive, integrated and readily accessible during practice (Bond et al., 2000), particularly with regard to her learners (Hanusova et al., 2013), the curriculum (Lawrie et al., 2019) and her own proficiency as a language teacher (Andrews & McNeill, 2005). This is in notable contrast to Popova et al.'s (2019, p. 1) observation that both subject and pedagogic knowledge are frequently found to be 'woefully low' among teachers in low- and middle-income countries. Nurjahan also demonstrated high awareness of what was happening in class (Wolff et al., 2015); she was able to deal with the unexpected, particularly with regard to behaviour management and learner challenges and make appropriate decisions as a result (Borko & Livingston, 1989; Westerman, 1991). Her extensive, focused

and sometimes critical reflection is also consistent with evidence from prior expertise research (e.g., Asaba, 2018; Gross, 2014).

Among her beliefs, her sense of moral duty (e.g., Hanusova et al., 2013) and belief in providing a broader education beyond the narrow exam focus of the school were reminiscent of Campbell's (1991) account of teachers who aimed to facilitate the growth of 'young people as whole human beings' (p. 37). However, her strong focus on the importance of building self-esteem, shared by almost all of the teachers in this study is a notable finding that is less well represented in the wider literature and discussed further in Chapters 7 and 9.

In the area of interpersonal practices, Nurjahan's positive rapport and inclusivity are also well supported in the wider literature on expert teachers (Smith & Strahan, 2004; Yang, 2014), consistent with Schempp et al.'s (2002) discussion of 'positive, accepting learning environments' (p. 105). Similarly, Westbrook et al. (2013) provide strong evidence that safe, supportive, inclusive learning environments are key to effective teaching in developing countries, leading to the inclusion of this in their framework as one of three strategies for effective teaching. While evidence on behaviour management is less detailed in the literature, Nurjahan's ability to ensure that inappropriate behaviour is 'nipped in the bud' (McBer, 2000, p. 15; also Hattie, 2003; Hogan et al., 2003) is well supported.

While the teacher expertise literature offers very little insight into multilingual practices among expert teachers (Anderson, 2022b) – perhaps unsurprising given the typically monolingual curricular contexts in the majority of countries involved[13]) – the literature on effective teaching in developing countries is supportive of Nurjahan's translanguaging practices. For example, Hardman et al. (2009) document similar codeswitching practices among key resource teachers in Kenya (also see Clegg & Afitska, 2011; Makalela, 2015; Probyn, 2019). Westbrook et al. (2013) include such practices as one of six strategies in their empirically derived effective teaching framework.

With regard to specific teaching strategies and approaches used in the classroom, this is likely to be more subject-specific, although there is clear evidence to support Nurjahan's balance of whole-class and collaborative learning, consistent with the well supported, albeit misleadingly named, 'Direct Instruction' (see Hattie, 2009). Collaborative learning receives particular emphasis in both expert teacher studies (Berliner, 1991; Gross, 2014) and the literature on effective teaching in developing countries; Westbrook et al. (2013) found that 15 studies supported the 'varied use of whole class, group and pair work' (p. 43),

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[13] 75% of expertise studies reviewed were conducted in the US, UK, China and Australia.

and Bhattacharjea et al. (2011) evidenced correlations between higher levels of collaborative learning and improved exam outcomes in India.

Nurjahan demonstrated evidence of *adaptive expertise*[14] (see Carbonell et al., 2014) in class, through both her flexibility and improvisation while teaching – well supported in the literature (e.g., Berliner, 2004; Sorensen, 2014). Her more specific practice of negotiating with learners is supported by only a small number of studies that mention expert teachers providing choice to learners (e.g., Smith & Strahan, 2004); this is also addressed in Chapters 7 and 9. Strong support was found for her use of clear routines and procedures (Leinhardt & Greeno, 1986) and cohesion between activities (Even et al., 1993).

The personalised support Nurjahan provided to her learners was largely consistent with both bodies of literature reviewed. Buhl-Wiggers et al. (2018) note that more effective teachers in Uganda were 'active throughout [the] classroom' (p. 28), suggesting practices similar to her active monitoring (also Milstein, 2015; Smith & Strahan, 2004). Likewise, her innovative strategies for differentiating also receive some support from teacher effectiveness research in India (Saigal, 2012), and more from studies of expert teachers (Goodwyn, 2011; Milstein, 2015). Scaffolding of cognitive development is particularly well supported in the teacher expertise literature. Both Chen (2001) and Traianou (2006) at times describe practices similar to Nurjahan's.

Finally, in the area of professional development, Nurjahan's commitment to continuing her own professional learning is well supported; expertise studies consistently report teachers who exhibit similar levels of commitment (Tsui, 2003), an interest in supporting colleagues (Smith & Strahan, 2004) and a desire to continue improving themselves (Hanusova et al., 2014), what Milstein (2015, p. 137) calls a 'growth orientation'.

Considered thus, it may appear that Nurjahan's expertise is highly consistent with that of teachers in other (higher income) contexts, and these numerous similarities are important to note. However, it is only through more systematic comparative analysis that we begin to notice that she also possesses a wide range of context-specific competencies, strategies and practices that are not frequently documented in prior expertise studies; most of these were also found among the other seven participant teachers and were invariably tied to contextual circumstances and challenges that were indicative of Southern contexts. These are explored in Chapters 7, 8 and 9.

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[14] 'Adaptive expertise' contrasts with 'routine expertise', and enables an expert to deal with unfamiliar situations or problems effectively (see 3.4 and 9.9).

7   Exploring the Quintain

Expert Indian Secondary Teachers of English

> Multicase research starts with the quintain. To understand it better, we study some of its single cases – its sites or manifestations. But it is the quintain we seek to understand. We study what is similar and different about the cases in order to understand the quintain better.
>
> (Stake, 2006, p. 6)

Robert E. Stake (2006) proposes the term 'quintain' (pronounced kwinton) to identify the focus of a comparative case study, noting that it is a 'target, but not a bull's eye' (p. 6) that can only be understood by studying a number of examples of its manifestations. This agrees well with my intention and approach in this study and also, importantly, with Sternberg and Horvath's (1995) notion of the expert teacher 'prototype' (see Chapter 3). Both seek not to pin down essential qualities but to hone in on core characteristics of the fuzzy phenomenon in question, recognising that while two examples of it may share comparatively few features, as more examples are investigated, patterns of family resemblance emerge, and it is these patterns that are potentially of greatest use in teacher expertise research.

    This chapter presents the reader with my understanding, as a researcher, of the quintain of my research, the expert Indian secondary teacher of English. In order to do this as convincingly as possible, it offers both quotes from interviews and extracts from lessons alongside tables that highlight specific tendencies and procedures drawn from all eight of the expert teachers that

I worked with (see Table 5.1 for summary details of the eight participants).[1] This understanding resulted from a number of comparative procedures and tools, namely a comparative spreadsheet and mind map as well as a more discursive cross-case analysis that focused on the structuring categories themselves rather than the participants; all are carefully documented in Anderson (2021) for interested readers. At times, observations of the 33 non-expert teachers observed are also referenced for comparison with the participant teachers (PTs), particularly where obvious differences were noted, to shed further light on the apparent characteristics of the quintain.

This chapter follows a similar 'narrative' order as Nurjahan's portrait in Chapter 6 to facilitate comparison of one example with the quintain itself. It starts with a focus on the beliefs about teaching and learning of the eight PTs that underpin both their relationships with learners and their pedagogic practices. Relationships are discussed after this, followed by discussion of what I have called *languaging practices*, rather than simply language choice or use, because these practices were more fluid and instinctual than the word 'choice' implies – recent theory into what applied linguists refer to as 'translanguaging' is drawn upon to do this. The teachers' pedagogic practices are then compared in some detail to ensure that the description provided is useful enough to inform the knowledge base of appropriate effective pedagogy in the context in question as well as the discussion in Chapter 9. The categories used here are those that evolved during data analysis, informed both by my initial exploratory research into understandings of effective teaching among Indian teachers of English (see Anderson, 2020d) and the inductive coding procedures mentioned briefly in Chapter 5.[2] On the basis of this detailed description of the PTs' pedagogic practices, their knowledge and reflection are discussed and carefully linked back to classroom data to offer evidence for how these two areas of cognition were investigated indirectly (unlike espoused beliefs). Finally, aspects of their professionalism are also discussed.

Throughout this chapter, the primary focus is on commonalities, as markers of the quintain, although areas of divergence are also often noted, occasionally with reference to Chapter 8, where these are discussed more

[1] Quotes and extracts from Nurjahan's case are cross-referenced to Chapter 6 to avoid repetition here.

[2] Once again, readers interested in further description of these procedures are referred to Anderson (2021).

systematically to ensure that the complexity of the quintain – which always seeks to elude oversimplification – is not neglected.

7.1 BELIEFS ABOUT TEACHING AND LEARNING

A number of often-related beliefs concerning aspects of teaching and learning were prominent in the discussion of six or more of the eight PTs: two broadly affective (in building self-confidence and engaging learners), three pedagogic (in constructivism, ensuring learner understanding and preparing learners for examinations) and one language-related (in multilingual inclusivity).

Seven PTs expressed a strong belief in the importance of building learners' self-esteem or self-confidence, both as a means to facilitate learning (e.g., by increasing the participation of shyer students) and as an aim in itself:

> For me the most important thing is that a child should gain confidence in whatever he is doing, whether it is language, or whether it is his life. When a child goes out of my class, he should not only remember the text … or the grammar lessons, he should remember how I want his future to be shaped, how I want him to be successful in the world. I think I want that as a larger aim in my teaching. (Dipika)

For three this was often discussed with reference to the most disadvantaged students they taught, particularly the importance of avoiding labelling learners:

> So here the society and the teachers, maybe they labelled them like they are duller, so they still believe that they can't do this … and because of that lack of confidence they are not doing well, so our main challenge is bringing the confidence to them and making them believe you are real students, you can do anything, like other students. (Raju)

Closely related to this belief, five PTs also discussed the importance of their learners achieving success in life, as Dipika notes above. Both Nurjahan and Shekhar, often through their teaching, conveyed the belief that everyone has strengths and weaknesses, yet can achieve success. In Extract 7.1 Shekhar does this by recounting an anecdote on the challenges faced by a famous Indian actor (Amitabh Bachchan) early in his career:

EXTRACT 7.1: Shekhar, Grade 10

T: [His father] *told him that* every man is unique in this world*, there will be something in you that you should find,* and then he found *that his voice made him world famous,* so like *there are always other qualities, and there is definitely virtue in everybody.* So *your* goal *in life, if you* set *one, you will achieve* success.[3]

Six teachers expressed a strong belief in the importance of engaging learners in the lesson content/topic and/or the language learning process for learning to happen effectively. Kuheli perceived that such engagement causes learners 'to pick up the language and start using it'. Raju discussed engagement as a means to 'ignite the child', and Dipika highlighted the importance of engaging disadvantaged or disaffected learners in the learning process. For Vinay, the aim was to engage learners in the process of learning through activities:

> My philosophy of learning is that if students are engaged in the process, so they will do things on their own, then only they will learn. Instead of listening to the things, they have to do something, they have to participate, they have to prepare, they have to present, they come onto the dais and they have to talk… (Vinay)

Seven PTs made reference to aspects of constructivism as part of their theory of learning, either directly referencing it (it has been regularly promoted in teacher training programmes in India since the late 1990s), or expressing beliefs in aspects of it, such as social constructivist beliefs in learners' ability to scaffold each other's learning, the importance of linking learning to learners' lives (see Section 6.3.2), and what might be called an anti-*tabula rasa* principle:

> Children are not blank slates. There is always something there in their minds when they come to your school. They already know many things, and you just have to pick up on that and start teaching. (Dipika)

Seven PTs discussed the complex relationship between their perceived (constructivist) role as facilitators of language learning and their responsibility

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[3] As in Chapter 6, unless otherwise indicated, the use of italics in extracts indicates phrases, words or morphemes (resources) that were originally uttered in languages other than English (including Bangla, Hindi, Marathi and Telugu in this chapter) and are here translated into English (see Section 7.5 for further discussion of translanguaging).

to prepare students for examinations effectively (also see Goodwyn, 2011, p. 109). While often critical of the singular focus on exam achievement that many of their schools adopted (see Section 6.3.2) and the rote learning that tended to result (what Kuheli referred to as a 'memorise and vomit' approach), most also revealed an awareness of the importance of examinations for their learners' future, and their need to ensure their teaching achieved this goal alongside their broader intentions for a more rounded development:

> …I have found such students that they were quite strong in English, yet they couldn't score well in exams, and in our exam-driven system of education, it is the score ultimately that matters … So I feel as a teacher it is my objective not only to help them develop that language skill, but also to make the right use of that skill in the exam hall to score well. (Kuheli)

All eight PTs shared a belief in the importance of involving learners' more-enabled languages (both their mother tongues and other community languages) in the learning process (see Sections 6.5.2 and 7.3.2). A number of reasons were given for this belief, including the need to develop their learners' understanding of more complex subject content (e.g., grammar rules, abstract lexis and literary devices) and cognition (e.g., higher-order and critical thinking). For most, this belief also related closely to the two affective beliefs discussed above (engaging learners and building self-esteem), noting that encouraging contributions in other languages maximised engagement, especially of less English-proficient learners and reduced the 'phobia' of English that Nurjahan discusses (Section 6.5.2). Two PTs prioritised the importance of meaningful interaction and communication above language choice, and were willing to sacrifice an English-mainly approach to facilitate this. Only two espoused a belief in maximising 'target language' (i.e., English) use among learners, but both were also aware of the role of learners' languages in progressing towards this goal.

An emphasis on ensuring learner understanding of content was prevalent in the belief systems of seven PTs, closely linked to their emphasis on the importance of engaging learners (see Section 9.3) and their need to make use of other languages and multilingual pedagogic practices as means to increase understanding (see Section 7.3.1). This belief also influenced planning decisions, such as their selective curriculum coverage (to allow time to prioritise understanding), and their beliefs in specific pedagogic strategies (e.g., questioning, nomination and eliciting feedback from learners) as means to check and reinforce understanding.

Several beliefs were shared among a smaller number of PTs. Five felt that language learning was different to other types of learning and four PTs discussed the importance of developing their learners' life skills and learner autonomy or responsibility (see Section 6.3.3). Beliefs that were important for just one or two PTs included Shekhar and Dipika's belief in the role of the teacher as moral authority and role model for learners and Vinay's belief in the importance of rephrasing/processing tasks. Kuheli espoused a belief in task-based learning, a language teaching approach (see, e.g., Ellis, 2003) and Gajanan in fighting social inequality and learning without fear, likely emanating from challenges that he faced growing up as a child from a highly disadvantaged background.

7.2 INTERPERSONAL PRACTICE

7.2.1 Relationships

Observed relationships between PTs and their learners were largely consistent with the two shared affective beliefs – in building self-esteem/self-confidence and engaging learners in learning. Alongside these, all PTs displayed evidence that they enjoyed their teaching, built relationships of mutual trust and respect with their learners and – as a result – had a positive rapport in the classroom.

There was clear evidence that building self-esteem or self-confidence was a regular feature of the practice of all PTs, particularly in the supportive personalities displayed in class. It manifested itself, most often through positive reinforcement (praise), common in the lessons of all PTs, often differentiated to individual achievements and typically heartfelt (see Extract 6.1). Boosting self-esteem was also a focus of individual support provided to learners, particularly while monitoring, through specific strategies such as making intentional errors, often playfully, as in the following example from Manjusha's teaching, by pretending to lack general knowledge that she knew her learners possessed (also see Extract 7.7):

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EXTRACT 7.2: Manjusha, Grade 9

T: I can't even put the thread in the needle. (SS
gasp with surprise) Then who is intelligent, am I
intelligent or are you?

SS: (S3 points at the teacher. All laugh.) Yes,
ma'am is.
```

> T: *No, that isn't sewing. Who is intelligent in sewing, more intelligent than me?*
>
> SS: (several, laughing) *We!/ We are* madam.

PTs' strong beliefs in engaging learners in lesson content were also reflected in classroom practices. Links were identified to numerous other themes, many of which shed illustrative light onto how they did this. This includes their interactive teaching strategies and regular use of humour, but also their ability to link lesson content to learners' lives, interests and schemata (see Section 6.7.8) and their willingness to give learners agency in language choice (see Section 6.5.2).

This ability to engage learners was closely linked both to their enjoyment of their work and the warm atmosphere and 'rapport' that all eight PTs cultivated with their learners. The adjectives I most frequently used to describe PTs' rapport with learners in individual case descriptions included 'patient' (5 times), 'encouraging' (4), 'caring' (4), 'gentle' (4) and 'warm' (3). Concerning their enjoyment of their work, perhaps the most obvious evidence of this came from their affective behaviour, with smiling, humour and jokes observed in most lessons. While jokes covered a wide range of topics, they avoided making jokes about learners' weaknesses or errors. For example, Kuheli's jokes covered topics such as the imagined inappropriate use of an informal register (Obs. 4), comic characters (Obs. 14), personal anecdotes (Obs. 17), a school picnic (Obs. 24), group work (Obs. 25), apostrophes (Obs. 28) and self-deprecating humour in reference to a crow that regularly visited the classroom window ledge each morning to caw for several minutes (Obs. 12, 21):

> EXTRACT 7.3: Kuheli, Grade 7
>
> T: Listen to the sweet voice of the crow. He wants to join us. (students laugh) Maybe he has found some similarity with my croaked voice, that's why he has come!

Particularly evident in several teachers' discussion of their relationships with older learners (Grades 9–10) was the importance of mutual respect and the need for what Kuheli called 'a relationship of trust'. Several provided regular pastoral support (see Section 6.4.2), evidence of the close connection between relationships and behaviour management.

Likely as a result of PTs' warm relationships and personal enjoyment in the classroom, their learners were observed to contribute regularly to

lessons (more so than in lessons of their peers), including a willingness to ask questions or request individual support, particularly during teacher monitoring of seatwork (see Extract 6.18), but also at other times. More occasionally, learners were also observed to make suggestions or requests and even offer jokes. For Gajanan, this culminated in an approach that he called 'learning without fear', which he felt was essential for effective classroom rapport:

> G: They were feeling at ease in the pairwork.
>
> JA: Explain a bit more, why?
>
> G: They were feeling because they had no fear in the mind that someone is pressurising me to answer it. (Gajanan)

Underpinning these close, caring relationships was the PTs personal knowledge and understanding of their learners (see Sections 6.4.1 and 7.6). Six of the eight had good memories for the names of their many students (up to 300 in two cases) and all eight exhibited a deep understanding of their learners' more general backgrounds, challenges and interests, sometimes discussing their 'backstories' during interviews. In several cases, there was clear evidence of what Rogers called 'unconditional positive regard' (1951) for their students, and while the sources of their 'love' or 'care/concern' for their learners varied, none were seen to blame them during discussions with me or colleagues, instead expressing understanding and empathy (also see Section 6.3.1):

> If, in their family, broken relationships are there, and these conflicts are there, then it affects their emotions, and the students, they think about, instead of concentrating on the studies and what teacher is saying, their mind is at home, so that becomes very challenging for students and for teachers to divert their mind towards learning. (Manjusha)

The PTs were also careful to avoid criticising learners in front of their classmates, a practice witnessed in the classes of seven of twenty-six non-participant English teachers observed.

There was also consistent evidence that seven of the eight teachers regularly (and the eighth occasionally) adapted their learning to cater for their learners' individual needs. This included the provision of differentiated feedback, particularly during monitoring (see Section 6.7.5), and extension tasks for fast finishers that allowed them to spend more time with less able learners (see Extract 7.11). Differentiation was also noticed in language choice and behaviour management (both discussed below). Unlike twelve of the

twenty-six non-participant teachers observed, the eight PTs rarely, if ever, taught to the top of the class (a common practice across India; Banerji, 2019b) and were more likely to plan activities and pitch questions to the mean ability level, leading to increased participation across the class (see Section 6.7.7).

7.2.2 Behaviour Management

Behaviour management challenges and responses varied among PTs due, in part, to class sizes (also see Chapter 8) . In the classes of four PTs, inappropriate learner behaviour was rare, due either to fairly small classes or stricter teacher behaviour. For the remaining four, off-task behaviour was more frequent, particularly among disaffected elder (Grades 9–10) male learners and linked to a variety of potential causes. Many of these learners had, for several reasons (principally low attendance), fallen behind in their studies, and, as a result, were sometimes disruptive or disobedient in order to save face in front of peers.

A range of strategies were observed among PTs for both preventing and responding to inappropriate behaviour. Two particularly strong preventative strategies discussed above were the positive rapport that all PTs cultivated and their ability to engage learners in the lesson focus. This included drawing on learners' lives and interests to provide examples (see Extract 7.10), engaging them with humour and involving potentially disruptive individuals directly. When inappropriate behaviour was spotted, two teachers in particular (Dipika and Nurjahan) exhibited a range of effective strategies to minimise disruption. Most often, they spotted off-task behaviour early and nipped it in the bud (see Extract 9.1), often through the use of learners' names to provide brief but firm reminders (see Extract 6.4). Also common, especially following repeated misbehaviour, was the practice of giving brief pep-talks to individuals after class, following which improvements were often observed. This avoided humiliating learners in front of classmates, which violated a commonly shared belief in mutual respect. Two PTs exhibited a differentiated approach to behaviour management, willing to be more lenient to learners with particular personal challenges (see Section 6.4.2). Other strategies tended to be individual and context-specific, such as Dipika's physical and aural presence, which was appropriate both to her own attributes (e.g., a powerful voice) and her context (crowded urban classes). Likewise, Nurjahan's use of homework monitors, a seating plan and meditation each morning (see Section 6.4.2) was facilitated by the practice of teachers starting each day with 'home classes' (only used in some Indian schools).

In the case of two PTs (Gajanan and Manjusha), disruptive behaviour was observed more frequently, due, in part, to a belief both held in providing learners

with more freedom to manage their own conduct in class. The more extensive off-task behaviour that this sometimes led to was, both felt, a price worth paying in order to have more egalitarian, dialogic interactions with learners:

> … if they are learning with their natural surroundings, then learning takes place. If I interrupt them in between under the name of discipline, I stop them, so the learning couldn't take place. Let them do the noise in the classroom, let them do lots of hustle-bustle … because that is also necessary to develop the relationship between them. Then only will they learn what is good and what is bad. (Manjusha)

While both also demonstrated the ability to control learners if exuberance got out of hand, less effective behaviour management strategies were also observed in their classes, such as requesting learners who had not been listening to repeat a classmate's contribution, which often took a long time, and caused a drop in lesson pace.

Occasions when inappropriate behaviour required specific sanctions were rare. For example, two teachers on one occasion each asked disruptive learners to stand in their place until they were able to successfully answer a question during whole-class teaching. No examples of exclusion, assignment of extra work or referral to a senior authority as sanctions were observed, although it is recognised that this may be, in part, a result of reactivity to my presence as a temporary, external observer.

7.3 LANGUAGING PRACTICES

While there was noticeable variation in PTs' own language use balance (see Chapter 8), all were multilingually inclusive in both their beliefs (see above) and practices, prioritising learner participation over the choice to maximise the use of English in class. All also, at times, made use of a more-enabled language (MEL) – usually the main school medium of instruction and not always the learners' first language – particularly when interacting with less English proficient learners. Frequently observed were practices that have recently come to be described as *translanguaging*[4] in applied linguistics, in which resources from different languages are blended and mixed freely to maximise communicative potential (Anderson, 2018b; García, 2009b); translanguaging was common during spoken interaction and less common in written language use, restricted to personal notes and boardwork.

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[4] The terms 'code-switching' and 'code-mixing' were previously used to refer to such practices (e.g., Matras, 2009) (also see Sections 9.7 and 11.2.1).

Table 7.1 Comparison of teachers' uses of MEL-mainly languaging

Function	Raj.	Vin.	She.	Gaj.	Dip.	Nur.	Man.	Kuh.	Mean
Translation of difficult lexis in text to MEL	3	2	3	3	3	3	3	3	2.9
Explaining conceptually difficult concepts (grammar, metaphor, etc.)	2	1	2	3	3	3	3	2	2.4
Interpreting text content (cross-linguistic mediation)	3	0	3	2	3	3	3	1	2.3
Tutoring learners while monitoring	1	2	2	3	3	2	3	2	2.3
Repeating after English to ensure understanding (e.g., instruction, question)	3	3	2	1	1	3	1	2	2.0
Giving advice (e.g., moral, for exams, for homework)	2	2	2	2	3	1	3	1	2.0
Administrative (e.g., roll call, school information)	1	1	2	2	3	3	3	1	2.0
Formative assessment (e.g., text comprehension questions, CCQs[1])	1	2	2	1	3	1	3	2	1.9
Building schemata	1	1	2	2	2	1	3	2	1.8
General classroom/task management	1	1	2	2	3	1	3	1	1.8
Contrastive analysis (e.g., syntax, pronunciation)	2	0	1	0	2	1	2	2	1.3
Translation to English as a pedagogic exercise	1	0	0	0	2	2	1	2	1.0
Written text (e.g., on board, on chits)	1	1	1	2	0	1	1	1	1.0
Average % of MEL used[2]	30%	12%	47%	25%	72%	24%	85%	11%	38%

Notes: Scores assigned as follows: 3 = frequently; 2 = sometimes; 1 = occasionally; 0 = not observed. 1. Concept check questions. 2. MEL use percentage was calculated as a proportion of total words uttered by the teacher in transcribed lessons (Shin et al., 2020).

7.3.1 Teachers' Languaging Practices

Significant variation was observed among PTs with regard to languaging practices, influenced both by contextual factors and individual differences in how they taught (also see Chapter 8). Five taught mainly in English, two mainly in the MEL and one balanced the two (see Table 7.1). Relationships were identified between their language selection and numerous other factors during data analysis, indicating that it played a pivotal role in the pedagogy of most of the PTs, particularly for scaffolding learning. Table 7.1 summarises the purposes for which different teachers made use of the MEL in class, also providing averages to reveal commonalities and differences.

Table 7.1 also reveals that there was noticeable variation within each PT's language balance, depending on who they were teaching (differences between both classes and learners), what they were teaching (MEL increased

in more cognitively challenging lessons) and what activity they were doing (see Section 6.5.2). Given that, for most, translanguaging was the norm, these complex practices are better understood as a continuum of resource use, from *MEL-mainly* (when the grammatical 'matrix' (Matras, 2009) was the MEL, but English resources were occasionally included) to *English-mainly* (when English dominated); thus, these two terms are used in the discussion below. As such, translanguaging was one of many prominent commonalities among PTs. While PTs' translanguaging may not always be evident in lesson extracts, which are usually presented in English in this book (although note the use of italics to denote words originally uttered in other languages), the dual language extracts below and those in Section 6.5 above provide insights into this area (also see Anderson, 2022b). In the following extract, Vinay is actively monitoring learner group work, serving as a consultant or resource persons for his learners' questions. Notice how the two languages blend together seamlessly – there is no 'code-switching', only languaging:

EXTRACT 7.4: Vinay, Grade 7

S1: (inaudible question)	S1: (inaudible question)
T: *Haa*? Question *haa?*	T: *Yes*? Your question, *yes*?
S1: Mice *ante?*	S1: *What is* mice?
T: Mice *ante* mouse. Singular *annatu okkatunte* mouse. *Rendunte* mice.	T: Mice *means* mouse. *In* singular *it is* mouse. *If there are two,* mice.
S1: (inaudible question)	S1: (inaudible question)
T: *Haa?* What would happen if the person who opened the cupboard found any of the mice?	T: *Yes?* What would happen if the person who opened the cupboard found any of the mice?
S2: Sir describe *ante?*	S2: Sir, *what's* describe?
T: *Haa?*	T: *Yes*?
S2: Describe?	S2: Describe?
T: Describe *ante vivarinchatam. Chaduvu* question *motham.*	T: Describe *means explain in detail. First read the* question *completely.*

S2: 'Describe the town mouse ex…' (has difficulty reading)	S2: 'Describe the town mouse ex…' (has difficulty reading)
T: (helping) 'town mouse's experience in the countryside.' Countryside *ki vachinaka* town mouse *yokka* experiences *rayali. Haa?* Describe *ante cheppali vivarinchali etla emaindi ani. Patam lo vuntayi chadavandi* find out.	T: (helping) 'town mouse's experience in the countryside.' *Write down the* town mouse*'s* experiences *when it came to the* countryside. *Yes*? Describe *means explaining how it happened. Everything in the lesson read it and* find out.
S3: Sir, *cheptara?*	S3: Sir, *can you explain this*?
T: *Haa, ee* question? Fifth question…	T: *Yes, which* question? Fifth question…

For all PTs, English served as the default written language in materials and on the board, although occasional exceptions included noting translations and phonological features of English through the MEL on the board (see Figure 7.9).

7.3.2 Learners' Languaging Practice

While all PTs shared MEL-inclusive beliefs (see Sections 6.5.2 and 7.1), there were clinal differences in how these manifested themselves in class. Kuheli espoused a belief in maximising 'target language' use, gently encouraging weaker learners to use more English, and putting more concerted pressure on stronger learners to use English during group work (i.e., differentiated expectations). Shekhar frowned upon learners' taking notes in the MEL, but allowed it for pragmatic purposes, and also expected learner contributions during whole-class teaching to be in English, noting on one occasion, '…if they give answers in Marathi to my developmental questions, then it carries no point'.

The remainder were regularly willing to sacrifice maximal English use to ensure inclusivity and engagement, allowing or encouraging the MEL if they noticed learner difficulties with English, as Dipika does here, building the learner's self-confidence in the process:

EXTRACT 7.5: Dipika, Grade 9

T: *Yah teen* line *me se batao*. (silence) *Batana uski visheshan batao*. (silence) *Hindi me bolo. Yah teen* line *me se* dinosaur *ke visheshtaen batao, Hindi me*.	T: *Someone from these three* lines *tell me*. (silence) *Tell me an adjective*. (silence) *Speak in Hindi. From these three* lines, *tell us a characteristic of* dinosaurs, *in Hindi*.
S1: (standing) Danger *rahta*.	S1: (standing) *It makes* danger.
T: Danger *rahta na, to kya bolo* English *me?*	T: *It makes* danger, *so how to say in* English?
S1: Dangerous.	S1: Dangerous.
T: Dangerous. Adjective, *kya ho jaega?*	T: Dangerous. *What* adjective *goes there?*
SS: Dangerous.	SS: Dangerous.
T: Very good. *Baitho*. (motions for S1 to sit down).	T: Very good. *Sit down.* (motions for S1 to sit down).

When interacting with each other, learner discourse in all classes typically involved MEL-mainly translanguaging, in which they embedded English lexical resources from a text or writing task into a MEL-mainly matrix, as Kuheli's students did here during pairwork discussion of a story composition task:

EXTRACT 7.6: Kuheli, Grade 8

S1: (composing) We had decided	S1: (composing) We had decided
S2: *Khali kaekta* words er her pher ache (pause), sentence *eki. Oi bolna* we had decided *ki korechilam?*	S2: *Only some of the* words *are different* (pause), the sentence *is the same. Hey, say* we had decided *what we did?*
S1: *korechilam* (thinking)	S1: *we did* (thinking)
S2: *iccha puroner,* English *ki? Amar iccha chilo* sea voyage *e jabo* (inaudible) *korar jonyo.*	S2: *to fulfil your wish, what is it in* English? *My wish was to go on a* sea voyage (inaudible) *to do.*

S2: I had a wish (inaudible) *tarpor likhbo je or puron hoye geche icchata.*	S2: I had a wish (inaudible) *then we will write this wish is fulfilled.*
S1: *Puron hobe.* (inaudible) *korar jonyo.* I (pause) *korar jonyo?*	S1: *W̶ill get fulfilled.* (inaudible) *to do.* I (pause) *to do?*
S1: fulfil my wish?	S1: fulfil my wish?
S2: fulfil, *ha*, fulfil, fulfil my wish.	S2: fulfil, *yes*, fulfil, fulfil my wish.

While the MEL dominated spoken language use in class, learners would occasionally elect to use English, even if there was no pressure for them to do so, and there was also evidence, particularly in Manjusha's and Dipika's classes, that learners' translanguaging practices often mirrored their teachers', in interaction both with each other and with the teacher. The following example involves entirely English lexical resources connected through Hindi grammatical resources and word order to maximum communicative effect as a learner responds instinctively and meaningfully upon spotting an intentional (playful) teacher spelling mistake on the board:

EXTRACT 7.7: Manjusha, Grade 8	
S1: Ah madam, badminton *ki* spelling wrong *hai*!	S1: Ah, madam, the spelling *of* badminton *is* wrong!

While they completed exercises and composition work almost always in English, learners would make use of MEL for informal notes, particularly on aspects of lexis, either in notebooks, or through annotations to textbook texts (see Figure 7.1).

7.4 CURRICULUM COVERAGE AND PLANNING

7.4.1 Curriculum Coverage and TLMs

In all three curriculum authorities, given the strong link between textbooks (as the *de facto* curriculum) and examinations, and the strong emphasis on exam success in PTs' schools, it was not surprising that there was extensive use of the textbook (in over 75% of lessons observed). Five of the eight PTs nonetheless made use of it selectively – while all covered the longer texts that often appeared in examinations as 'seen texts', several

Figure 7.1 A student's multilingual annotations to her textbook (Grade 10)
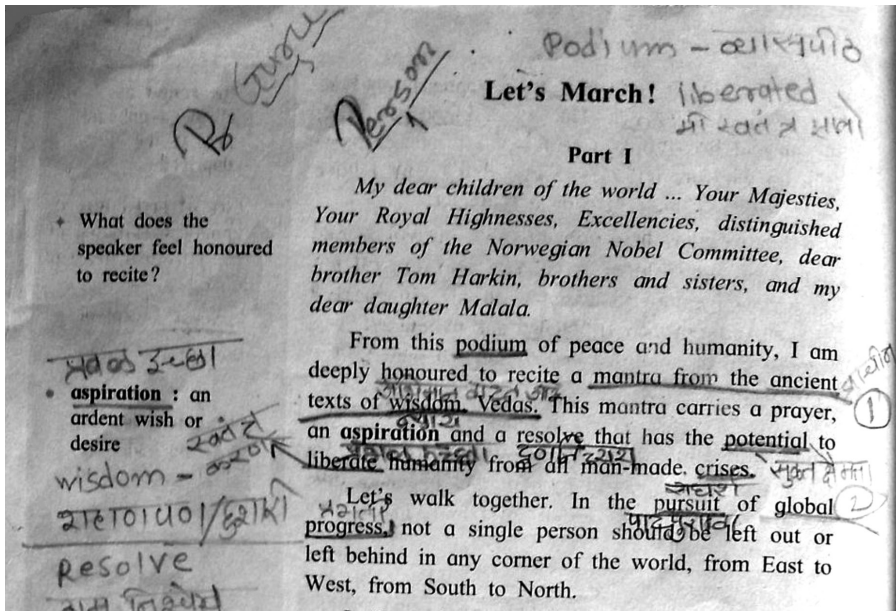
reduced their use of the practice exercises that usually followed these texts. Vinay avoided them altogether, Kuheli frequently skipped easier ones, and Manjusha and Gajanan often found it necessary to simplify or substitute them with easier activities. A number of causal factors were found to influence PTs choices when adapting textbook materials, including low learner interest in school, complexity of the material and exam washback, meaning that most regularly departed from the set curriculum in order to make learning targets more realistic, content more accessible and relevant (through personalisation) and to maximise learner engagement (also see Section 6.6.1):

> I follow the syllabus and I follow the textbook basically, and I try to make the textbook alive to them, but I don't really teach the textbook. What I try to do is I try to integrate their knowledge about other things, other topics which can be associated with the topic given in the textbook and that way I try to draw them out of their shell, so that they become easy in the class and they start talking about things that they know interest them. (Kuheli)

For Dipika, the academic year was heavily structured by the school (see Section 8.2). The remaining seven were much freer to structure learning between practice and final examinations each year, although in most of the

Figure 7.2 Manjusha using differentiated photocopiable resources in small classes (Grade 8)

PTs' schools, there was an expectation that all teachers finish the curriculum within the first half of the academic year and then focus on exam preparation for the second half. Despite this pressure, which was also observed to come from learners on occasions, most of the PTs took longer than their colleagues to complete the textbook materials (see Section 6.6.1), progressing only when they felt their learners had understood. Two (Vinay and Manjusha) also made space for regular project work.

Supplementary teaching and learning materials (TLMs) were frequently used only by two PTs, although others manifested occasional use. They included pre-prepared 'chits' and flashcards for group work activities (Shekhar) and computer-printed materials, viable in Manjusha's small classes (see Figure 7.2). Dipika and Kuheli used supplementary exercise books: Dipika for exam practice and Kuheli for grammar exercises, copied to the board as extension tasks for fast finishers. However, the majority of supplementary activities were resourceless; approximately half of Vinay's lessons were project-based, most of Nurjahan's lessons involved her own text comprehension activities written on the board, and both Gajanan and Raju sometimes improvised listening activities based on textbook texts. ICT was important to the practice of only one PT (Vinay); the remainder made only occasional use of their own mobile phone to show videos, play songs, or check information in response to questions and interests.

Figure 7.3 Example page from Dipika's lesson notebook (Grade 10)

7.4.2 Planning

While one PT (Dipika) was required to write brief lesson plans for each lesson (see Figure 7.3), and two often made brief personal notes or annotations to the textbook (Figure 6.3), planning was primarily a mental activity for the eight PTs; as Scrivener (2005, p. 109) put it, 'imagining the lesson before it happens':

> The planning happens, everything here itself (points at his head) … It's in my mind. I plan everything there myself, I don't write anything and I don't put anything on paper. (Vinay)

> [My planning] contains more reflection, less writing … I just imagine well in advance what I would be doing in class. (Shekhar)

For most of the PTs, planning tended to occur primarily on a lesson-by-lesson basis, although for three, longer-term planning for projects or extended topics was also noted (e.g., Vinay's projects and Shekhar's 2-lesson cycles, with text-based instruction in the first and group work in the second). Observations of the planning process (including a think-aloud protocol task) indicated that this involved looking through textbook materials for a given lesson, considering their appropriacy to learners' needs, deciding which activities to cover, and whether to supplement or replace with alternatives. Written notes were usually restricted to question items or activities that they planned to use in class (see Figure 6.3). Time estimates for planning per lesson ranged from 'a few minutes' (Gajanan) to 'fifteen to twenty-five minutes' (Shekhar), although these increased on occasions when bespoke TLMs were required. Planning occurred both in the staff room (observed for all) and at home. Three PTs acknowledged, on occasion, to have done no, or very little mental planning for a specific lesson, due either to workload challenges or sudden schedule changes (see Nurjahan's third quote in Section 6.6.2); differences were usually evident.

Causative evidence emerged for at least four PTs that planning was made significantly more difficult by two contextual constraints. The first of these was the irregularity of lesson length; in all contexts, school bells were rung by peons whose timekeeping skills varied greatly. As a result, lessons that should have been thirty-five minutes long varied between eighteen and fifty-one minutes in length (see Figure 7.4). The second was the difficulty in predicting learner attendance (see Figure 7.5), which became evident during a think-aloud protocol activity when Kuheli mentally planned for two very different lessons contingent on learner attendance:

> I was just thinking how to introduce the story, and if there are only a few students whether it would be right to start the story as such, because I'd be giving, I'm trying to use their schemata, so if only a few girls are there, how appropriate would it be to start the story right away. (Think-aloud protocol; Kuheli)

Sure enough, only 15% of the learners showed up for the lesson in question, causing her to negotiate the focus with them (see Extract 8.3). When combined, these two constraints often made it difficult for PTs to plan lessons in detail: they didn't know how long the lesson would be, nor how many learners would come. As a result, both in-class negotiation and improvisation were regular for several PTs, particularly the three who had the most unpredictable lesson lengths.

Figure 7.4 Irregularity of lesson lengths in each teacher's school when compared with official timetables
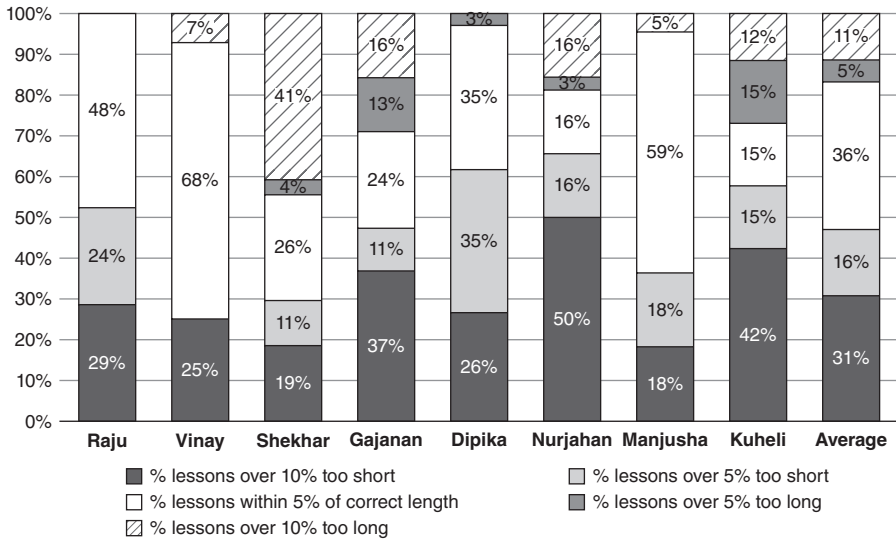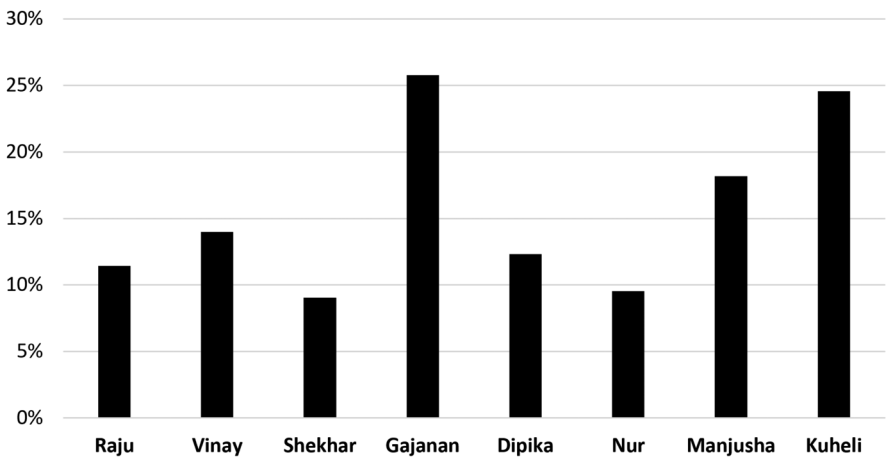

Legend:
- ■ % lessons over 10% too short
- □ % lessons within 5% of correct length
- ▨ % lessons over 10% too long
- ▢ % lessons over 5% too short
- ▩ % lessons over 5% too long

Figure 7.5 Percentage difference between student attendance means and maximums during the observation period

7.5   CLASSROOM PRACTICE

Classroom practice was the area in which the greatest variation was observed among PTs and is also discussed in Chapter 8 as a result, although there were still a number of important similarities in this area. For example, most of the eight PTs were observed to make use of both interactive whole-class teaching

and independent activity work, both individual and collaborative. Almost all regularly engaged in active monitoring (discussed below) during activity work, providing individual tuition, answering learner questions and assessing progress. Most also engaged regularly in negotiating aspects of lesson content and procedure with learners, also adapting content and improvising if required to accommodate emerging learner needs. Notably, rote learning – common across India – was not observed in PTs' lessons.

7.5.1 Lesson Structure

Several patterns were noted in aspects of lesson structure across the eight PTs. Five included frequent reviews of prior learning at the start of lessons, six included reviews mid-lesson and two included regular signposting and schemata building before new topics or texts. Such reviews most often involved interactive questioning or elicitation as in the following review of a story from a previous lesson called 'Half the Price' (also see Extract 6.9):

EXTRACT 7.8: Raju, Grade 6

T: So we have completed Half the Price. So have you gone through it? *Have you looked at it after going home*? *Have you read the lesson* Half the price? (SS nod) What are the main characters in that?

S1: Fisherman.

S2: Fisherman, gatekeeper.

Multiple SS: (enthusiastically) *The King*!

T: And *the king*. So what we come to know from that story? Who was the wise, wisest one?

S3: Sir, fisherman.

T: Fisherman. Why?

S3: Sir, he…(inaudible)

S1: Two hundred lashes.

T: Two hundred lashes. He asked for two hundred lashes, with the intention of giving the half price to the? (rising intonation)

SS: Gatekeeper!

T: Gatekeeper. OK. It's good. Now turn to page number one hundred sixteen.

Reviews at the end of lessons were uncommon, likely due, in part, to the unpredictable lesson lengths discussed above. Instead, teachers used the limited time available to give homework tasks.

Six of the eight PTs had a fairly small, identifiable number of predictable lesson structures that they followed (e.g., for reading lessons or exam practice lessons). The pace of instruction was noted as 'brisk' or 'fast' for three, but more dependent on activity type for five, rationalised by Manjusha as follows:

> Always I have to give the preference and space, to give sufficient time to complete the activity for the students, and give their own pace for learning without rushing on to the next task. (Manjusha)

7.5.2 Negotiation and Improvisation

Both negotiation and improvisation were regularly observed in PTs' lessons. Negotiation, when teachers consulted learners concerning aspects of the lesson content or procedure, was found to be frequent or regular for six and occasional for two PTs. It typically involved the teacher either asking learners for their preferences or responding to impromptu learner requests by consulting the class. While this sometimes included negotiating the lesson focus (see Extract 8.3), it more often concerned specific aspects of the lesson; for example, whether learners wanted to do an activity collaboratively or individually, how much time they needed or the order of activities in a lesson (see Extract 6.10). It was most often justified through reference to developing learner autonomy (see 6.7.2) and increasing engagement:

> JA: Why do you negotiate your lessons with the students?
>
> G: Because I try to find their demand, what they are interested in, because the students are aware that, yes, we have left that so-and-so question, so I want to make them aware of that curriculum also, the syllabus, and if I go according to their interest, so I think it's better for me as well and for them also. (Gajanan)

While it is always difficult to assess the frequency of teacher improvisation when observing lessons for which there was no written plan, post-lesson interviews provided opportunities to confirm suspected instances of improvisation.[5] It most often seemed to happen in response to emergent student

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5 'Improvisation' here refers to occasions when the teacher made changes to their intended lesson focus or activities in order to respond to an unplanned affordance during the lesson (see Anderson, 2015a).

needs or the teacher detecting that an activity or text is too challenging for many learners, but it also occurred in response to learner questions or interest in certain phenomena or topics (see Extract 7.10).

Closely related to improvisation, a number of examples of *interactive reflection* (reflection during the lesson event; Anderson, 2019b) were detected and corroborated (during post-lesson interviews) for seven PTs and confirmed as frequent for at least two, including Nurjahan's 'during-class reflection' (see Section 6.9). The following 'stop-and-think' moment (Arendt, 1971) occurred when Kuheli – while assessing her learners' prior knowledge of verb tenses in English – detected a misunderstanding, which led to her improvising an impromptu review activity:

EXTRACT 7.9: Kuheli, Grade 8

T: (pointing at simple past sentence on board) You think this is past perfect?

S1: Yes ma'am.

T: *OK.* (pauses to think) *Sit down.* (calmly indicates for S1 to sit down) *Do you also feel the same? Which is right?* (most SS are silent, none confident to answer) *OK.*

It was notable that there was a clear relationship between these three practices – those PTs who engaged in more negotiation also yielded evidence of more improvisation and interactive reflection, and vice versa, on a fairly consistent scale across the eight PTs.

7.5.3 Whole-Class Teaching

Whole-class teaching (WCT) was a regular feature of seven of the eight PTs' classroom practice. It was usually interactive[6] and often preceded independent learner activities.

Three PTs frequently made use of whole-class teaching to lead learners through the long, often complex texts that formed the core of the English curriculum in a process that might be called *text interpretation*, necessitated because many of their learners had levels of English literacy and proficiency that were too low for them to read these texts independently. While many of their colleagues simply read through and translated the text for the learners (see Bhattacharya, 2013; Borg et al., 2022), for the PTs text interpretation

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[6] i.e. consistent with Campbell et al.'s 'whole-class interactive teaching' (2004b).

Table 7.2 Typical stages of Shekhar's scaffolded text interpretation

Stage	Procedure
1	Teacher leads into text section and/or reviews prior section(s).
2	Teacher recites, then translates and explains a paragraph of the text using board to note 'key points' (lexical items and chunks; see Figure 7.9) in English, also explaining literary devices at this stage.
3	Teacher conducts a brief pronunciation drill of the key lexical points.
4	Teacher provides time for learners to take notes, monitoring to offer support where required.
5	Teacher asks 'developmental questions'; usually closed comprehension questions on the text to check and consolidate learner understanding.
Post-interpretation task	Learners engage in a group work 'discussion activity' to recycle the key points they have learnt.

was a more structured, scaffolded mediation activity in which they facilitated understanding while also strengthening learners' lexicons and developing their ability to read such texts independently in the future. Table 7.2 shows the typical stages in Shekhar's interpretation lessons. Aside from these three PTs who made regular use of text interpretation, four other PTs made occasional use of it, but it was never observed in one PT's (Vinay's) lessons.

For two PTs who made use of text interpretation only occasionally (Nurjahan and Kuheli) WCT usually preceded learner-independent reading and was used to build schemata and pre-teach lexis (see Section 6.7.3.1). It was also used after reading to elicit feedback, provide clarification and offer ad hoc remedial instruction (see Extract 6.21). The eighth teacher, Vinay, made use of whole-class teaching sparingly, most often to lead learners through audio-visual content, especially as a lead in to lesson topics or specific texts.

7.5.4 Questioning and Elicitation Strategies

During WCT, various questioning and elicitation strategies were common for seven PTs, sometimes integrated into more dialogic interactions in which learners also asked questions and initiated conversations. Teacher-led questioning was most often lower-order and typically closed, used primarily to check understanding, either during text interpretation or during feedback to independent reading tasks or exercises. However, there were also examples of more open, and sometimes higher-order questions, particularly for Dipika, Kuheli and

Table 7.3 Question types and examples from one of Dipika's lessons (Grade 8, Hindi-mainly)

Reviewing prior learning:	*What did we study in the last lesson? Who can tell me one or two lines?*
Lexical noticing:	*What word did he use for grandchildren?*
Building schemata:	*So who would have designed the house?*
Building metalanguage:	*So what does 'verb' mean?*
Describing:	*How did he do his work?*
Negotiating:	*Shall we read that again, or continue?*
Text comprehension:	*So what did the mason decide to do?*
Checking instructions:	*Which things are we going to underline?*
Empathising:	*How will the mason be feeling?*
Speculating:	*So what would have happened to him?*
Reflecting on learning:	*So what have we learnt in this lesson?*

Nurjahan. Table 7.3 illustrates the variety of question types used by Dipika in one lesson. Because she taught predominantly through Hindi (her school medium of instruction), she was able to ask a larger number of more complex questions than those who questioned their learners predominantly in English.

Another strategy that was strongly associated with WCT was the constructivist practice of linking learning to learners' lives and experience, common for five PTs. This included giving or eliciting examples that were familiar to learners (see Section 6.7.8), linking new concepts to their current schemata, or exploiting unplanned affordances to facilitate learning. The following example illustrates this well, when Gajanan, at the start of a lesson, shows interest in a photograph that several girls are discussing, and uses it to steer them towards his intended lesson focus of word associations:

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EXTRACT 7.10: Gajanan, Grade 9
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T: What is there? Can I see? (approaches three girls tentatively, smiling and showing interest) Can I see what is there? *Can I see it?* (T returns to centre of classroom and shows it to the class). Oh! That's very lovely! See! What is this? *What do we call it?*

SS: (various responses including) Photo!

T: Photograph. *Whose is it?*

SS: (various responses, mainly MEL) *It's a student's!*

T: It's a? (rising intonation)

```
S1: Student's.

T: A student's. A student's. (goes to board, writes
'student's') Student's. (he circles it) OK. Yes.
Students are here. Huh? In the centre. That's right
(showing on the picture) The students are here in the
centre. Let's do one thing, let's write words related
to students. Yes?
```

Whole-class grammar presentations were also seen, but were infrequent, ranging from 1 to 5 instances per teacher during the total observation period, sometimes followed by controlled practice activities. Several teachers were also observed completing textbook exercises in whole-class mode on occasions, although this was usually less common than through either collaborative or individual independent seatwork, except in Raju's small classes (usually under 10 learners), where he would often lead them through such exercises himself.

7.5.5 Learner-Independent Activities

There was a comparatively high frequency of use of *learner-independent activities*[7] among PTs when compared with their peers, among whom such activities were only seen in ten of forty observations,[8] and were frequently rushed through, allowing little time for independent thinking, and only once attempting (very limited) collaboration between learners. In contrast to this, for seven PTs, learner-independent activities were a regular feature of their practice, occurring in the majority of lessons. Most PTs balanced between collaborative (involving pairwork or group work) and individual seatwork for such activities, often rationalising the need for both. Individual seatwork was justified with reference to the need to prepare learners for examinations, and the preferences of some learners (see Section 6.7.4), but also in order to develop independent thinking – as Kuheli put it: 'I want them to have their own interpretation as well'.

Formal (i.e., instructed by the teacher) collaborative learning was seen in 45% of PT lessons observed, and informal (when learners worked together without being instructed to do so) in a further 12%, although this

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[7] The term 'learner-independent activities' is used here to refer to exercises, activities and tasks carried out by learners independently through individual seatwork, pairwork and group work.

[8] This may have been influenced by greater reactivity to the observer.

Table 7.4 Percentage of lessons in which formal and informal collaborative learning were observed

	Raj.	Vin.	She.	Gaj.	Dip.	Nur.	Man.	Kuh.	MEAN
Formal group or pairwork only	10%	72%	70%	32%	24%	50%	50%	50%	45%
Formal and informal group or pairwork	10%	91%	78%	45%	44%	63%	57%	71%	57%

varied widely among PTs (see Table 7.4). They often justified their use of collaborative learning through reference to constructivism, 'learning without fear', social development and the value of peer-instruction, particularly for lower-achieving learners:

> [I wanted them to] work in collaboration, develop their rapport, establish rapport between them and always I've experienced that group work can become successful and it helps weak students also. At least they keep engaged in the activity, observe what their colleagues, friends are doing. (Manjusha)

The length of group work activities varied greatly, from mainly short activities (2–5 minutes) in the case of Shekhar, who nonetheless included these in most lessons, to whole lessons in the case of Vinay's project work and Shekhar's quiz lessons. Group sizes varied, depending both on teacher preference and classroom constraints, with bench groups (2–3 learners who share a bench) common, especially for shorter tasks and large groups for more extended tasks (example group sizes: 3–6 for Vinay; 4–7 for Manjusha; 5–10 for Shekhar), when some learners would turn round to work with those behind them (see Figure 7.6) or sit in circles on the floor (see Figure 7.7). The mantra 'talk to your friend' was often heard to encourage collaboration.

Activity types varied widely among PTs, each tending to have personal preferences. This included both silent individual and collaborative text comprehension tasks and exam tasks as well as controlled language practice and vocabulary building exercises. Several teachers often created their own activities, including Shekhar's matching, sorting (see Figure 9.1) and brainstorming activities, Vinay's and Manjusha's project tasks, Gajanan's improvised tasks and Nurjahan's board-written comprehension tasks (see Section 6.7.4); two made regular use of TLMs for some of these activities. Free production tasks (involving extended writing and speaking opportunities of the type promoted in communicative language teaching) were observed only occasionally; learners usually translanguaged during speaking tasks (see Extract 7.6; also Anderson, 2022b). Several types of differentiation were observed in activity use, including differentiation between groups and the use of extension tasks for early finishers (also see Extract 6.15):

Figure 7.6 Manjusha's learners engaged in small group collaborative learning (Grade 9)

Figure 7.7 Vinay's students often preferred to sit on the floor for project work (Grade 7)

EXTRACT 7.11: Vinay, Grade 9

T: And those who are already finished, you have
to write a brief report of your project, so your
journey: how you began, how it went well, what are
the struggles or the challenges you faced while
preparing your project, and even while presenting.
Write individually, not groupwork. OK?

Several also encouraged stronger learners to help weaker peers during such lesson stages (see Extract 6.8).

7.5.6 Active Monitoring

Another notable finding consistent with the use of independent activities was the *active monitoring* that almost all PTs engaged in regularly during activity work, when the teacher would move around the room, interacting with individuals or groups and performing a range of roles. Most common was the tutoring role, when the teacher would spend a little time supporting individual learners (sometimes groups), offering positive reinforcement, error correction and short episodes of personalised teaching, often including elicitation and guided discovery (see Section 6.7.6). Also common was a consultant role, in which learners would request teacher support (see Extracts 6.18, 7.4 and 7.17). Other roles observed included manager (e.g., providing time reminders, reducing off-task behaviour) and formative assessor, in which, as Shekhar put it, 'I always try to dip into their notebooks' to assess progress. Four PTs often provided *procedural feedback*[9] to the whole class in a louder voice, particularly if a common error or misunderstanding was observed, but they never singled out learners as they did this. Five PTs often switched rapidly between these roles. In the following extract, Shekhar combines manager, assessor and tutor in rapid succession:

EXTRACT 7.12: Shekhar, Grade 9

T: (guiding a student engaged in a card
categorisation task) *Think before placing.*
Think before placing. Take your question *into*
consideration. Set aside those shoes. Done?

S1: Yes, sir.

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[9] Feedback offered to learners during an activity (see Section 6.7.6).

> T: *Okay. Let it be. Let it be. Let it be. Okay, look here.* (encouraging them to stand back) OK. *Keep it as it is. Don't* change *it.* (moves back to middle of class) *Where's yours?* (girls indicate) *Hurry up, come here.* (then to a different group) *Is yours done? Where are your* questions? OK.

On one occasion, Dipika provided support to fourteen of twenty-six groups in nine minutes, and Nurjahan gave support to fourteen students in eight minutes. A key advantage of this active monitoring support for the PTs was its confidentiality to learners (see Section 6.7.6). As Shekhar noted, referring to his large class contexts: 'It takes courage to ask [about] a difficulty or speak a few words in the class.' Other reasons for active monitoring included to promote on-task behaviour and concentration, to build rapport and confidence and to provide differentiated support.

In contrast to these practices, on the few occasions when learner-independent activities were observed among PTs' peers, the teacher in question usually remained at their desk, waiting for learners to finish. The only monitoring role observed among them was that of manager; this role was used either to hurry them along or provide warnings to learners, sometimes for attempting to collaborate: 'Who is talking? Speak English in class' (personal field notes).

7.5.7 Assessment and Feedback

Assessment practices observed among PTs were nearly always formative and usually fully integrated into their day-to-day teaching (i.e., assessment for learning; Leung, 2007) rather than discrete practices. Exceptions to this (i.e., discrete assessment activities) include Shekhar's use of quiz lessons at the end of units and the more summative progress tests that Dipika and Raju were required to administer.

The assessor and tutoring roles that many PTs adopted during active monitoring provided useful opportunities, both for assessment of learner progress and difficulties, and for feedback support that was individualised and differentiated. However, such activities were usually also followed by whole-class feedback lesson stages during which answers were discussed if complex or problematic, or checked quickly if not. In the following example, Dipika checked the answers to one activity in only 10 seconds, aware from her earlier use of the assessor role while monitoring that the learners had found it comparatively easy:

EXTRACT 7.13: Dipika, Grade 9

T: *Let's go.* Ready with the answers?

SS: Yes.

T: Big?

SS: Dinosaur.

T: Fearless?

SS: Tiger.

T: Dry?

SS: Desert.

T: Warm.

SS: Toast.

T: Done?

SS: Yes.

T: Now the next one.

As this example indicates, feedback typically involved teacher-led elicitation and confirmation of answers, or correction and occasionally remedial teaching if required, although there was some variation in the specific practices used during whole-class feedback. While eliciting answers, 'hands up' volunteering and teacher nomination of learners were more common than the whole-class responses of the type evident in the previous extract. The board was often used, particularly when answers required written confirmation or literacy levels were low. Sometimes brief answers were scaffolded into more detailed responses, and sometimes general advice or a recap was offered before moving on:

EXTRACT 7.14: Kuheli, Grade 7

T: Very good. So now we know the difference between possessive adjective and possessive pronoun, so if in your exam you have to identify, you would be able to do it.

Other strategies observed during feedback tended to be teacher-specific, including scaffolding answers via the board (Manjusha) and facilitating more critical discussion (Kuheli). Group presentations were common during Vinay's feedback lesson stages and also used occasionally by other PTs.

All PTs provided correction, both for written work (offered both during active monitoring and post-lesson correction of notebooks) and oral English

use, the latter focusing most often on pronunciation, lexical choice and grammatical errors and was offered through both direct correction and *recasts*.[10] Six PTs offered these corrections during both whole-class teaching and activity work, although two (Gajanan and Manjusha) avoided correction during whole-class stages for concern of undermining learner self-confidence, a point also recognised by others:

> If I say no, no, your answer is wrong, straight away, what happens is that others don't even try speaking in the class, so I have to listen to whatever is said by the students … they know that the teacher is ready to listen to me, whatever I speak, she is going to listen to me. (Dipika)

In contrast to non-expert peers, who were more likely to combine correction with criticism (e.g., 'it's your bad habit'; field notes), criticism was never observed among PTs, who instead demonstrated sensitivity through a range of means, including combining correction with praise, involving humour or simply by correcting swiftly and moving on:

EXTRACT 7.15: Gajanan, Grade 9
S1: (writes 'verds' on board) Verbs.
T: Verbs, OK. In the books there are verbs. (T spots mistake, approaches board with chalk, and quickly corrects it) That you wanted to write, no?

Peer correction, while not frequent, was also encouraged by several PTs, including through quiz activities, peer monitoring (see Figure 7.8; also Extract 6.8) and during whole-class feedback (see Extract 6.20).

7.5.8 Other Practices of Note

A number of PTs made use of a discourse practice common across India (Sarangapani's 'teachering device', 2003), South-east Asia ('oral cloze'; Martin, 1996) and sub-Saharan Africa (Chick's 'safe talk', 1996), discussed here as 'elicited choral completion' (also see 11.2.2), in which a teacher uses rising intonation towards the end of a sentence to elicit the last word or phrase from learners. Among PTs this had several uses, including to simplify question forms (see Extract 7.8), to encourage repetition of a key phrase and on other occasions as a more legitimate check of understanding:

[10] In language teaching, a recast is a correction offered by the teacher through reformulation, often weaved naturally into their responses to student contributions (see Goo, 2020).

Figure 7.8 Three learners provide peer monitoring support while Gajanan provides tuition to one learner (Grade 9)

EXTRACT 7.16: Dipika, Grade 10

T: Full form *of* US *is* USA. United States of…? (rising intonation)

T & SS: America.

T: *So* America *is a continent.*

There was evidence of learner training in study skills in four PTs' pedagogy, with Nurjahan especially linking this to opportunities to develop learner autonomy. Several provided advice regarding how learners should organise their study resources, particularly notebooks, what resources they should bring to school each day and advice for completing homework. Some evidence of learner training was also evident in classes that were new to the teacher, especially noticeable during observation visits occurring at the start of the academic year.

Four of the PTs regularly engaged in reading texts aloud (common across India), mainly during text interpretation (see Extract 6.13, where learners request this during negotiation) and two sometimes encouraged learners to read aloud as part of their literacy development.

Games were usually observed only occasionally in PTs' lessons, playing a regular role in the pedagogy of only two PTs, including Nurjahan's word-search game and Gajanan's use of guessing and mingle games (e.g., 'find your partner'). This avoidance of games was generally consistent with the espoused

preferences of most learners during focus group interviews; in all contexts except one, learners ranked 'plays games with students' lowest or equal lowest of ten qualities of a good teacher, often rationalising this by explaining that they could play games outside school whereas lessons were for study, which they perceived as separate from play (see Table 9.14).

While controlled writing tasks were common in the lessons of all PTs, extensive, free writing was only observed regularly in the lessons of two PTs and occasionally or rarely for four, although several stated that they made more use of writing tasks closer to end-of-year examinations.

Rote learning, often discussed as common in Indian classrooms (Government of India, 2020; Sarangapani, 2003), and seen in the lessons of several non-participant teachers, was not observed in the classes of PTs.

7.6   KNOWLEDGE

As well as having full, functional proficiency in other languages used in their local community and school, all participant teachers were proficient in English. If assessed on the Common European Framework of Reference (CEFR), they would likely fall within the C1–C2 range, with particularly well-developed lexical knowledge and reading skills in most cases.[11] For two PTs, lower levels of speaking fluency and occasional differences in verb agreement and article usage from standard Indian English (e.g., Sailaja, 2009) were noted during conversation, although their functional proficiency comfortably sufficed to provide appropriate input, instruction and support to their learners. The twenty-six non-expert teachers' English proficiency varied more, estimated at B1–C2 levels, although two teachers observed were noticeably lower. While there is no reliable data on English proficiency among Indian secondary teachers of English, Borg et al. (2022) collate evidence to suggest that in a number of states, the majority of English teachers are below B1 proficiency in English.

In several cases, it was possible to assess the extent of PTs' knowledge of English lexis through their ability to respond to learner questions or unplanned affordances during class (also see Section 6.8). For example, Kuheli translated or paraphrased low-frequency items such as 'squall', 'capsize' and 'thrice' upon request from her learners:

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[11]   This was confirmed for one, who scored C2 on an international test. While the CEFR constitutes an exogenous, arguably inappropriate framework for assessing proficiency in Indian English, in the absence of alternatives, the PTs, upon consultation, considered it an appropriate measure to adopt.

Figure 7.9 Shekhar often taught noun and verb collocations and set expressions (Grade 10)
Note. A single Marathi translation is present, top-left.
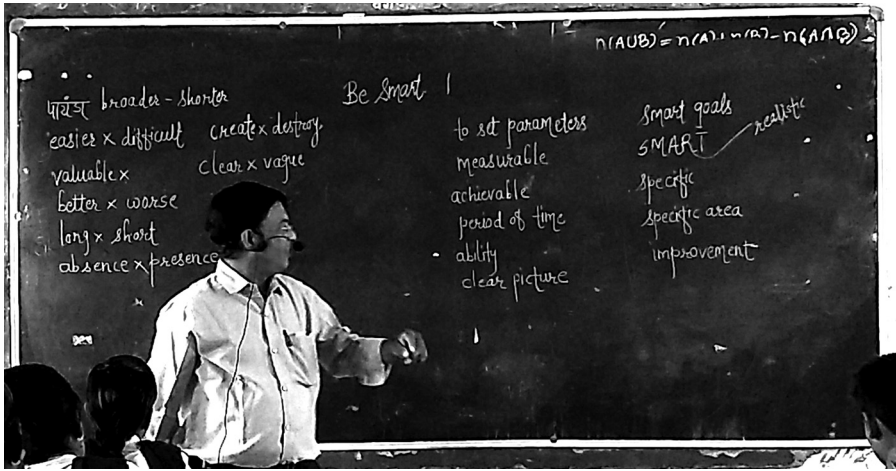
EXTRACT 7.17: Kuheli, Grade 8

S1: Ma'am (hand raised) 'Thrice' and 'flung'. What is
the meaning of 'thrice'?

T: 'Flung'? 'Thrice' means three times. Like two
times twice, three times thrice, and 'flung' means to
throw with a force, *chure phele deowa* [*throw away/to
the wind*].

And Raju was aware of permissible suffixes in response to learner questions
during a matching activity:

EXTRACT 7.18: Raju, Grade 6

T: This suffix '-ment' won't go with calm. So we have
to write calmness.

Evidence of creativity in activity types was one of several indications
of a well-developed PCK on the part of all PTs, including, for example,
Gajanan's use of concept mapping devices, Manjusha's creative ideas
for project work, Nurjahan's original strategies to pre-teach lexis and
Shekhar's creative use of bespoke chits for collaborative learning. Both
Shekhar and Nurjahan also regularly taught lexical chunks, set expressions
and collocations (see Figure 7.9) alongside discrete items, despite neither
being familiar with Lewis's lexical approach in language teaching (Lewis,

1993). This constitutes potential evidence of the independent development of their PCK. This well-developed PCK was also found to be fundamental to PTs' ability to negotiate and improvise in class. Occasions were observed when they responded to learner difficulties or confusion by providing impromptu, level-appropriate clarification in areas that they could not have planned, including improvised interactive reviews of neither/nor structures (Nurjahan), exclamatory sentences (Dipika) and auxiliary verbs (Gajanan).

While there was variation in PTs' ability to remember the names of individual learners, all demonstrated extensive knowledge of the prior learning, levels of English and needs (both affective and cognitive) of their learners as groups. This knowledge revealed itself in their practices, their reflections on specific learners during post-lesson interviews (discussed below) and also through specific strategies that they had developed to teach certain aspects of language – evidence of the close link between knowledge of learners and PCK.

PTs' knowledge of learners was also closely linked to their detailed knowledge of the curriculum, textbook and examination content. During post-lesson interviews several commented on future texts or activities in the textbook, correctly predicting learner difficulties with these, and also showing awareness of ideas for adaptation of textbook content, and knowledge of specific areas of grammar and lexis (e.g., 'pupil' in 6.8) that their learners had not yet studied.

Most had extensive knowledge of their subject area of the curriculum, informed by Master's degrees in English in all cases. They were able to clarify aspects of literary devices (often called 'figures of speech' in India) to their learners, and draw on both the MEL and prior schemata through the use of translation, explanation, comparison and analogy (e.g., Gajanan's comparison of an English poem to a Marathi song in one lesson). However, it was notable that only three exhibited a clear passion for literature itself, English or otherwise. Several also demonstrated a well-developed PCK with regard to literature studies, such as Manjusha's scaffolded teaching of rhyme schemes.

While gaps in PTs' subject knowledge and language proficiency were rare, they were noticed on occasion, such as a lack of awareness of how to pronounce low-frequency lexical items (e.g., 'martyr' and 'apprenticeship'), unsureness regarding whether certain affix combinations were correct (e.g., 'small-ness') and, for one PT only, spelling mistakes with lower-frequency lexical items (e.g., 'almont' for 'almond').

7.7 REFLECTION

Six of the eight PTs regularly demonstrated the ability to reflect[12] extensively and fluently on their practice, evidenced mainly through post-lesson interviews, but also informal discussions and longer interviews. The remaining two also reflected, but less extensively and required more prompting. Self-evaluations of lessons varied a lot among the PTs, yet all eight were always able to identify specific strengths and weaknesses during post-lesson interviews (see Section 6.9) and several were also able to assess achievement of specific intentions in detail (also see Section 6.9), sometimes differentiated to different ability levels. Differences between planned and taught lessons were often justified through reference to learners' challenges and needs, but also affordances, as Gajanan noted when discussing the photograph incident documented in Extract 7.10:

> Actually I had planned that I should write some words and then I had planned to brainstorm … with the help of a web [mindmap], but that girl, I could say very lucky that she was hiding that photograph, and I had two intentions there, to control the classroom, and to control it in a constructive way, for example, taking the same resource, the same photograph, so that she should have some personalisation, personal experience with that photograph … I tried to establish some connection with that photograph and that girl. (Gajanan)

When asked to reflect on the learning of an individual student in the class, those that were most self-critical were also more likely to choose a weaker learner and discuss in more detail the extent to which that learner participated and learnt, often with reference to specific interactions during the lesson (see Section 6.9).

Reflection was found to be closely linked to a number of areas of PTs' professionalism, including their commitment to continuous learning (as a wider, professional reflexivity), the desire to receive 'feedback' from me, as a visiting observer (see below) and the challenges presented by isolation from like-minded professionals, which underpinned Vinay's belief that isolated teachers needed what he called 'introspection':

> …an effective teacher … should continue to read things and continue to experiment in the classroom. There is no need to take the feedback from others. You can experiment. … So this kind of introspection definitely helps the teacher to become an effective teacher, even alone. (Vinay)

[12] Defined here following Anderson (2020a, p. 480): 'conscious, experientially informed thought, at times involving aspects of evaluation, criticality, and problem-solving, and leading to insight, increased awareness, and/or new understanding.'

7.8   PROFESSIONALISM

A number of notable similarities among PTs with regard to their professionalism should be treated with caution, given that, in the absence of other reliable indicators of expertise, one of the criteria for selection of participants in this study was an active engagement in CPD and another was experience as a teacher educator. Thus, the fact that all eight had extensive experience as teacher educators, and all were noted to engage actively in their CPD should be considered results of this rather than findings of the study. These two selection criteria are likely also to correlate causally with other CPD-related findings, such as their participation in local, national and international teacher associations, and their enthusiasm for networking.

Setting these selection criteria aside, a finding of note within the professional domain relates to a difference in PTs' career paths to becoming a teacher. Several felt that their career choice was largely a product of destiny; as Shekhar noted, 'I feel I am not a teacher by accident. It was my passion that made me a teacher.' However, others, such as Vinay or Dipika, indicated that they had arrived at their profession as a second or third choice, only after other doors had closed or they had been steered in this direction.

Another finding of note was a notable catalyst in galvanising their identity as teachers and teacher educators, discussed by six PTs – the importance of specific training courses or workshops as transformative events. This includes Dipika's mention of two courses that caused her to take her work more seriously and enrol for an MA, several British Council training events for Gajanan, and both scholarships and shorter training courses for both Kuheli and Vinay:

> …my perception of language teaching has entirely changed after attending [RIE Bangalore].[13] So I started loving pedagogy instead of content and even throughout the ninety-day programme, I used to participate actively in all the classroom activities, going in for presentations, participating in group discussions and everything. (Vinay)

Perhaps the most notable similarity among the PTs in the professional domain was their strong sense of responsibility for their learners. It seemed to be an important causal influence on other similarities, and underpinned their motivation as professionals and their self-motivated commitment to

[13]   Regional Institute of Education.

professional development. This sense of responsibility was expressed on several occasions either through their belief in their duty to 'serve' their learners or through a perception of their learners as the primary evaluators of their work:

> We are here to serve the children. Let the children know that we are together, teamwork. (Raju)

> JA: Whose opinion is most important to you as a teacher?

> G: As a teacher, students' opinion. (Gajanan)

> S: An effective teacher is one who is with the students on his last day of his retirement, that's my belief, to die in harness.

> JA: What do you mean by that?

> S: Keep yourself busy till it's the last day of your job. Then you can proudly say that 'I was with my students'. (Shekhar)

This commitment to their learners was a potentially important motivational influence on their need to develop largely in isolation from other like-minded professionals for much of their careers; few had ever been observed teaching before my visit, and those that had been observed had received only cursory feedback, if any. This was likely why five of the PTs specifically requested 'feedback' from me on their teaching without my ever suggesting it:

> JA: …do you mean that it would be useful if I give you some reflections on your teaching?

> M: Yes, yes, because if you've observed some weaknesses, that is necessary for me as a teacher educator, as a teacher researcher, to grow, myself, and to understand me well. (Manjusha)

7.9 CONTEXTUALISING THE QUINTAIN

This chapter has presented detailed findings from cross-case analysis, primarily of the eight expert teachers of English in my study, but also of their non-expert peers as points of comparison. In so doing, it has uncovered some of the most important features of the 'quintain' of my research project – the expert Indian secondary teacher of English. So what has it revealed about this quintain?

With regard to cognition, clear evidence emerged of extensive subject and curriculum knowledge tied together through a generally rich PCK and awareness of learners' needs and backgrounds, as well as tendencies in most towards fluent, critical reflection on their practices. Strong beliefs, particularly in building learner self-esteem, engaging learners and ensuring learner understanding were mirrored in the classroom by close relationships of trust, evidence of enjoyment and regular positive reinforcement and encouragement, often supported by effective behaviour management practices to prevent disruption, particularly apparent among those PTs who taught large classes.

While there were clear differences in PTs' balance between languages used in the classroom, all were proactively inclusive of other languages (in contrast to many of their peers) and flexible in response to learner need, regularly translanguaging as they facilitated a gradual, scaffolded movement towards increased understanding and use of English among learners. Planning was observed to be ostensibly mental and fluent, although this also varied both among PTs and between lessons.

With regard to classroom practice, while whole-class teaching tended to dominate for most PTs, this was invariably interactive, involving questioning, elicitation and scaffolding techniques that built on learners' prior knowledge and linked closely to their lives and schemata. It was supplemented by the regular inclusion of learner-independent activities, both individual and collaborative, during which PTs typically engaged in active monitoring to provide individualised, responsive tuition, feedback and guidance. Assessment practices observed were primarily formative and typically integrated into both whole-class teaching and monitoring support. Lesson structure varied among PTs, although many had a small number of frequently used lesson shapes, most integrated regular review activities into lessons, and most engaged in regular negotiation of aspects of lesson content and activity dynamics with learners, improvising when appropriate to cater for emerging learner needs and challenges.

7.9.1 Expertise in Dealing with Southern Challenges

At the start of Chapter 4, a number of circumstances and challenges were identified that are frequently shared by teachers working across the global South. Many of these are present in the PTs' contexts, as revealed through the circumstances, anecdotes and beliefs documented above. This chapter provides useful insights into how the eight PTs overcame, addressed or at least mitigated many of these challenges through their pedagogic, interpersonal

and languaging practices. Four illustrative examples are provided here for the four areas of challenge[14] discussed in Chapter 4 – many more are evident in the text above.

Perhaps the strongest shared belief of the teachers concerns their emphasis on the importance of confidence building among their learners. This highlights a challenge that their learners face in combating low self-esteem, as revealed in the anecdote told by Nurjahan in Chapter 6 of the girl who was self-harming because she felt that she was 'of no use to anybody'. Particularly in their interpersonal practices, including the frequent positive reinforcement and encouragement of their learners, these teachers reduced and even inverted this low self-esteem, as Manjusha did when she positioned her learners as greater experts than her (Extract 7.2). Shekhar's motivational advice to his learners (see Extract 7.1) and Nurjahan's metaphors for success in adversity (Extract 6.3) served similar ends.

With regard to challenges that the teachers face, these came through in their discussion of their professional practice, particularly the struggles that they experienced, firstly in accessing education and then in becoming teachers. This is revealed through Nurjahan's discussion in Chapter 6 of how she needed to become an autonomous learner at an early age – a need that, in turn, influenced her own teaching practices. The fact that, despite their extensive professional development, several PTs had never before been observed in their own classroom is also notable, and necessitated alternative learning mechanisms such as what Vinay calls 'introspection', his independently developed reflective practice that bears many similarities to Schön's reflection-in-action (1983). Also, the finding that these eight expert teachers drew motivation from their sense of responsibility to their learners indicates a potentially causative influence on why they persevered in the face of this professional isolation, and may be a critical prerequisite, perhaps, for the development of expertise in challenging contexts.

Concerning challenges of the school itself, these also exerted influences on the participant teachers' beliefs and practices. An example of this is the large classes that several of them taught, which presented specific challenges with regard to individual learner support, behaviour management and teacher workload. For example, several PTs exhibited a clear awareness of the fear that their learners often experienced when called on to respond to teacher questions

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[14] To recap, these are (1) challenges the learner faces, (2) challenges the teacher faces, (3) challenges within the school environment and (4) challenges of the wider educational system.

during whole-class teaching – a fear that inevitably increases with class size – and this awareness underpinned their choice to engage in active monitoring so that learners could ask questions without losing face in front of peers. Likewise, the strong shared beliefs in constructivism and peer-teaching among the PTs influenced the comparatively high instance of collaborative learning observed, a strategy that may be particularly important in larger classes, where a teacher's ability to support individual learners is necessarily more limited. Another challenge typically occurring in large classes concerns the higher likelihood of off-task behaviour and disruption among learners. Both the shared belief in the need to make lessons engaging and the practices consistent with this belief, such as the frequent use of humour (Extract 7.3), the interactive questioning during whole-class teaching (Table 7.3) and their ability to draw upon learners' interests and schemata (Extract 7.10), were all found to help mitigate this common behavioural challenge of large classes in varied ways.

Concerning challenges of the educational system, a shared belief that came through strongly among the participant teachers was their recognition of the importance of preparing learners for examinations, which, paradoxically, often had little to do with language learning itself. It was something they did to safeguard the educational future of their learners (see Kuheli's quote in Section 7.1 and Dipika's in Section 8.2). The decision that most took to prioritise core curriculum content and exam training over certain language use skills (e.g., monolingual English speaking practice), even when this conflicted with other beliefs they held, was revealing in this regard. It is noticeably out of kilter with dominant best practice discourse within academic and practitioner communities (e.g., Harmer, 2015), a discourse that disseminates largely from privileged contexts in the global North (Holliday, 1994; Kuchah & Shamim, 2018).

These four examples help us to gain important insights into how expert teachers working in the global South deal with the multiple challenges that they face through their innovative practices, strategies and attitudes. While some of these are broadly consistent with best practice notions in the global North, others are not, yet all are explainable as a result of these contextual challenges, and arguably more sensible than exogenous alternatives whenever these differ. It is insights such as these that have rarely, if ever, been previously revealed, due to the almost complete prior absence of research into teacher expertise in the global South.

This chapter has focused primarily on similarities across the eight cases studied in order to highlight features that may be key to their shared expertise and success in their practice. As such, it has necessarily glossed over many

important differences among them. However, to understand the quintain fully, as Stake (2006) observes, we need to make sense, not only of such similarities, but also of variations in its manifestations. These variations are the subject of Chapter 8, and will offer insights into the more specific causal factors shaping each unique case, and dissuading us from the temptation to simplify and view Indian, or Southern teacher expertise monolithically. Only by understanding both similarities and differences among expert teachers can we truly understand teacher expertise itself.

8   Diversity in Expertise

Where Is There Difference and Why?

It seems probable that expert teachers become more 'individual' as they become more expert. By individual is meant more distinctive, more particular in behaviours and more fluent in performance so allowing more mental space for subtle action.

<div align="right">(Goodwyn, 2011, p. 131)</div>

Given the differences in their personal backgrounds, teaching contexts and curricula, the numerous commonalities among the eight expert teachers discussed in Chapter 7 constitute important findings. These commonalities were particularly evident in their beliefs, their relationships with learners and their professional practice. It was also possible to identify global similarities in some aspects of classroom practice (e.g., use of activities and active monitoring) and languaging practices (e.g., multilingual inclusivity), particularly evident when they were compared with non-participant teachers working in comparable contexts. However, especially in the areas of pedagogy and languaging, a number of important differences were also documented and often found to vary clinally among participant teachers, a finding consistent with the limited number of comparative case studies of expert teachers that have offered some discussion of differences among participants (e.g., Milstein, 2015; Sorensen, 2017) albeit not systematic analysis.

This chapter explores these differences in an attempt to answer the more elusive, yet valuable question: why do these differences exist? It does so through the comparison of two key variables that, when contextual factors were also considered, were able to account for the majority of the most apparent differences observed among the expert teachers, evidence of what might be called

contingent causality – not robust enough to be confirmatory, but both evidenced and plausible as means to understand the diversity of practices found.

8.1   FRAMEWORK FOR ANALYSIS

During the cross-case analysis phase of my research, I noticed that there seemed to be two broad areas of differences between the teachers, particularly with regard to their pedagogic practice. Variations in these two areas seemed to be clinal, both among the PTs and the twenty-six non-participant teachers of English who were also observed. I found these areas of difference useful as organisational constructs; between them, it was possible to account for the majority of variation in teaching practices observed.

The first of these areas of difference is what I have termed their *conception of subject* (CoS) – their understandings of what 'English' is, as manifested both during our discussions (espoused theories) and through their classroom practice (theories-in-use; Argyris & Schön, 1974). CoS seemed to vary clinally between those participant teachers who tended to both view and teach English more as a 'subject' (TEaS), and those who viewed and taught it more as a 'language' (TEaL). Interestingly, this distinction is sometimes mentioned in the discourse on English language teaching in India, with national policy documents typically criticising TEaS and prioritising the need for 'teaching language rather than content' (NCERT, 2011, p. 46). It also emerged as influential in preliminary exploratory research conducted for this study investigating the views of Indian teachers of English concerning effective teaching (see Anderson, 2020d; discussed below).

The second area of difference might be termed the *degree of control* (DoC) that participants exerted on aspects of the learning process, classroom interaction and learner behaviour. DoC was observed to vary substantially among participant teachers, from those who retained a much higher degree of control to those who were more likely to offer or cede this control to their learners.

When considered within their subject field (English language teaching), CoS and DoC bear similarities to Bernstein's key constructs of *classification* and *framing* respectively, both of which he perceived could vary clinally from strong to weak (e.g., 2000, pp. 5–7). While I will discuss them primarily as CoS and DoC below (constructs that arose primarily during data analysis within my research), my discussion of them will also explore relevant aspects of Bernstein's sociology of education, which both Sriprakash

Figure 8.1 Key differences among participant teachers: The CoS/DoC field
Notes: This diagram shows only those themes of participants' practice where there was clear divergence. Grey area indicates the range of distribution of non-participant teachers (extending above and to the right of the shown area – grey arrows). ToT: time on task; BM: behaviour management; TLMs: teaching/learning materials; MEL: more-enabled language.
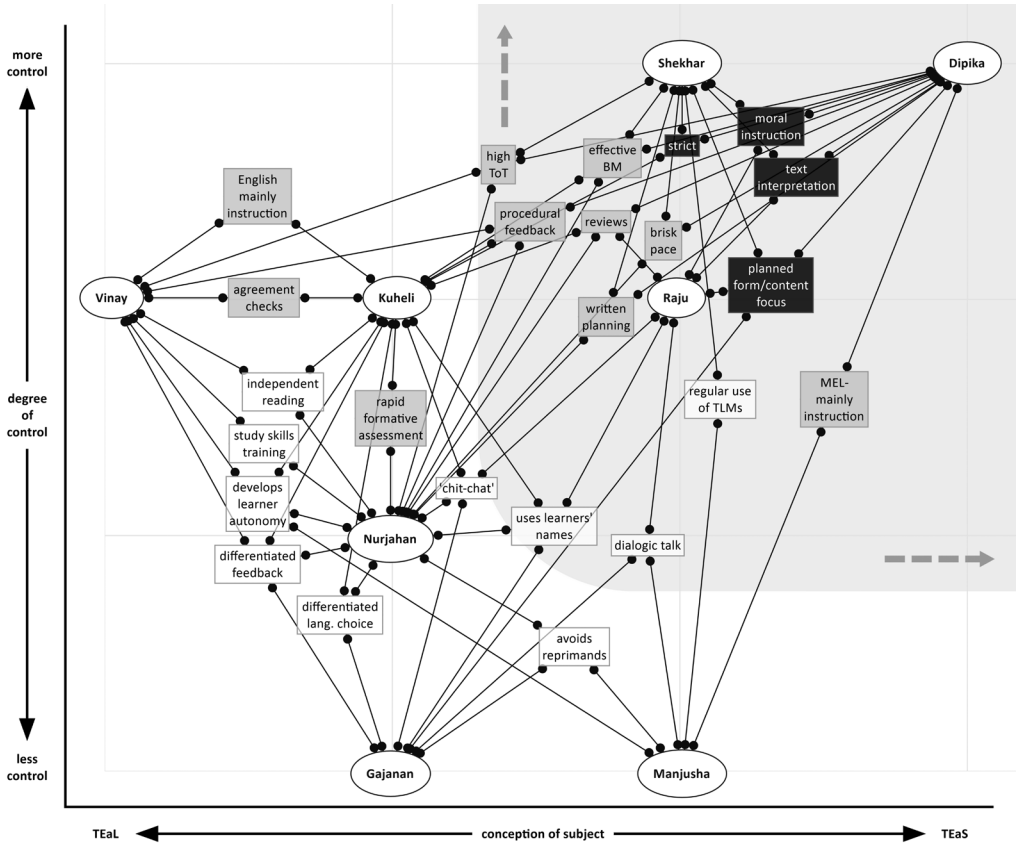
(2011, 2012) and I found useful for understanding pedagogic variation within India's classrooms in relation to the wider international discourse on quality in education.

Figure 8.1 presents CoS and DoC as the clinal axes for a two-dimensional field on which I have plotted the estimated position of each participant teacher (scoring points were from 0 to 3 for each 'variable') to offer a graphic portrayal of the diversity among them that this chapter explores. On the X axis (CoS), practices varied from those of Vinay, who was observed to teach

English more as a language for communication, to those of Dipika, who taught English more as a body of declarative knowledge. Other participants were perceived to vary between these two positions. For comparison, the CoS of the twenty-six non-participant teachers of English observed tended much more towards the TEaS end of the continuum, with, in some cases, a CoS that was stronger than Dipika's (represented by the grey-shaded background, which continues to the right of the scale shown). No non-participant teachers were observed who taught English as language to the same extent that Vinay did. On the Y axis (DoC), practices varied from those of Gajanan and Manjusha, who were both observed to exhibit comparatively little control over their learners and the learning process, to those of Shekhar and Dipika, who both exhibited much more control. The DoC exhibited by non-participant teachers was, on average, perceived to be closer to Dipika's and Shekhar's, although many exhibited consistently more control than either of these two (the grey background area continues beyond the uppermost margin of the field). No non-participant teachers were observed who exhibited as little control as Gajanan or Manjusha. Thus, an initial observation of interest is that, on average, these expert teachers tended more towards teaching English as a language with less overt control over learning (i.e., lower scores on both axes) when compared with their peers. However, within these broad tendencies, there were, nonetheless, important differences among the participants that constitute the primary focus of this chapter.

Mapped onto the CoS/DoC field are those themes where significant variation was observed among participant teachers. Themes that are often interpreted as more 'learner-centred' in the international discourse on pedagogy (see Bremner, 2021; Schweisfurth, 2013a) occupy pale text boxes, and those usually understood to be 'less learner-centred' are in dark boxes. In agreement with Schweisfurth (2013a, pp. 10–11), I avoid the term 'teacher-centred' as unhelpful; the term 'teacher-led' (for specific activities or lesson stages) is preferred, where appropriate. Themes that do not obviously relate to this distinction are in mid-grey boxes. Placement of theme boxes is approximately equidistant between teachers who shared the theme, with exceptions made for readability. No assumption is made here that learner-centred practices are necessarily desirable or better (see Alexander, 2009; Tabulawa, 1998, 2003), but the distinction, which is a familiar subject of discussion in the discourse on quality in pedagogy (see Bremner, 2021), serves an initial filtering role that enables us to detect broad patterns among the differences identified.

It is important to note that the themes that were shared by the majority of participant teachers are not shown here (e.g., use of activities, collaborative learning, active monitoring and whole-class teaching; see Chapter 7). If added, such themes would complexify the picture significantly, eschewing the potentially misleading interpretation of Figure 8.1 that teachers' practices varied simply between more and less learner-centred. All participant teachers were distinctly learner-centred in a number of ways (e.g., in their interpersonal practices, individualised feedback and inclusivity), and all, at times, also engaged in teacher-led instruction and management of learning.

8.2 CONCEPTION OF SUBJECT: THE TEAS-TEAL CONTINUUM

The continuum between teaching English as subject and teaching English as language reflects the spectrum of participant teachers' interpretations of their object of instruction – 'English', both in their espoused theories (their beliefs and perceptions of their practice) and in their theories-in-use (the more implicit theories underpinning their actual practice) (Argyris & Schön, 1974), although the interaction between these was sometimes complex (see below). As such, within Bernstein's sociology of education, this TEaS-TEaL distinction can be seen as an issue of 'classification' at the level of the 'pedagogic recontextualising field' (2000, p. 33) that, Bernstein argues, teachers have some, but not complete control over, at least in some contexts.[1] This was true for the participant teachers, albeit to varying degrees (discussed below).

A TEaS orientation views English as similar to other subjects on the curriculum; a body of explicit/declarative knowledge that learners acquire, and then reproduce in examinations – a type of 'performance model' in Bernstein's framework (2000, p. 44):

> a performance model of pedagogic practice and context places the emphasis upon a specific output of the acquirer, upon a particular text the acquirer is expected to construct and upon the specialised skills necessary to the production of this specific output, text or product.[2]

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[1] Bernstein (2000) uses the term 'pedagogic recontextualising field' to describe the domain in which other (e.g., official) discourses on education are selectively appropriated, relocated and refocused by teachers and other 'pedagogues', recognising that autonomy for such recontextualisation varies in different circumstances (p. 33).

[2] 'Text' is used by Bernstein to refer to 'anything which attracts evaluation' from pedagogues (2000, p. 18).

Given that English teaching in India involves the teaching of both literature and language (e.g., MSBTPCR, 2018; NCERT, 2006), a TEaS orientation tends to involve a stronger focus on English literature, which is more easily amenable to a performance model. This may include, for example, teaching learners to identify (or memorise) the rhyme schemes of different poems or to identify literary devices ('figures of speech' in Indian English language teaching; ELT) such as metaphor, apostrophe or symbolism in either poetry or prose. TEaS orientations might also place emphasis on learners' memorising the content of set texts or answers to commonly asked exam questions as appropriate pedagogic practice, as seen in several non-participant teacher observations. While the primary aim of TEaS orientations in India seems to relate to improving exam performance, it should also be borne in mind that literary texts are often perceived as appropriate scholarly works to read and commit to heart; the Maharashtra syllabus (MSBSHSE, 2012, p. 158) mentions 'reading good literature' ('good' is unqualified) as an objective under 'personality development' at Grades 9 and 10, consistent with an English Language Arts, rather than a language teaching (TESOL) perspective, and also closer to Kramsch's (2002) foreign language (FL) learning, as contrasted with second language (SL) learning.

In contrast to this, a TEaL orientation involves a primary focus on the acquisition of English as a communicative system, with an awareness of its potential future utility in work and social contexts; a 'competence model' in Bernstein's framework (2000, p. 45), analogous to the 'communicative competence' of communicative language teaching (Canale, 1983; Hymes, 1972) and closer to Kramsch's (2002) SL learning. It is more likely to prioritise the practice of English language skills (reading, writing, listening and speaking) through meaning-focused tasks and activities with instruction on lexis and grammar typically integrated closely into such skills practice.

Thus, while a TEaL orientation seeks to prioritise the development of the underlying linguistic competence of the learners, which, in time, may enable them to answer exam questions on grammar and literature as a secondary outcome, a TEaS orientation typically seeks to prioritise exam performance through a focus on the declarative knowledge that examinations test while also developing certain aspects of English language competence as a secondary outcome. The TEaL-TEaS distinction was evident in earlier research I conducted on the beliefs of Indian teachers of English within one teacher association (Anderson, 2020d), with evidence of both TEaS and TEaL orientations among respondents' espoused theories. In the following

example, a respondent prioritises TEaL initially and then shifts towards TEaS subsequently:

> English is a language; and not a subject to teach, learners need skills (LSRWC) first then gradually to develop aesthetic sense towards literature. (p. 15)

While the international literature on language teaching typically promotes a TEaL perspective consistent with the currently dominant communicative paradigm (also supported by some Indian policy documents; NCERT, 2006, 2011), it would be an oversimplification to dismiss TEaS as inappropriate practice, at least from a contextually sensitive perspective (see Kramsch, 2002). Insomuch as all participant teachers' learners achieved outcomes that they, their parents and the schools valued most (i.e., higher than average exam pass rates for their districts), both of these approaches can be seen to be effective, constituting different means to a currently widely prioritised end in India – appropriate learner 'achievement'.

A brief comparison of Dipika and Vinay with regard to CoS offers insights into both the extent of difference among the participant teachers (as these two were the most divergent) and also into how contextual challenges, constraints and affordances, as well as personal beliefs, influenced these differences. It should be kept in mind that their conceptions of subject, while different, are not at the poles of the continuum. I observed non-participant English teachers across India whose CoS seemed to be more TEaS-oriented than Dipika's, and in other contexts around the world I have observed teachers whose approaches were more TEaL-oriented than Vinay's.

8.2.1 Dipika's Approach

Dipika's approach, while not defined solely by her TEaS orientation, was strongly shaped by it. In her large classes (averaging 52 students) of often disadvantaged urban learners (the school is located on the edge of a large slum), she taught English mainly as a written language, and mainly through Hindi as the most widely shared language among her learners and the dominant school MOI. She focused on the English they needed for exam performance, including text comprehension and familiarity, building of lexical resources,[3] and developing their ability to complete exam-type exercises and short written responses to items that tested their explicit awareness of grammar, literary devices, lexis and basic literacy.

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[3] Her learners had extensive lexicons averaging 1,900 words in one of her Grade 10 classes.

The most apparent influence on her TEaS orientation was the autocratic, top-down structuring and monitoring of teaching procedures implemented by the society[4] that ran hers and several other government-aided schools in her city. Dipika was required to progress through a non-negotiable scheme of work at a prescribed pace, meet the demands of extensive, compulsory unit tests (essentially mock examinations) every eight weeks and make primary use of exam-oriented workbooks rather than the state-approved textbooks, a practice that Dipika was sometimes critical of:

> In our institution they tell us to use the workbook because it is exam-based … they are not worried about what a child learns, they want results from the teacher. Even if the child is very good in reading English or writing English and he is not scoring good marks, then he is of no use to them … and for good results we have to follow the examination pattern, which is easier in a workbook. (Dipika)

This constitutes a clear example of what Bernstein would describe as a lack of teacher 'autonomy' in the pedagogic recontextualising field (2000, p. 33). Yet despite criticisms of this exam-oriented approach, voiced by several teachers, support for it was also found to be widely distributed in complex ways across the school community, constituting a *habitus* of sorts (Bourdieu, 1977) that her learners and their parents also embodied as well as her superiors. Evidence to support this claim comes from a focus group task I presented to learners in which they ranked ten qualities of a 'good teacher'. Dipika's learners, on average, ranked 'helps us to prepare for exams' equal second (the highest ranking among the learners of all eight PTs). This strong performance orientation was also emphasised by their parents, whose jobs included rickshaw drivers, tea wallahs and cleaners, during focus group interviews (also see Borg et al., 2022, p. 39). Perhaps most interesting was how Dipika's own personal beliefs also accommodated this TEaS orientation to some extent, having developed over the 24 years she had been working in this school. While the above quote reveals her concerns with the singular exam focus, she also revealed a deeper awareness of the need to respect it, not simply because it was mandated by the school, but also because of a sense of responsibility to safeguard her (often vulnerable) learners' education and future:

> There are students who come to me and say we don't like English, we are not going to pursue it any further, that I am going to be a vendor. What is the use of learning English? So then I have to make them understand that, see this is an

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[4] Registered societies are one of several types of not-for-profit entities recognised in India.

essential subject … even if you want to become a vendor, you have to pass 10th standard, so please, for the sake of just passing this exam, be attentive in the class and you'll see that it is going to help you in the future. (Dipika)

Nonetheless, through her extensive professional development and experience as a teacher educator, Dipika was very much aware of alternative approaches to teaching English, particularly those that were more TEaL-oriented and prioritised the use of English as the language of instruction and classroom interaction. As a result, there was evidence of conflict in her belief system. She reflected on one occasion, with regard to her Hindi-mainly languaging practices, that this was 'the wrong way of doing things', recognising that she could not practice what she preached as a teacher educator, which was more consistent with a TEaL perspective:

Sometimes I feel guilty about [teaching in Hindi] … when I take trainings … I give them the points that yes, this language can be taught very easily, and here in my school itself I am a teacher who doesn't teach in English, so that thing hurts me a lot. (Dipika)

8.2.2 Vinay's Approach

Vinay's TEaL approach involved a range of personally developed task types to focus his learners on comparatively autonomous interaction with, and production of, meaningful discourse. His 'processing tasks', project work activities and timed silent reading tasks required learners to work (often collaboratively) to process and transform texts in complex ways (e.g., turning a short story into an imagined dialogue, or writing a 'speech' or 'report' based on a newspaper article). Lessons were predominantly activity-centred, punctuated more often by spoken presentations by learners than by teacher-led input. During learner presentations, Vinay's feedback usually focused more on the meaning than the form of their texts. His interaction with his learners, while often translingual (see Extract 7.4), involved mainly English, and he also provided English listening opportunities for learners through the use of audio-visual material on the school's only functioning data projector. As a result, his learners' skills competence developed gradually and holistically and any focus on exam tasks was usually delayed until the final trimester of the academic year.

Vinay's approach, like Dipika's, can also be seen to result partly from contextual influences. These include somewhat smaller class sizes (averaging 32 students), a state curriculum that included an arguably more

progressive focus on 'discourses' (SCERT Telangana, 2018), and – largely because of his status as a leading teacher educator in the state – a lower level of regulation of his teaching from school administration than his colleagues, which allowed him greater autonomy (including in the pedagogic recontextualising field). While Dipika was expected to reach specific syllabus benchmarks, measured through standardised tests twice a term, Vinay had the freedom to build his learners' English language competence gradually over the academic year. The greater autonomy that he enjoyed allowed for a wider range of interests and influences to shape his eclectic approach than his local colleagues, all of whom taught English much more as subject. Perhaps most important among these influences was Vinay's extensive and atypical professional development community, facilitated by a strong interest in ICT that enabled him to network extensively online with both national and international colleagues, leading to, among other opportunities, a Fulbright Scholarship visit to the US in 2017. Other such influences include his 'introspection' (i.e., reflective practice) that enabled him to learn from his teaching in the near-complete absence of institutional CPD support, and his determined personality that gave him the confidence to believe that his unique approach was appropriate for his learners, despite often very different perceptions among those around him. At times, even some of his learners disagreed with his approach, revealing only limited approval for the autonomous collaborative learning he expected them to engage in.[5] As such, his practices had been shaped by a very different set of influences when compared to Dipika's – less a locally dominant habitus and more a wider network that he had actively sought out. While often more innovative, Vinay's pedagogic approach was largely consistent with current dominant discourse in the wider communicative language teaching community (rare in Indian ELT; Anderson, 2020d), and he revealed little interest in either English literature or explicit language instruction:

JA: Is language learning different from other types of learning?

V: Sure, definitely … while teaching language we focus on making them listen and understand, read and understand, speak and write, so the content of that lesson is not important. (Vinay)

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[5] In the focus group task on the ten qualities of a good teacher, Vinay's learners ranked 'includes pair and groupwork' in second last place on average – one of the lowest rankings among the eight PTs.

8.2.3 The CoS Continuum

Vinay's and Dipika's conceptions of subject constituted the widest points of reference on the CoS continuum. The six other teachers were assessed to fall between them on this scale, being more likely to combine, or balance aspects of TEaS and TEaL. Shekhar and Raju both used more English than Dipika, and both believed that learners learn English predominantly through 'exposure' – by listening to, and interacting with, the teacher, as well as texts. Yet they both shared with Dipika a strong tendency towards whole-class interactive teaching – often with an exam focus – and text interpretation. Manjusha believed more strongly in TEaL than these three. However, the comparatively low literacy levels among her learners led her, like Gajanan, to focus more on foundational literacy skills for English than whole-text work or oral skills. She also engaged in text interpretation, but less so, and sometimes included more meaningful processing tasks similar to those of Vinay. Kuheli, Nurjahan and Gajanan all taught English predominantly as language; they used it as the main language of the classroom, engaged learners in meaningful spoken interaction in English, and, in the case of Kuheli and Nurjahan, like Vinay, they regularly provided independent reading opportunities for their learners. Gajanan did this less often due to the lower proficiency of his learners; instead, he sometimes turned text interpretation into teacher storytelling, for example.

It is notable that the TEaS–TEaL continuum also correlated partly to a documented difference in participant teachers' languaging practices – the overall proportion of their learners' more-enabled language (MEL; see Table 7.1) in their classroom discourse (see Figure 8.2). The two participants whose use of MEL resources was highest (Dipika and Manjusha) taught English more as subject and the two for whom such resources were lowest (Vinay and Kuheli) taught it more as language, while those in the middle used median quantities of the MEL (24%–47%), although the correlation was only partial; the balance was influenced both by DoC and other contextual factors, discussed below.

8.3 DEGREE OF CONTROL

The term 'degree of control' (DoC) is used here to describe an amalgam of three control-related elements that participant teachers actively influenced. The first of these was their management of learner behaviour, which varied from 'strict' (here defined as a low tolerance for off-task behaviour)

Figure 8.2 Participant teachers' MEL use proportion mapped onto the Cos/Doc field
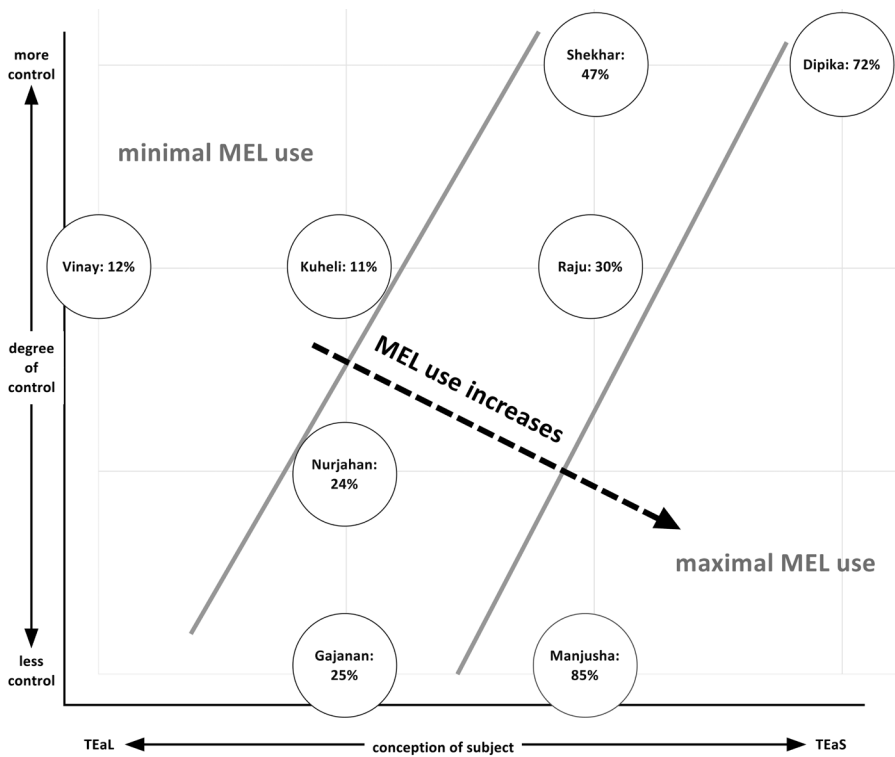
to 'lenient' (higher tolerance). The second was the extent to which they exhibited primary control of short-term schemes of work, varying from teacher-controlled to negotiated – in the latter, there was a higher incidence of teachers consulting learners about, for example, lesson content, activity choice, interaction pattern, homework assignments and deadlines. The final element involved their shaping and management of classroom discourse, which varied from a higher quantity of teacher-controlled sequences, frequently involving initiation–response–feedback (IRF) exchanges (Sinclair & Coulthard, 1975) and learners responding in English, to evidence of more dialogic interaction, with learners asking more questions, sometimes initiating conversations unprompted, or even making jokes. The three elements varied fairly independently of each other among the participant teachers, yet all concern issues of control that can be seen to relate to Bernstein's (2000) construct of 'framing', which 'is about *who* controls *what*' (p. 12, italics in original), albeit with somewhat different constituents and relations

appropriate to the context and subject focus. Bernstein notes that 'Where framing is strong, the transmitter [teacher] has explicit control over selection, sequence, pacing, criteria and the social base', also noting that the varied rules of framing 'can vary independently of each other' (p. 13), evidenced in research discussed by Morais (2002).

In the case of Shekhar, his unquestioned authority as teacher and the respect that his students showed him meant that behaviour management interventions were rarely required, and thus rarely evident, although on several occasions when minor disruptions occurred, learners received brief, yet stern warnings that required no repetition. He maintained almost complete control over schemes of work with only one instance of minor negotiation noted. Classroom discourse was IRF-dominant, with him both initiating and concluding almost all interactions, even if these were, at times, playful as in the following quiz activity:

EXTRACT 8.1: Shekhar, Grade 9

T: Second group. What does tea contain? (students confer. T leans forward to group and chuckles) *Time is passing.* Half time is over. Question: *What does tea contain?*

S1: (starting to laugh) *Nice sugar?*

T: (also laughing) *Nice sugar.* That's not the answer. *Your time is running out.*

S1: Thiamine, coffee.

T: Thiamine and?

S1: (self-correcting after peer prompts) Caffeine.

T: Thiamine and caffeine is the correct answer.

This led to my assigning Shekhar the highest DoC score among the participant teachers. I perceived that Dipika merited a similar score, due primarily to her comparatively strict behaviour management, necessitated by the higher incidence of learners challenging teacher authority in her large classes comparative to others. Her discourse was also primarily IRF-dominant, although she was observed, on five occasions, to negotiate aspects of lesson content with learners.

At the other end of this scale, Gajanan and Manjusha shared a philosophy of 'no fear', and an avoidance of both punishment and corrective feedback; both felt the latter may discourage learners from contributing to classroom discourse. Manjusha's belief in the natural 'hustle-bustle' that results from

learners 'learning with their natural surroundings' and Gajanan's tendency to subvert the normal teacher-student hierarchy and negotiate frequently with his learners were testament to their weak framing of hierarchical rules (Bernstein, 2000). Both engaged in more dialogic interaction with their learners, who often initiated interactions, argued, joked and expressed their feelings in any language, as in the following example in which a learner spotted a classmate breaking the rules of a revision game:

EXTRACT 8.2: Manjusha, Grade 8

S1: (seeing S2, Jyoti, with her textbook open, pointing) Oh madam! *She is reading from the book*! Jyoti! (inaudible)

T: *Yes*? (turns round and starts to laugh, approaching S2).

S1: *So…* (inaudible; S2 closes her book)

T: (still laughing) *Now close it. Now close it everyone, where you wrote in the last two or three rounds, close it everyone. Close all* notebooks. *Do it!*

S2: *Why?*

T: *Close it.* (smiling)

S2: *You mean tear it?*

T: *No, just close it. Why would I tell you to tear it? Close it. Closed?*

S2: *Yes.*

Both Manjusha and Gajanan cultivated a parental rapport in class that created a homely environment for learning. Yet both also sacrificed certain advantages of stricter approaches to behaviour management, such as the ability to get silence and attention more quickly, the need to spend time managing disagreements between learners, and, at times, a slower pace and less time on task as a result; their approaches were feasible in their comparatively small classes (both averaging 23 students), compared to the much larger classes of Dipika (52) and Shekhar (42).

Nurjahan's highly personalised approach often exploited affordances for friendly chit-chat and regular jokes with learners, although such dialogic interaction was interspersed with periods of IRF exchanges at certain lesson stages. She engaged in more negotiation than all other participant teachers.

Yet, while her espoused belief in avoiding punishment was consistent with her practice (only on one observed occasion did she threaten serious sanctions; see Section 6.4), the larger classes she taught and the challenging behaviour of some of the learners necessitated the careful use of varied behaviour management strategies that had evolved through trial and error; as such, she was less lenient as a teacher than Gajanan, Manjusha or even Raju, who all worked in smaller classes. Nonetheless, her use of such strategies meant that most of her lessons tended to progress with minimal disruption (similarly to Shekhar's), and there was a much higher time on task and pace observed when compared to Gajanan's and Manjusha's classes.

Vinay, Kuheli and Raju were all assessed at approximately the same (fairly high) degree of control, albeit for different reasons. In the case of Kuheli, her behaviour management – even by her own admission – was 'strict', and the high standards she expected of her learners also included quite specific expectations regarding rules and behaviour in class. However, she shared Manjusha's and Gajanan's parental rapport and playful personality that led to some lesson stages involving more dialogic discourse, while others involved prolonged IRF sequences. Nevertheless, negotiation was frequently observed in ways that were similar to Nurjahan's use of this strategy:

EXTRACT 8.3: Kuheli, Grade 9

So, you people tell me what would you like to do? I mean should I start a new chapter, or would you like to talk about grammar, practice grammar. You tell me. What would you like?

Despite his caring nature, Raju seemed to be a naturally authoritarian teacher, with emphases on moral guidance and whole-class direct instruction that led to fairly visible behaviour management, particularly in his Grade 10 class, where a number of the male learners were sometimes seen to challenge his authority. Yet, due to his classes being smaller than all other participant teachers (averaging just nine learners), he was more easily able to engage in dialogic interaction with them, often receiving frequent questions, requests and suggestions from them, and negotiation was noted on several occasions. Finally, Vinay offered probably the greatest degree of autonomy to his learners in the class, requiring them to work independently in groups for large periods of the lesson, suggestive of comparatively low levels of control. Yet there was little negotiation about what was to be done, or how; he retained

complete control over schemes of work (including deadlines for project progress) in his lessons:

EXTRACT 8.4: Vinay, Grade 9

T: OK. Again, sit in groups and finish the remaining task. Yesterday you had written only interview questions, and you had to write the conversation between the snake and you, and you had to update your questions, and textual questions, completed, eight, four, only four, so all groups completed that, writing answers to the questions. *Did all groups read yesterday?* OK, then two tasks, updating your interview questions…

S1: And conversation…

T: And conversation between the snake and you. Quick, sit in groups… If you are convenient you can sit there in the benches also, one group in one bench, like that.

At times, he had to impose his will on his learners when they requested more traditional instruction in class, even (paradoxically) forcing them to engage in more autonomous learning or greater collaboration at times. During learner presentations, he could be quite strict in requiring other class members to be silent and pay attention; teacher–student interaction would take on a much more teacherly feel, with him providing significant feedback and correction (despite his espoused aim to focus primarily on meaning, see above) as well as praise.

It was, at times, challenging to categorise the eight teachers' diverse degrees of control on a simple scale, and Vinay, Kuheli or Raju could potentially be assigned the same score as Nurjahan if a different weighting of these three elements were adopted. Further, class size seemed to be a factor influencing DoC, with participant teachers in two of the three largest classes exhibiting higher levels of control (Nurjahan was the exception here), and two who had comparatively small classes (Manjusha and Gajanan) exhibiting the lowest levels (Raju was an exception), as might be expected. In this regard, Nurjahan's ability to manifest comparatively low levels of control in large classes is notable, potentially attributable to her strong focus on the interpersonal domain (see Chapter 6).

Once more, it is important to note that DoC scores assigned were relative to the participant teachers. My observations of twenty-six non-participant

English teachers indicated that most would probably score similarly to Shekhar and Dipika, although some would score higher due to more visible, occasionally oppressive, behaviour management and control of discourse. A small number would score more closely to Raju and Kuheli, possibly even Nurjahan, although none exhibited the very clearly anti-authoritarian behaviour that typified Manjusha's and Gajanan's lessons.

8.4 THEMES SHARED AMONG SPECIFIC 'CLUSTERS' OF TEACHERS

Here follows a brief analysis of the themes where significant difference was observed among participant teachers, as illustrated in Figure 8.1. When these themes were superimposed on the CoS/DoC field, it was found that the majority could be understood or 'explained' through the two continua, insomuch as they were often shared by 'neighbouring' teachers on the field, revealing common principles and pedagogic concerns.

The four themes that are arguably least learner-centred – often associated with more 'transmission focused' or 'didactic' practices (Schweisfurth, 2013a, p. 10) – cluster in the top-right corner of the CoS/DoC field, due to their being shared predominantly by Shekhar, Dipika and Raju, the three teachers who exhibited higher levels of control and taught English more as subject than other participant teachers. The first of these was a stronger tendency to provide moral instruction to their learners, often perceived as an important part of their role. This typically involved guidance in social responsibility, personal hygiene and self-improvement (common among Indian teachers; Anderson, 2020d), but also, in Dipika's case, ensuring that her learners became streetwise to navigate the many dangers of their urban slum backgrounds:

> I'm not Mahatma Gandhi, and I don't want to take the place of God. I'm a simple human being, so I don't tell them that you should not cheat or you should not lie. I also teach them how to lie, when to lie and when to cheat, and that is wrong (laughs), that *saam, daam, dand, bhed!*[6] (Dipika)

The second of these was the frequent inclusion of text interpretation, a predominantly teacher-led activity in which the teacher would read through, translate and explain a text in whole-class mode, rather than allowing opportunities for learner-independent reading. While it is a common practice in India (Bhattacharya, 2013; Meganathan, 2017), text interpretation was nonetheless

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[6] A Hindi proverb literally meaning 'entice, pay off, punish or blackmail', analogous to 'by hook or by crook' in British English.

typically more interactive among these three teachers than in classes of non-participant English teachers where it was also regularly observed. The third fairly transmissive practice observed among these three teachers was the regular inclusion of planned form/content focus (i.e., lessons planned to include teacher-led presentation and controlled practice of specific grammar items, lexical features or literary devices), also shared with Gajanan. Strict behaviour management, also associated with more transmissive instruction, was shared between Shekhar, Dipika and Kuheli, two of whom taught among the largest classes of the eight PTs (Shekhar and Dipika), and two of whom were the only ones to teach in inner-city urban contexts (Dipika and Kuheli); this combination seemed to correlate, weakly but logically, with the need for increased attention to behaviour management.

A number of themes can be seen to group towards the left-centre of the field, due to their being shared predominantly between Vinay, Kuheli and Nurjahan, three TEaL-oriented teachers with stronger beliefs in prioritising the development of learner competence in English. Several such themes were indicative of an interest in developing learner autonomy – the frequent inclusion of independent silent reading practice, a focus on the development of learner study skills (Vinay and Nurjahan mainly), and the theme of learner autonomy itself, which was also shared with Manjusha, who frequently gave learners more independence and scope for creativity than they expected during activities and project work:

EXTRACT 8.5: Manjusha, Grade 9

T: Decide *on your* company *name first*.

S1: Madam! Madam!

T: *It's your own* company.

S2: Makes? (suggestion for company name)

T: *Your* ideas *and* company *name, when heard, should be mouth-watering, upon hearing the name, the* company's *name*.

S2: Yes ma'am.

T: *So, you all* decide *what should be the name. I'm not going to tell you anything*.

Vinay, Kuheli and Nurjahan also shared one other, more interpersonal theme that was also important in developing learner competence in English, also present in Raju's teaching: regular opportunities for 'chit-chat' (Kuheli's term),

when the teacher would (especially at the start of lessons) engage the learners in meaningful discussion in English-dominant discourse, often about everyday topics such as the weather, recent events and pastoral issues:

EXTRACT 8.6: Raju, Grade 7
T: (collecting register) Eighteen?
S1: Absent.
T: *What, Shashi Vardhan, the one who comes* regularly *is not coming?*
S2: Go to village.
T: Ah, he went to village? For, for what?
S2: His grandmother.
T: His grandmother?
S3: Marriage. Marriage!
T: His grandmother's marriage? (students laugh)
S2: No, no!
S3: Marriage.
T: Whose marriage?
S2: *Relatives.*
S4: *Sister.*
S1: *How do we say that?*
T: Ah, his sister's marriage.

Also towards the left-centre of the field, but located slightly lower than those described in the previous paragraph, due to their being central to the practice of Kuheli, Nurjahan and Gajanan, were the themes of negotiation, differentiation in language choice (when teachers would make more or less use of English depending on learner proficiency), and differentiated feedback (when teachers would provide feedback appropriate to individual learners' developmental needs and motivation; also shared with Vinay). A fourth theme was also shared with Raju, that of the deliberate, frequent use of learners' names, both for nomination and behaviour management. These four themes can all be seen to relate broadly to the topic of personalisation in the classroom, consistent with shared beliefs in recognising learners as individuals and catering for their needs appropriately. It is notable that three of these also recognised the potentially damaging effect of labelling learners (see Nurjahan's discussion of this in Section 6.4.1).

One key contextual influence, class size, can also be detected in the differences among participant teachers' practices, although it only exhibited a weak correlation to the two areas of difference, primarily DoC. It is notable that the three teachers with the largest classes (Dipika, Nurjahan and Shekhar) shared three practices that were generally less evident in the classes of most others: effective behaviour management (i.e., specific interventions that were seen to reduce disturbance and increase learner application) (also shared with Kuheli), a brisk pace through lessons (to retain learner attention) and higher time on task (also shared with Vinay). All of these can be seen to be appropriate practices in large classes insomuch as they are all effective ways to ensure a large group of learners remains focused, on task and less likely to disrupt peers or the general flow of the lesson. Conversely, in smaller classes, there was a higher likelihood of teachers engaging in more dialogic talk with students, and higher likelihood of their using learners' names (Nurjahan, who regularly used names in much larger classes, was the exception to this last tendency), although this was also influenced by more idiosyncratic factors; Manjusha and Vinay both had fairly small classes, but both also admitted that they weren't very good at remembering names.

The few remaining themes where significant difference was noticed among the participant teachers for which potential clustering explanations could not be found were comparatively few; none were deemed to be central features of their practice. This included two themes that were shared among four widely dispersed teachers – the inclusion of frequent brief reviews of prior learning especially at the start of lessons (Raju, Dipika, Nurjahan and Kuheli), and the frequent provision of procedural feedback during their monitoring of learner-independent activities (Vinay, Dipika, Nurjahan and Kuheli). While the three teachers who were most likely to engage in written planning all taught large classes (Dipika, Shekhar and Nurjahan), this was likely coincidence; Dipika was required to do so by the school authorities but rarely referred to her plans in class.

The above analysis indicates that the two dimensions of conception of subject and degree of control present a useful field within which to explore perceived similarities and differences among the eight PTs in this study, revealing how specific practices tended to cluster among teachers located closely together on the CoS/DoC field. Although these constructs 'emerged' from within my research findings (both preliminary and data analysis), it is notable that they bear similarities to those of Bernstein, who, while writing in very different circumstances, shares much of my positioning (Northwestern academia) and concerns. As such, it should be acknowledged that

the analysis presented here is likely influenced by the bias implicit in my gaze as a Northern researcher and teacher educator. While I have spent a large part of my career working in the global South, much of this has been on projects that have sought to introduce more 'progressive' approaches into classrooms typified as 'traditional' in their pedagogic practices (the international 'expert' predicament; see Alderson & Scott, 1992). As such, it is likely that this bias has influenced the themes discussed here. A researcher with a different (e.g., Indian) background may identify different differences from within this dataset that may or may not benefit from the framework provided – a potentially useful focus for future research. These are important limitations for the reader to note. Bearing this in mind, this chapter concludes with consideration of Bernstein's own framework in relation to education in India.

8.5 CRITICAL REFLECTIONS ON BERNSTEIN'S SOCIOLOGY

While the aim of this study was never to offer an appraisal or critique of Bernstein's sociology of education, the findings presented here, alongside Sriprakash's work, also conducted in India (see Sriprakash, 2011, 2012), confirm the value of key distinctions in his work (e.g., classification and framing; performance and competence models) as constructs that can usefully apply to contexts beyond Bernstein's initial frame of reference (education in Western Europe) to help us to understand diversity in pedagogic practice. However, when one attempts to conduct a more detailed application of Bernstein's structuralism to the context and findings of this study, one encounters difficulty.[7] Likely in part because his framework attempts to describe the system as a whole, it runs the risk of oversimplifying processes, sources of authority and teacher agency, conflating issues that teachers and schools can and do influence with those that they cannot, at least when applied to education in India. The complexity of nuanced, interconnected layers, and multiple sources of power and agency that exist within the different communities of practice and discourse in education in India (if they are ever separable) render Bernstein's distinction between 'official' (governmental) and 'pedagogic recontextualising fields' (2000, p. 33) oversimplistic. To illustrate this point, at the highest levels of official discourse in India, we find

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[7] While this may be seen to undermine his second criterion for validation of his framework, that 'the theory must be capable of providing an explicit, unambiguous description of the objects of its analysis' (2000, p. 91), Bernstein may not have intended or expected the framework to apply to all educational contexts worldwide.

broadly competence-oriented models promoted in language teaching (often somewhat vaguely; Alexander, 2008); for example, in ministry publications (e.g., NCERT, 2006, 2011; Government of India, 2020). Yet, at the same time, more performance-oriented diktats can be disseminated from the ministry through internal channels, for example, in attempts to boost exam achievement. At median levels (state and district offices, seminars and workshops), iterations of curricula and materials come into fruition and evolve through the influence of numerous stakeholders; these materials may be more or less consistent with the competence-oriented models promoted at the highest levels, depending on the relative power and influence of the stakeholders in question (e.g., university academics, curriculum panel members and elected officials); a comparison of different textbooks at both national (e.g., CBSE) and state level (SCERT) reveal these differences. These median-level communities also manage assessment practices that may contradict curricular objectives, often pulling them towards more localised, tradition-oriented norms (usually more strongly classified) and turning the subject, English, into a more canonical 'singular' in Bernstein's terminology.[8] Then, at the school level, we find variation in the extent to which the need for education to meet performance expectations influences both other contextual factors (e.g., the adoption of exam-oriented workbooks in Dipika's school) and teacher autonomy differently in different contexts. And finally, in the classroom, we find teachers whose knowledge of context, curriculum, learners and pedagogy informs their attempts to navigate between these varying influences and constraints, which all impact on their degree of autonomy. The eight expert teachers in this study possess an awareness of both performance and competence models of learning (TEaL and TEaS) that lead them, at times, to adopt pragmatic solutions (e.g., Vinay's choice to delay exam preparation until the final trimester), and, at times, cause internal conflict (e.g., the guilt felt by Dipika that she cannot practice what she preaches), ultimately realising themselves through hybrid approaches in the classroom. While Bernstein predicts the existence of 'a range of ideological pedagogic positions which struggle for control of the [official and pedagogical recontextualising] field[s]' (2000, p. 115), the layers of complexity described here render his two-layer distinction oversimplistic and unhelpful; officials may agree with teachers but not academics, and some materials writers may agree with national policy while others with academics or teachers. Struggle can occur not only between the many

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8   Bernstein used the term 'singular' to refer to established school subjects that had developed their own strongly classified discourse (2000, p. 9).

levels involved, but within them; in Dipika's case, even within her own belief system. Yet equally pervasive in influence is the amalgam of socially inherited assumptions and ways of acting – Bourdieu's *habitus* (1977), rather than Bernstein's *code* – that do not so much struggle for control of the pedagogic device, but exert their influence more unconsciously, as different aspects of discourse are made sense of, converted into texts and circulated at every level. In this sense, Bernstein's structuralist framework is not able to shed useful light onto the multiple complexities at play as regulative and instructional discourse are contested, appropriated and unconsciously moulded by diverse stakeholders on every level from the national ministry offices in Delhi to the classrooms of Telangana, Maharashtra and West Bengal.

8.6 CONCLUSION

This chapter has offered a contextualised description of key differences observed among participant teachers, primarily in classroom practice. It has found that the majority of these differences seem to relate to two key areas of difference: conception of subject and degree of control, which are to some extent comparable to Bernstein's constructs of classification and framing respectively. The findings demonstrate how each teacher's enacted CoS is influenced in part by contextual constraints, particularly when these constraints reduce teacher autonomy (as in Dipika's case), but also in part by other factors, such as personal beliefs, interests and professionalism (as in Vinay's more autonomous case). They also demonstrate how each teacher's DoC involves several composite features that vary independently of one another, yet together provide a broader picture of their individual framing tendencies, each influenced by similar factors: context, personal beliefs and values, interests and professionalism. The finding that more learner-centred practices tend to cluster towards the bottom-left of the field is expected and consistent with Bernstein's discussion of 'progressive' approaches involving weaker classification and framing than alternatives (e.g., 2000, p. 14, p. 54). Yet, it would be a dangerous simplification to reduce the already simplified representation provided by this two-dimensional field to the single issue of learner-centredness; it is also important to bear in mind the many shared features discussed in Chapter 7 (and not illustrated on this field) that at times involved practices associated with learner-centred education (e.g., regular independent activities, collaborative learning and active monitoring) and at times involved practices typically labelled 'teacher-centred', 'traditional' or

'transmissive' (e.g., whole-class teaching and a tendency to prioritise learner understanding over higher-order thinking skills). To shed further understanding onto all of these practices, Chapter 9 will compare these findings to the wider literature on teacher expertise. Numerous similarities will be evident as well as a number of important differences, all of which seem to relate primarily to the many contextual challenges that these eight teachers are likely to share with other teachers working in the global South.

9   Teacher Expertise in the Global South

Understanding Practices, Contexts and Constraints

…the result of this examination is: we see a complicated network of similarities overlapping and criss-crossing: sometimes overall similarities, sometimes similarities of detail … I can think of no better expression to characterize these similarities than 'family resemblances'.

(Wittgenstein, 1958, p. 32)

Chapters 6, 7 and 8 of this book have presented key findings of my research into teacher expertise in India as a study context that, I have argued, is representative of the global South. While challenges relating to observation (the Northern gaze), analysis (my attempts at inductive categorisation) and comparison (how to quantify difference) are likely to have influenced the findings presented, I would nonetheless argue that the portrait of Nurjahan in Chapter 6, the domain-specific comparison of the eight teachers in Chapter 7 and the analysis of difference in Chapter 8 all offer findings that portray the subjects of my study with a degree of faithfulness so as to be useful to my aim. The eight participant teachers have offered respondent validation feedback both on my individual accounts of their practice and on the comparison chapters that agree well with this evaluation.

The next stage of this study confronts a rather different type of challenge: to establish whether what Wittgenstein called 'family resemblances' exist among the wider cohort of expert teachers worldwide by addressing a key question at the root of the project:

> To what extent do the participants, as examples of expert teachers working in the global South, differ in their practices, cognition and personal attributes from expert teachers working in the global North?

To do this, the chapter offers a careful comparison of the non-subject-specific findings of my study with those from the systematic literature review presented in Chapter 3. There I presented an initial prototype of the expert teacher by describing specific features that are each supported by the findings of four or more prior expertise studies, either from different educational systems or at different levels (e.g., primary and secondary). In the discussion below, I have attempted to compare these findings (discussed hereafter as 'themes') to similar themes that arose during the inductive analysis of my own data as systematically as possible. Support was deemed 'strong' for any theme that either scored highly on the comparative spreadsheet developed during data analysis[1] or (when themes were not directly analogous) was found to be broadly true for six or more of the participant teachers (PTs); support was considered 'partial' for themes that scored in the intermediate range or were considered broadly true for 3–5 PTs; support was considered weak for themes that scored low or were considered broadly true for 1–2 PTs. While this may seem a fairly systematic step, in keeping with the critical realist perspective adopted in this study, it is also important for me to acknowledge that it involves a further degree of interpretation, not only concerning value judgements regarding, for example, how much evidence makes a theme 'broadly true', but also when comparing themes in the two datasets and the extent to which they offer evidence of the same thing. Given that each of the areas of cognition, pedagogy and professionalism discussed below involve specific constructs in educational theory (e.g., 'formative assessment', 'constructivism' and 'care') that I and other writers may understand differently, this constitutes personal interpretation that will inevitably impact, to some extent, on what is presented here as significant.

I have arranged the discussion into the following twelve categories, which allow me to separate out the wide range of themes that fall under the broad domain of 'pedagogic practice':

1. Knowledge base

2. Cognitive processes

3. Beliefs

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[1] On the comparative spreadsheet each theme was scored as follows for each teacher: 0=not present; 1=occasional/rare; 2=sometimes/often; 3=frequent/common. Mean scores across all eight teachers were then calculated and coded thus: 0–1.0 = weak evidence; 1.0–2.0 = partial evidence; 2.0–3.0 = strong evidence (see Anderson, 2021).

4. Personal attributes

5. Professionalism

6. Interpersonal practices

7. Languaging practices

8. Lesson planning and preparation

9. Structure and freedom

10. Interaction dynamics

11. Pedagogic strategies

12. Assessment practices

As well as assessing similarities and differences in these categories, the discussion below will seek to offer contingent reasons, often supported by causal evidence, for the areas of differences and similarity to build understanding, both of Southern teacher expertise and the wider expert teacher prototype that may be more independent of contextual characteristics and constraints. Of course, at times, the subject focus of my study (English) and my own background in language teaching are likely to have influenced a number of the findings (particularly differences) presented in this chapter (e.g., the detailed focus on languaging practices); this should be borne in mind by the reader and is discussed further where relevant and in Chapter 10.

The chapter will also take the opportunity to consider the findings of this study from the perspective of learner-centred education; that amalgam of ideologically related methodological recommendations for appropriate effective teaching (see Bremner, 2021; Schweisfurth, 2013a) that has been widely promoted across the global South – some would argue for the wrong reasons (e.g., Tabulawa, 2003) – for several decades.

9.1 THE KNOWLEDGE BASE OF EXPERT TEACHERS

Of eight knowledge-related themes found to be well supported in the wider teacher expertise literature, all but one were strongly supported by this study (see Table 9.1), indicating that this is likely an aspect of teacher expertise that exhibits comparatively little context-related variability. While the prior literature emphasises the integrated nature of this knowledge base and the importance of pedagogical content knowledge in this integration (Shulman,

Table 9.1 Knowledge base of expert teachers

Theme	Evidence from prior research	Example prior studies	Evidence from my study
Extensive, integrated knowledge base (incl. wide range of topics)	Strong	Bond et al., 2000; Tsui, 2003	Strong
Extensive subject/content knowledge (incl. explicit language knowledge for language teachers)	Strong	Andrews & McNeill, 2005; Smith & Strahan, 2004	Strong
Extensive knowledge about learners (both general and individuals)	Strong	Bevins, 2002; Bullough & Baughman, 1995	Strong
Extensive knowledge about curriculum	Strong	Pepin et al., 2017; Westerman, 1991	Strong
Self-regulatory knowledge	Strong	Bullough & Baughman, 1995; Crawford et al., 2005	**Partial**
Knowledge is specific to the context in which they work (non-transferable)	Strong	Berliner, 1988; Bond et al., 2000	Strong
Extensive pedagogical knowledge	Strong	Swanson et al., 1990; Wolff et al., 2015	Strong
PCK is well developed	Strong	Andrews & McNeill, 2005; Gudmundsdottir, 1991	Strong

1986, 1987), an important finding of this study (both the literature review and the empirical data presented above) is that knowledge of learners seems to be more central to the participants' PCK than knowledge of subject or teaching strategies, something not emphasised in Shulman's original conception (1986) or Gudmundsdottir's related expertise research (1990, 1991), but evident in more recent studies (e.g., Bertram, 2012; Bevins, 2002; Hatch, 2015). Without this knowledge, teachers cannot make appropriate decisions about what to do (both while planning and in class) or how to do it (i.e., activity type, pace or teaching strategy); nor can they estimate timing or learner difficulties with activities. This was found to be particularly true for the eight PTs in my study, who revealed, both through their post-lesson interviews and planning practices, an ability to accurately predict 'possible occurrences' (Anderson, 2015a, p. 235) and appropriate responses.

The large or very large class sizes experienced by teachers in my study presented a particular challenge with regard to knowledge of learners – that of remembering them as individuals. In post-lesson interviews, several PTs revealed an impressive memory for the name, challenges and 'backstory' (Sorensen, 2014, p. 152; also Goodwyn, 2011) of each learner, despite having well over 200 on their registers in some cases (e.g., Dipika). Yet this ability was not universal among the PTs, and two who seemed to possess

less individual awareness of their learners' names and needs (Vinay and Manjusha) nonetheless showed sufficient understanding of the typical attributes of their learners so as to be able to plan and predict difficulties effectively (see Bertram, 2012). Rather than developing detailed knowledge of each individual they taught, they were aware of different learner types in their classes as revealed through, for example, Vinay's regular reflections on the affective challenges experienced by many boys in Grade 10 and Manjusha's ability to predict which groups needed more extensive support at the beginning of an activity; the 'group picture' described by Carter et al. (1987, p. 149). While the challenge of teaching large classes is often assumed to be a defining characteristic of classrooms in developing countries (e.g., Shamim & Kuchah, 2016), the reality may be more varied, given that large classes are also specific to certain levels of education (e.g., university lectures; Lawrie et al., 2019) and smaller classes are also often noted in Southern contexts, particularly in rural areas (e.g., Little, 1995; also in this study).

The only theme in the area of teacher knowledge often reported in expertise studies (e.g., Bullough & Baughman, 1995) that was not strongly supported by my data involved self-regulatory knowledge, 'knowledge of how to manage [oneself] to attain [one's] goals', a construct that, in expertise studies, has largely been borrowed from Bereiter and Scardamalia's (1993, p. 48) work. Because this study did not investigate it directly, the only evidence for it was somewhat circumstantial and occasional, relayed through PT anecdotes or planning observations, although it was not prominent in longer 'espoused theory' interviews.

9.2 THE COGNITIVE PROCESSES OF EXPERT TEACHERS

While this study did not focus primarily on cognitive processes, evidence from lesson observations corroborated by post-lesson interviews and think-aloud planning protocols offered strong support for six of seven cognitive processes regularly reported in prior expertise studies (e.g., Wolff et al., 2015), suggesting that this domain of teacher expertise also exhibits comparatively little context-related variability (see Table 9.2). On multiple occasions, the eight PTs demonstrated that these areas of cognition are also fully integrated (as is their knowledge base): the presence of extensive, automated heuristics enabled them to attend to relevant information, notice and respond appropriately to learner challenges (e.g., Extract 7.9), requests (e.g., Extract 7.17) or unexpected disturbances and off-task behaviour. This is exemplified in

Table 9.2 Cognitive processes of expert teachers

Finding / theme	Evidence from prior research	Example prior studies	Evidence from my study
Extensive and automated cognitive processes/ heuristics (teaching or planning)	Strong	Allen & Casbergue, 1997; Borko & Livingston, 1989	Strong
Attends primarily to relevant information	Strong	Carter et al., 1988; Wolff et al., 2015	Strong
High awareness of what's happening in class	Strong	Sabers et al., 1991; Wolff et al., 2015	Strong
Able to deal effectively with the unexpected (due to automated processes)	Strong	Goodwyn, 2011; Leinhardt & Greeno, 1986	Strong
Able to make appropriate decisions/improvise responsively in class	Strong	Bond et al., 2000; Westerman, 1991	Strong
Able to solve problems effectively	Strong	Asaba, 2018; Sorensen, 2014	**Partial**
Regularly engages in progressive/experimental problem solving	Strong	Milstein, 2015; Tsui, 2003	Strong

Extract 9.1, when Dipika, in the middle of an activity introduction, is able to notice and refocus a small number of distracted learners and then return immediately and unphased to her instruction.

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EXTRACT 9.1: Dipika, Grade 10

T: First of all, we will do some paragraph
writing. (T. spots several learners distracted by
a disturbance in the corridor) Those of you who
are looking outside, can go and stand out there.
(learners quickly turn to face the teacher) Whatever
topic you are writing about, you should be able to
write one or two sentences from your mind about it.
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While the PTs were regularly observed to engage in experimental problem solving, there was some variation observed among them concerning how effective this was; at times solutions seemed to be effective and apposite, and at others less so (e.g., behaviour management strategies for several ETs; see Section 7.2.2), hence offering more limited support for a regularly documented finding in prior research, that of expert teachers' ability to solve problems effectively (e.g., Asaba, 2018).

Findings in the area of knowledge base and cognitive processes indicate, perhaps unsurprisingly, that there is little contextual variability in what might be called 'the cognitive core' (i.e., not including beliefs) of expert teachers (discussed further in Chapter 10).

9.3 THE BELIEFS OF EXPERT TEACHERS

Of nineteen themes relating to expert teacher beliefs investigated, strong evidence for eleven was found both in the wider literature and in this study, indicating that a number of expert teacher beliefs may be independent of contextual influences (see Table 9.3). Foremost among these are beliefs in ensuring learner engagement during lessons, which came through strongly in the PTs' narratives and also in the wider literature (e.g., Milstein, 2015), beliefs in a number of aspects of constructivism and particularly several beliefs relating to relationships, such as in the importance of respect, recognition of learners' individual needs (e.g., Smith & Strahan, 2004) and a belief in avoiding 'labelling' learners (e.g., Tsui, 2003).

However, there was greater difference in this area than in the two other areas of cognition analysed above. Perhaps most notable among the differences found were two related beliefs: in building learners' self-esteem and in learning without fear (a belief in removing the threat of humiliation, sanction and corporal punishment), which were expressed regularly by the participant teachers but much less evident in the wider literature; the first only mentioned occasionally and briefly (e.g., Bullough and Baughman, 1993; Hanusova et al., 2013), the latter (learning without fear) not found in the wider expertise literature. This discrepancy is likely explained primarily by contextual factors. In the majority of education systems in higher-income countries, learner self-esteem is likely to be higher on average for a range of reasons (e.g., a less-demanding curriculum, less social stigmatisation of lower caste/class learners, greater prior success and parental expectation, etc.) meaning that the need to build confidence is less prevalent and therefore less emphasised by expert teachers. Similarly, sanctions in higher-income contexts are more likely to be appropriate and in line with national policy recommendations, greatly reducing the likelihood of oppressive behaviour or abuse by teachers. Despite being outlawed, corporal punishment is still widespread in India (Sarangapani et al., 2013) and noted frequently in other developing countries worldwide (UNESCO, 2017). In this regard, it is revealing that a similar emphasis on the need for 'safe' learning environments is mentioned in the literature on effective teaching in developing countries reviewed in Chapter 4 (e.g., Addy et al., 2012; OECD, 2018; Westbrook et al., 2013), and a focus of specific intervention initiatives, such as 'learn without fear' in Malawi (UNESCO, 2017).

Another notable difference in beliefs between my findings and those of prior expertise studies relates to teacher expectations of learners. Several

Table 9.3 Beliefs of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Beliefs in…			
A sense of moral duty or mission towards learners	Strong	Bullough & Baughman, 1995; Campbell, 1991	Strong
Self as a role model	**Limited**[2]	Toraskar, 2015; Yang, 2014	Strong
Close relationships/good rapport as important	Strong	Blackwell, 2020; Schempp et al., 2002	Strong
Knowing one's pupils well	Strong	Hanusova et al., 2013; Rollett, 2001	**Partial**
Motivating learners as important	Strong	Li et al., 2011; Yuan & Zhang, 2020	Strong
Engaging learners as important	Strong	Asaba, 2018; Milstein, 2015	Strong
Having high expectations/setting high challenges for learners	Strong	Torff, 2006; Tsui, 2003	**Weak**
Ensuring learner understanding	**Limited**	Traianou, 2006	Strong
Building learner self-confidence	**Limited**	Bullough & Baughman 1993; Hanusova et al. 2013	Strong
Avoiding blaming learners for shortcomings	Strong	Goodwyn, 2011; Smith & Strahan, 2004	Strong
Encouraging learners to take responsibility for own learning	Strong	Gross, 2014; Smith & Strahan, 2004	**Partial**
Accepting primary responsibility for learning	Strong	Campbell, 1991; Schempp et al., 1998	Strong
Respecting learners	Strong	Blackwell, 2020; Bond et al., 2000	Strong
Avoiding making a priori assumptions or labelling learners	Strong	Bullough & Baughman, 1995; Tsui, 2003	Strong
Treating learners as individuals with diverse needs and backgrounds	Strong	Rollett, 2001; Smith & Strahan, 2004	Strong
Linking learning to learners' lives and schemata	Strong	Gudmundsdottir, 1991; Traianou, 2006	Strong
Constructivism (or aspects of)	Strong	Chen & Rovegno, 2000; Lawrie et al., 2019	Strong
Encouraging multilingual learning	**None found**	-	Strong
Learning without fear	**None found**	-	Strong

prior expertise studies report that expert teachers 'set the bar high' (Milstein, 2015, p. 161) or push their learners to achieve more (e.g., Sorensen, 2014; Torff, 2006). However, only Kuheli, who worked in the most privileged context

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[2] 'Limited' is used in this column to indicate that only 1–3 prior studies were found to support a theme.

among the PTs (also, to a lesser extent, Nurjahan), believed in setting high standards for her students; a belief that was reflected regularly in her classroom practice (e.g., expectations regarding homework completion, pushing learners to justify chosen answers). All other PTs – and Kuheli for her less able pupils – more often prioritised inclusivity and encouragement, being willing to sacrifice even basic expectations to provide opportunities for a greater cross section of learners to contribute during lessons. This was most obviously realised in their language use practices (see Section 7.3 and below), and also observed in how they adapted (usually through simplification) textbook materials to ensure learner understanding and engagement (e.g., Shekhar's discussion tasks). It was also evident in how they would make concessions for poor attenders and learners with potential learning difficulties (e.g., Gajanan's choice to avoid criticising those who had not completed homework but to praise those who had, or the regular concessions that Vinay made to his less motivated male learners). It seems that building learners' self-confidence or self-esteem was a greater priority than setting high standards among PTs, a finding that may extend to other contexts where similar challenges exist.

Another belief found to be central to the majority of PTs' discussion of their practice – in ensuring learner understanding of lesson content – was found in only one prior expertise study in the wider literature (Traianou, 2006). This difference is also likely to be influenced by contextual factors, such as the lower likelihood of learners not being proficient in the medium of instruction in monolingual curricular contexts (more common in the North), which in turn reduces the challenge that learners face in understanding teachers, textbooks and lesson content. As a result, this emphasis becomes less 'marked' as an issue, and unreported in such studies, despite clear evidence from several of a clear focus on learner understanding in classroom practices (e.g., Chen & Ding, 2018; Even & Gottlib, 2011). The strength of this belief among the PTs in my research also needs to be contextualised within an educational system where rote memorisation, rather than deeper understanding, is a widespread norm (Bhattacharya, 2013; Borg et al., 2022; Government of India, 2020). It was revealing that several PTs saw a causal relationship between this belief and one that *was* strongly supported in the wider literature – the importance of learner engagement:

> If they engage with [my] activities, it will be like helping them to understand the text on their own. (Nurjahan)

> If the students interact, we like the interaction, I like the interaction, and I think that yes, at least they are understanding what is being taught. (Dipika)

These beliefs echo the recommendations of a key OECD publication on effective teaching practices that also links these two factors:

> …it's not the facts themselves, but understanding them that matters. This has implications for teaching and learning strategies as instead of memorisation, more active engagement which aims for student understanding would be appropriate. (OECD, 2018, p. 60)

A further belief, for which no prior evidence was found in the wider literature, in multilingual inclusivity, is discussed below (see Section 9.7).

Taken together, these findings suggest that a number of beliefs are shared by expert teachers regardless of context, and that others, particularly those relating to learner welfare and inclusion, may be more evident in specific contexts where inappropriate, oppressive and even illegal practices inhibit participation and learning.

9.4   THE PERSONAL ATTRIBUTES OF EXPERT TEACHERS

Of eight personal attributes that are frequently documented among expert teachers in the wider literature, all but one were also true of all, or almost all PTs (see Table 9.4), particularly their passion for and enjoyment of their work (cf. Kunter, 2013), but also a strong sense of concern or care for their learners (also reported in the teacher effectiveness literature; e.g., Stronge, 2007). This care, and related sense of duty towards learners, is argued above to be a likely driving force in the motivation of the eight PTs to reflect critically on their practice (see below) and strive to continue developing (see Section 7.8). This is consistent with Agne's (1992) observations: 'Caring teachers … constantly strive to better themselves, not only because they choose to be life-long learners, but also because they know that they are constantly modelling to those to whom the future world will be entrusted' (p. 123). Other shared findings in this area are related to the strong sense of identity and confidence in their own ability that expert teachers often exhibit (e.g., Hanusova et al., 2014; Rollett, 2001; Smith & Strahan, 2004). These personality attributes of expert teachers are notable, particularly given that earlier presage–product studies did not succeed in finding associations between specific psychological characteristics and teacher effectiveness (see Campbell et al., 2004a).

The only personal attribute noted in the expertise literature that was weakly supported by this study is the observation that expert teachers are sometimes unusually emotional about their work, for example, when they are

Table 9.4 Personal attributes of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Passion for profession/work as teacher	Strong	Bond et al., 2000; Tsui, 2003	Strong
Enjoys teaching	Strong	Campbell, 1991; Rollett, 2001	Strong
Cares for/loves their learners (incl. unconditional positive regard)	Strong	Agne, 1992; Gross, 2014	Strong
Emotions evident/prominent	Strong	Berliner, 1988; Tsui, 2003	**Weak**
Strong desire to succeed/ambitious/motivated	Strong	Campbell, 1991; Milstein, 2015	Strong
Positive self-image/self-confidence/identity	Strong	Rollett, 2001; Smith & Strahan, 2004	Strong
Independent/autonomous	Strong	Campbell, 1991; Milstein, 2015	Strong
Resilience (and persistence)	Strong	Goodwyn, 2011; Milstein, 2015	Strong

not able to meet their own high standards (e.g., Berliner, 1988; Tsui, 2003). While all PTs exhibited high standards of professionalism when compared to colleagues, only one (Kuheli) was seen to become somewhat emotional on two occasions when she perceived that she had not met these. It is possible that, due to the significant challenges and unpredictable conditions that the PTs face on a daily basis, they have learnt to manage their expectations and emotions correspondingly. Consistent with the beliefs of Indian teachers of English (Anderson, 2020d), qualities such as resilience (strongly supported by this study; also see Campbell, 1991) and flexibility (also strongly supported as a pedagogic trait; Goodwyn, 2011) were more evident and likely of greater importance to their day-to-day emotional well-being, enabling PTs to retain, in the main, a positive self-image.

9.5 THE PROFESSIONALISM OF EXPERT TEACHERS

As discussed in Section 7.8, findings from my study with regard to teacher professionalism should be treated with caution, given that two aspects of professional practice were used as participant selection criteria for this study (role as teacher trainers and engagement in CPD). Nonetheless, there were very strong consistencies between PTs' professional practice and those described in the wider expertise literature, including a number of themes that were less directly related to these selection criteria, such as their dedication to their work (e.g., Goodwyn, 2011), the importance of professional communities of practice (e.g., Ulicna et al., 2016), their willingness to support colleagues (e.g., Pepin

et al., 2017) and their sustained interest in innovating, experimenting and challenging themselves in the classroom (e.g., Tsui, 2003).

In addition to these shared findings, the majority of PTs felt strongly that they had benefitted from specific, generally top-down training courses and workshops in their early careers, several offering examples of when and how these were important for them. No corroboration of this finding was found in the wider expertise literature. It should be interpreted on the background of a comparative lack of CPD opportunities that these eight teachers received, potentially making such events more important and memorable as a result. It also offers some support for such top-down interventions, indicating that expert teachers as 'change agents' (van der Heijden et al., 2015), such as the participants in this study, can benefit from one-off training opportunities even if changing preferences in teacher CPD has meant that they are increasingly being replaced by more teacher-led, locally directed and systematic programmes (Borko et al., 2010).

Of those areas of professional practice less likely to be influenced by the selection criteria used, the finding that almost all PTs reflect extensively – many critically – on their practice was also consistent with the wider expertise literature (e.g., Gross, 2014; Tsui, 2003), as was evidence of intrinsic self-motivation (e.g., Milstein, 2015), closely linked to PTs' sense of responsibility towards their learners (Agne, 1992). This relationship is strongly supported in the expertise literature by frequent reference to expert teachers' sense of moral duty or mission underpinning their practice (see Section 9.3), what Bullough and Baughman (1995) call 'the heroic dimensions of expertise', noting a 'sense of needing to serve young people to the best of [one's] ability' (p. 470; also see Campbell, 1991; Smith & Strahan, 2004). Hanusova et al. (2014, pp. 867–868) draw parallels between this relationship and Korthagen and Vasalos's (2005) discussion of teacher 'mission' and its relationship to their construct of 'core reflection' (p. 53; also Fullan, 1993). It seems likely that this sense of duty fuels expert teachers' intrinsic motivation, prompting both extensive, critical reflection and a commitment to lifelong professional development even in contexts where there are few opportunities for professional support, as was found in this study. Unsurprisingly, given this combination of dedication and isolation, all PTs were keen to receive feedback on their practice from me as a visiting observer; an additional finding that, while rather specific, found no precedent in the wider expertise literature.

It is notable that, when brought together, the twelve elements highlighted in Table 9.5 are consistent with Fullan's recommendations for teacher professional development (e.g., 1993), particularly the components of 'collaborative professionalism' (e.g., 2016; Fullan & Hargreaves, 2016): co-learning,

Table 9.5 Professionalism of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Dedicated/hard working/committed	Strong	Bullough & Baughman, 1995; Tsui, 2003	Strong
Continuous/lifelong learners/striving to improve	Strong	Schempp et al., 1998; Smith & Strahan, 2004	Strong
Interest in CPD/in-service qualifications	Strong	Andrews & McNeill, 2005; Tsui, 2003	Strong
Collaboration/professional learning communities/communities of practice important	Strong	Gross, 2014; Milstein, 2015	Strong
Sees training programmes as influential in CPD	**None found**	–	Strong
Shares resources/ideas with colleagues regularly	Strong	May & Curtner-Smith, 2020; Pepin et al., 2017	Strong
Helps colleagues as teacher educator (incl. mentoring, informal peer support)	Strong	Amrein-Beardsley, 2007; Traianou, 2006	Strong
Challenges self incl. through experiments, risks, innovation (incl. progressive problem solving)	Strong	Hanusova et al., 2014; Tsui, 2003	Strong
Reflects extensively	Strong	Asaba, 2018; Gross, 2014	Strong
Reflects critically (e.g., self-questioning, problematising practice)	Strong	Asaba, 2018; Tsui, 2003	Strong
Desires feedback (from observers)	**None found**	–	Strong
Leader (either in school and locally or more widely)	Strong	Smith & Strahan, 2004; Traianou, 2006	Strong

innovation, autonomy, inward-outward mindset, knowing thy impact, pedagogical precision, relentless improvement and team-orientation. Fullan observes that there exist 'instances of collaborative professionalism that may not be entirely obvious', educators who 'have been working under the radar because of misguided policies that focus on testing and evaluation' and 'can be liberated if the focus shifts from policing standards to involving everyone in the educational system as partners in collaborative professionalism' (2016, para 10), recalling well the eight PTs in this study.

9.6 THE INTERPERSONAL PRACTICES OF EXPERT TEACHERS

In the domain of interpersonal practices, evidence from this study supports five themes prevalent in the wider teacher expertise literature, also reflected in the beliefs of expert teachers (see above). These include expert teacher's

Table 9.6 Pedagogy: Interpersonal practices and classroom community of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Creates positive, supportive learning environments	Strong	Schempp et al., 2002; Smith & Strahan, 2004	Strong
Develops close, meaningful relationships with learners	Strong	Agne, 1992; Gross, 2014	Strong
Using learners' names regularly	**Limited**	Clarridge & Berliner, 1991	Strong
Engages learners through practices/ content /activities/strategies	Strong	Bond et al., 2000; Milstein, 2015	Strong
Regular use of positive reinforcement/ praise	Strong	Blackwell, 2020; Stough & Palmer, 2001	Strong
Lesson is made enjoyable for learners (e.g., humour, fun activities)	Strong	Arani, 2017; Milstein, 2015	Strong
Frequent interaction with parents	**None found**	–	Strong

regularly documented skills in creating positive, supportive learning environments (e.g., Schempp et al., 2002) in which they develop close, meaningful relationships with learners (Gross, 2014) and offer regular positive reinforcement, particularly through praise (Blackwell, 2020) – all evident across all eight PTs (see Section 7.2). It also includes their ability to engage learners effectively in class (Bond et al., 2000), employing humour in the process (e.g., Arani, 2017). Two further, more specific themes also found in this study receive less support from the wider literature: PTs' willingness to interact frequently with learners' parents in order to manage pastoral issues or check up on learners' wider welfare, and their use of learners' names, which was, at times, linked directly to issues of confidence building and inclusivity by PTs (discussed under Beliefs in Section 9.3). As Nurjahan noted, '…to make them realise that … you are important for me, I use their first names'.

This strong correspondence in the area of interpersonal practices suggests that this is an important area of teacher expertise that is likely to manifest itself similarly irrespective of context. The fact that effective interpersonal practices seem to be common regardless of contextual constraints is significant, although it is likely that local cultural norms (e.g., child-adult interaction conventions) and needs (e.g., for regular contact with parents) indicate the presence of more specific practices at finer levels of analysis.

9.7 THE LANGUAGING PRACTICES OF EXPERT TEACHERS

Probably the most prominent finding of this study that is largely absent from the wider expertise literature involves PTs' complex multilingual practices and related beliefs (see Section 7.3). While this may be influenced in part by the subject focus of my study (English), it is important to note, firstly, that it is supported by two of the most detailed, non-subject-specific studies of effective teaching practices in developing countries (Pryor et al., 2012; Westbrook et al., 2013), and secondly, that across much of the global South language diversity is higher, on average, than in the global North (de Grauwe, 2006), sometimes much higher. As a result, many learners receive instruction in a range of subjects in languages that are not their most enabled (i.e., second, third or even fourth language), sometimes including initial literacy development at primary level, making this an important contextual factor characterising many, but not all, Southern contexts (see Section 4.1). Given that the majority of expert teacher studies conducted to date involved predominantly 'monolingual' curricular contexts (e.g., USA, UK and China[3]), and that those reliable expertise studies conducted in additional language classrooms contribute very little discussion of multilingualism (e.g., Hanusova et al., 2013, 2014; Tsui, 2003), almost nothing is known about the practices of expert teachers who work in multilingual classrooms. Thus, the more detailed findings of this study documenting the language-inclusive beliefs and practices of PTs, their varied uses of translation, and the use of the more enabled language (MEL) both to facilitate and assess learner understanding (see Anderson, 2022b) are all notable, and largely consistent with the rapidly expanding literature on good practice regarding language teaching (e.g., Butzkamm & Caldwell, 2009; Cook, 2010) and multilingual literacy development (e.g., Cummins, 2011).

The discussion of PTs' practices from a translanguaging perspective may also contribute usefully to the rapidly expanding literature in this area (see, e.g., García et al., 2017), the majority of which has, to date, come from the global North (Heugh, 2021), with little detailed qualitative research from India (Anderson & Lightfoot, 2021; Lightfoot et al., 2022). The combination of spoken translanguaging and largely monolingual English writing among PTs and their learners is particularly interesting, due to it being largely reflective

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[3] All these countries have predominantly or exclusively monolingual curricula even if they include a much greater number of languages in wider society.

Table 9.7 Pedagogy: Languaging practices of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Integration of other languages in classroom discourse to facilitate learning	**Minimal**	Toraskar, 2015	Strong
Inclusivity towards learners' preferred languages	**None found**	–	Strong
Conscious simplification of spoken English	**None found**	–	Strong

of wider social practice in India, where written uses of English are typically monolingual (Si, 2011), yet spoken uses are much more translingual, with English resources typically freely integrated into other languages (Agnihotri, 2007). This observation is largely consistent with Anderson's (2018b) vision of 'translingual teachers' who are 'able to model effective translingual and monolingual practices across the translingual continuum' (p. 34), encouraging similar practices among their learners and enabling them to 'monolanguage' (p. 32) in examinations when required (also see Canagarajah, 2013). Further research is required on the extent to which expert teachers working in monolingual curricular contexts may exploit affordances to integrate the languages of learners for whom the MOI is not their MEL in classroom practices (see, Cummins, 2001; Cummins et al., 2006).

9.8 THE LESSON PLANNING AND PREPARATION OF EXPERT TEACHERS

Of nine themes categorised under the sub-domain of lesson planning and preparation, only four found strong support from both this study and the wider expertise literature. This includes the often-surprising finding (particularly to administrators) that expert teachers often do not write lesson plans (Borko & Livingston, 1989) and may even be 'anti lesson plans' (Gross, 2014, p. 116). As frequently observed in the wider literature, the PTs' planning was ostensibly a mental process (Borko & Livingston, 1989; Westerman, 1991), fluent and efficient (Li & Zou, 2017), and their plans were contingent and flexible (Tochon & Munby, 1993; Yang, 2014). Some support was also found for a frequent finding in the wider literature, that expert teachers plan carefully (e.g., Leinhardt, 1989); several, but not all PTs, seemed to be planning more carefully than comparable colleagues. These two findings (that expert teachers plan carefully but do not necessarily make any written notes), while apparently opposing, can be reconciled if, as Scrivener discusses, planning is

Table 9.8 Pedagogy: Lesson planning and preparation of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Planning is wholly or predominantly mental, not written	Strong	Borko & Livingston, 1989; Westerman, 1991	Strong
Careful planning (as either mental or written process)	Strong	Leinhardt, 1989; Tsui, 2003	**Partial**
Plans flexibly and contingently	Strong	Borko & Livingston, 1989; Tochon & Munby, 1993	Strong
Considers learners' needs when planning (both group and individuals)	Strong	Goodwyn, 2011; Pepin et al., 2017	Strong
Considers long-term objectives when planning	Strong	Chen & Rovegno, 2000; Pike, 2014	**Partial**
Reduces curriculum coverage to spend more time on specific elements	**Limited**	Lawrie et al., 2019; Schempp et al., 2002	Strong
Makes regular use of teaching/learning materials	Strong	Pepin et al., 2017; Yang, 2014	**Weak**
Develops own activities and/or resources	Strong	Lin & Li, 2011; Pepin et al., 2017	Strong
Integrates use of ICT into practice	Strong	Pepin et al., 2017; Pike, 2014	**Partial**

seen as 'essentially a thinking skill … imagining the lesson before it happens' (Scrivener, 2005, p. 109); this was consistent with my observations of a think-aloud planning task I conducted, when few notes were taken but extensive consideration of different lesson contingencies based particularly on learners' needs (Goodwyn, 2011) was observed. Despite the PTs' expertise, it seemed to be the case that (mental) planning was indeed important in their practice; on the few occasions when they did not have sufficient time to prepare (often for reasons beyond their control), their lessons were less likely to be effectively structured and their activity choice and instructions less appropriate.

In the area of materials preparation, PTs were often observed to develop their own activities to supplement core curriculum content according to the needs of their learners, consistent with findings of prior expertise studies (e.g., Lin & Li, 2011). However, only two were frequently observed to make use of bespoke teaching and learning materials (TLMs); this finding contrasted with the wider expertise literature, where such use of TLMs is regularly documented (Pepin et al., 2017). The remaining six teachers typically supplemented core curriculum content through activities that required few, if any, TLMs, often set up through instructions delivered orally, or tasks written on the board (e.g., Nurjahan's text comprehension questions and Vinay's 'conversation with the snake' writing activity). This reduced both time spent

preparing and personal financial cost, the latter found to be considerable to the two PTs who did prepare their own materials given the lack of support for this at their schools. The only finding in this sub-domain from this study for which only limited support was found in the wider literature related to the choice made by several of the PTs to reduce overall curriculum coverage in order to spend more time on specific elements of this. This was rationalised by PTs on several occasions due to the highly ambitious curricula that all experienced; because of the above-discussed felt need to prioritise understanding, they often took longer than peers to cover content and found themselves prioritising areas that they felt were either more useful or more likely to come up in end-of-year examinations; a pragmatic choice caused by a challenge that is frequently reported in developing countries (Alexander, 2000; Banerji, 2019a; Pritchett & Beatty, 2012, 2015; World Bank, 2019b), and likely shared more widely across the global South.

A final area of difference between the findings of the wider literature and this study in the area of lesson preparation relates to the integration of ICT into teaching practice, one that is more obviously dependent on contextual circumstances, specifically investment in such resources. ICT is frequently found to be widely integrated into expert teacher practice in upper-middle- and high-income contexts (e.g., Pepin et al., 2017). While several of the PTs made innovative, often impromptu use of their own mobile phones in class, difficulties with accessing functional ICT resources for most meant that only one (Vinay) made regular use of ICT, thanks to a single functioning data projector in his school. Despite the fact that many state schools in India and other countries across the South have some ICT facilities (e.g., computer rooms), these are, ironically, frequently perceived to be too valuable to permit regular use by students (e.g., Rubagiza et al., 2011), and are kept under lock and key (including in two PTs' schools).

9.9   HOW EXPERT TEACHERS BALANCE BETWEEN STRUCTURE AND FLEXIBILITY

A large number of expertise studies shine important light onto how expert teachers balance between the contrasting needs for structure (e.g., planning, lesson routines and progress through curricular objectives) and flexibility (responsiveness to learners' emerging needs, preferences and challenges) in their teaching (e.g., Borko & Livingston, 1989; Hatch, 2015). In this area, strong correspondence was found between my findings and those of prior expertise research, with only one notable difference (see Table 9.9). As indicated earlier,

Table 9.9 Pedagogy: Structure and flexibility of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Has clear routines and procedures	Strong	Leinhardt et al., 1987; May & Curtner-Smith, 2020	Strong
Reflects interactively	Strong	Asaba, 2018; Yang, 2014	Strong
Displays flexibility/improvises when teaching (adaptive expertise)	Strong	Borko & Livingston, 1989; Even & Gottlib, 2011	Strong
Gives learners choice/negotiates	Strong	Even & Gottlib, 2011; Smith & Strahan, 2004	Strong
Can keep lessons on track (to achieve aims)	Strong	Borko & Livingston, 1989; Traianou, 2006	Strong
Aware of achievement of aims/objectives	Strong	Chen, 2001; Westerman, 1991	Strong
Lesson summary at end (e.g., learning points, formative questioning)	Strong	Lin & Li, 2011; Schempp et al., 2002	**Partial**

the eight teachers in my study were all found to plan contingently and flexibly, often taking aims into class in mental representations only. Once in class, their practices strongly supported the frequent finding that expert teachers are able to exhibit considerable flexibility while teaching, often 'changing tack' (Bevins, 2002, p. 118) in response to learners' emerging needs and challenges (e.g., Berliner, 2004; Sorensen, 2014). As one participant in Milstein's (2015) study observes: 'I will – on the spot – change the lesson, or adapt the lesson, or say, "Okay, let's switch gears. I'm gonna stop this; it's not going the way I want it to go"' (p. 198). My study found that the well-established procedures that PTs frequently drew upon freed up both their minds and time to deal with group and individual occurrences appropriately (see Section 9.2). Post-lesson interviews revealed the complex value judgements they often had to make, either to achieve these aims or to set them aside in favour of alternative, responsive and sometimes remedial goals, such as when they discovered misunderstandings among their learners (e.g., Extract 7.9). As Borko and Livingston (1989) observe, expert teachers are 'very skillful at keeping the lesson on track and accomplishing their objectives while also allowing students' questions and comments to be spring-boards for discussions' (p. 481), what Hatch (2015, p. 128) calls 'disciplined improvisation'.

Expert teachers are only able to achieve this delicate balance between structure and improvisation because of their interactive reflection (Anderson, 2019b); Nurjahan and Kuheli characterised this ability as their 'reflection during teaching' or 'reflection-in-action' respectively, the latter drawing upon

Schön's (1983) construct. Both felt that they were aware of this happening as they taught (as were Goodwyn's (2011) and Hatch's (2015) expert teachers). These findings offer evidence that Hatano and Inagaki's (1986) influential construct of adaptive expertise plays an important role in expert teaching (also see Carbonell et al., 2014; Crawford et al., 2005). Adaptive expertise contrasts with routine expertise through its ability to respond flexibly to novel situations, allowing the expert to '[overcome] the novelty and quickly [regain] a high level of performance' (Carbonell et al., 2014, p. 15), what Anderson (2019b) calls 'micro-improvisation'. Importantly, all of these constructs offer means to understand not only how experts cope with, but also learn from the often 'messy' situations of practice that do not necessarily conform to schema encoded in either received or proceduralised knowledge (Schön, 1983, 1995). Interestingly, one of the primary means by which this adaptive expertise manifested itself among the PTs in my study – through negotiation with learners – is less salient in the expertise literature, although four studies report teachers providing choice to their learners, most often involving personal choice of task (e.g., Milstein, 2015; Smith & Strahan, 2004), rather than negotiation with the whole class. Six PTs in my study engaged in such negotiation (three frequently), occasionally of lesson content but more often of lesson structure, activity choice and process. While both Nurjahan and Kuheli justified negotiation through reference to developing learner agency and autonomy (as Milstein's participants do; 2015), this practice may be more evident among PTs than in the wider expertise literature due to specific contextual challenges (e.g., the unpredictable nature of lesson length and learner attendance; see Section 7.4.2), making this a finding of potential consequence to other contexts in the global South where similar challenges are common. It is also likely due to the irregular lesson length documented in this study (see Section 7.4.2) that only partial support was found among PTs for another robust finding in the expertise literature, that many expert teachers regularly include summaries or reviews of learning at the end of lessons (e.g., Lin & Li, 2011); PTs often only had time to issue homework instructions after their unpredictable school bells had rung.

9.10 THE INTERACTION DYNAMICS IN EXPERT TEACHERS' LESSONS

One area of classroom practice for which there was strong correspondence between my findings and those of prior expertise studies involves

Table 9.10 Pedagogy: Interaction dynamics of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Balances teacher-led (e.g., whole-class teaching) and learner-independent (e.g., activities)	Strong	Leinhardt & Greeno, 1986; Yang, 2014	Strong
Whole-class teaching (presentations, demonstrations) is interactive	Strong	Arani, 2017; Westerman, 1991	Strong
Uses independent activities (seatwork or group work)	Strong	Milstein, 2015; Smith & Strahan, 2004	Strong
Make regular use of collaborative learning (pair & group work)	Strong	Berliner, 1991; Gross, 2014	Strong
Monitors learners during activities	Strong	Milstein, 2015; Smith & Strahan, 2004	Strong
Peer-tutoring encouraged (incl. peer instruction/ correction/ feedback/support)	Strong	Chen & Rovegno, 2000; Gross, 2014	Strong

what might be called 'interaction dynamics' in the classroom – the ways in which learners and the teacher interact with each other at different stages of the lesson (see Table 9.10). This includes the often-discussed area of collaborative learning (pair and groupwork), found to be common in most PTs' and other expert teachers' classrooms (e.g., Gross, 2014) and the role of peer-teaching during collaboration (Chen & Rovegno, 2000), but also independent seatwork (when learners complete a task or exercise individually; Leinhardt, 1983), teacher support during such lesson stages (Conners, 2008) and the extent to which whole-class teaching is interactive or simply didactic (e.g., traditional lecturing) (see Campbell et al., 2004b). The first finding to note in this area is evidence of a balance between teacher-led and learner-independent activities – what Yang (2014, p. 211) calls 'directive' and 'exploratory teaching'. Such a balance was observed frequently in the lessons of six PTs, consistent with prior expertise research, which emphasises a need for both (e.g., Leinhardt & Greeno, 1986). While whole-class teaching took up a majority of time in PTs' lessons, it was invariably interactive, involving questioning, dialogue and learner performance alongside teacher explanation and recitation, as also found in the wider literature (e.g., Chen & Ding, 2018). During group work and pairwork, a key finding of my study that tallied well with prior research relates to the teacher's role during such lesson stages and the process described as active monitoring above, which incorporated

tutoring, assessing and other roles (see Section 7.5.6). For example, Smith and Strahan (2004) describe their expert teachers spending the majority of lessons circulating among students to offer tutoring support, 'bending, leaning, crouching, smiling, and nodding, both enjoying their students and building relationships with them' (p. 364), and one of Gay's (2012) teachers notes 'I have to walk around and see what they're doing and ask them questions. I'm continuously assessing them and then I know what to teach' (p. 154). More specific teacher activities conducted during active monitoring (e.g., differentiation, formative assessment; see Section 7.5.6) are discussed below.

9.11 THE PEDAGOGIC STRATEGIES OF EXPERT TEACHERS

Of twelve themes classified under pedagogic strategies (see Table 9.11), strong evidence was found both in the wider literature and in this study for seven, indicating that there is greater variability among expert teachers in this domain than others, even found within studies (see Chapter 3; also Milstein, 2015; Pepin et al., 2017; Sorensen, 2014). Themes that were shared include the tendency to build new learning on the prior knowledge of learners (Westerman, 1991), the inclusion of regular and varied questioning in class (both from teacher and learners; Borko & Livingston, 1989) and emphases on developing learner understanding of lesson content (Chen & Ding, 2018), developing learners' study skills (Hayden et al., 2020), differentiation (Goodwyn, 2011) and scaffolding (Yang, 2014).

Because of the often wide ability and motivation ranges in their classes, differentiated learning strategies and individualised scaffolding were regularly seen among PTs – consistent with findings in the wider expertise literature (e.g., Goodwyn, 2011; Hanusova et al., 2013) – frequently enabling them to challenge each learner at their most appropriate level and 'raise them up', as Nurjahan put it, respective to their diverse zones of proximal development (Vygotsky, 1987). Five PTs regularly differentiated by task (e.g., providing extension tasks to faster finishers), five frequently provided individually differentiated feedback to students, especially during active monitoring and three regularly differentiated their own language choice, using learners' languages when providing support to learners with lower levels of English proficiency; this finding was not noted from any prior expertise studies.

Table 9.11 Pedagogy: Specific classroom strategies of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Links learning to/builds learning on learners' lives and schemata	Strong	Meyer, 2004; Westerman, 1991	Strong
Makes use of inductive (e.g., problem-based/discovery) learning	Strong	Chen & Rovegno, 2000; Yang, 2014	**Weak**
Teacher questioning of learners frequent	Strong	Chen & Ding, 2018; Gudmundsdottir, 1991	Strong
Learner questioning frequent	Strong	Arani, 2017; Even & Gottlib, 2011	Strong
Explains in various ways	Strong	Gross, 2014; Schempp et al., 2002	**Partial**
Develops higher-order thinking skills (incl. creativity and critical thinking)	Strong	Chen, 2001; Torff, 2006	**Partial**
Develops learners' understanding	Strong	Chen & Ding, 2018; Traianou, 2006	Strong
Scaffolds learning effectively	Strong	Meyer, 2004; Yang, 2014	Strong
Develops learners' study skills/autonomy/metacognition	Strong	Chen, 2001; Hayden et al., 2020	Strong
Differentiation provided according to learners' needs, interests and challenges	Strong	Goodwyn, 2011; Milstein, 2015	Strong
Engages in dialogic teaching	**Limited**	Even & Gottlib, 2011; O'Connor & Fish, 1998	Strong
Engages in scaffolded text interpretation	**Not found**	-	Strong

Questioning and elicitation strategies were a common part of PTs' whole-class interactive teaching, often seen by them as means to increase engagement and build understanding, consistent with prior research (e.g., Chen & Ding, 2018; Traianou, 2006). However, a difference to the wider literature was noted in this area; while several prior expertise studies identified a strong focus on higher-order questioning and critical thinking skills among experts (e.g., Torff, 2006; Varrella, 2000), this was less obvious among PTs, observed regularly only in Kuheli's classes and sometimes in Dipika's (see Table 7.3) and Nurjahan's. Other PTs were more likely to ask lower order questions and elicit key facts, most typically to assess and scaffold learner comprehension of text and content using a variety of both open and closed questioning. This often occurred alongside more dialogic interaction, in which learners also asked questions and initiated conversations. Dialogic teaching of this type is less evident in prior expertise research (exceptions include Even & Gottlib, 2011; O'Connor & Fish, 1998). In the contexts where

Figure 9.1 One of Shekhar's students engaged in a classification task (Grade 9)

it was most often observed in my study (Gajanan, Manjusha and Raju), classes were comparatively small and teacher-student interactions were more informal.

A related difference between PTs' practices and those reported in the wider expertise literature concerns the use of inductive learning in the classroom. While a number of expert teacher studies reference the regular use of discovery or problem-based learning (e.g., Chen & Rovegno, 2000), these were rarely observed in PTs' classes. The majority of individual and collaborative activities that they provided focused primarily on text comprehension, awareness of literary devices and language meaning. Occasional problem-solving activities mainly involved classifying (see Figure 9.1), comparing, exemplifying and explaining, all typically considered lower order skills in Bloom's taxonomy (see Figure 9.2). Despite this lower-order focus, these activities invariably engaged learners well – unsurprisingly so, when contrasted with the more typical memorisation and lockstep practices that many of them were used to (also see Section 4.6.4).

Figure 9.2 Participant teachers' primary cognitive focus: understanding
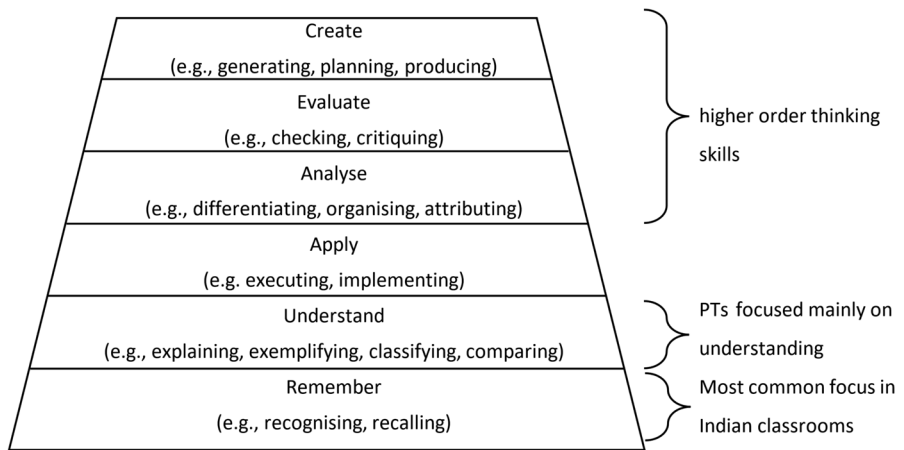
The observations noted above indicate that, when analysed from the perspective of Bloom's revised taxonomy (Anderson et al., 2001; see Figure 9.2), PTs' primary focus on understanding differed both from the lower cognitive focus of their peers (for whom remembering predominated) and from the higher-order focus often reported from higher-income contexts, with Kuheli (more privileged context) as the primary exception. It seems reasonable to conclude that in contexts such as Indian secondary education, where curriculum content is typically highly ambitious (Bhattacharjea et al., 2011; Pritchett & Beatty, 2015) and basic understanding remains a challenge that often precipitates rote memorisation practices (Bhattacharya, 2013; Meganathan, 2018), expert teachers may prefer to defer the focus on higher-order skills, particularly if these are rarely tested in examinations in the curricular contexts involved. This finding is of potentially great significance to teacher education and curriculum development in comparable contexts across the global South (see Pritchett & Beatty, 2012; Wang, 2011; Westbrook et al., 2013; World Bank, 2019b).

Perhaps the most striking difference in pedagogic strategies between my findings and prior expertise research concerns a text mediation strategy common in Indian classrooms (Bhattacharya, 2013; Borg et al., 2022; Meganathan, 2017) that I have called *text interpretation* above (see Section 7.5.3), for which there was no evidence from prior expertise studies. Text interpretation seems to result from the challenges that learners

Table 9.12 A path from basic to critical text interpretation

Most non-participant teachers (also see Bhattacharya, 2013; Meganathan, 2017; Padwad & Dixit, 2018)	**Basic text interpretation**	• Teacher reads and explains or paraphrases text content using mainly MEL • Teacher may ask questions to check comprehension • Dictation, copying or (occasionally) elicitation of correct answers to textbook or typical exam questions
Shekhar	**Scaffolded text interpretation**	• Review of prior learning and lead into text • Teacher reads, translates and explains text using MEL, with systematic recording of new lexis (words, expressions, etc.) on board to help learners notice and record key features of English • Some literary devices and aspects of grammar and culture are also explained and noted on the board • After each paragraph, teacher provides time for learners to take note of new lexis and ask questions while teacher monitors • Use of oral 'developmental questions' to both assess and scaffold learner understanding, sometimes with further clarification • Collaborative (small group) 'discussion' activities focusing on some feature of lexicogrammar from the text, followed by whole-class feedback
	⇩	
Nurjahan	**Independent text interpretation**	• Text introduction, including schema building and whole-class interactive teaching • Teacher-led pre-teaching of challenging lexis from the text, involving elicitation, boarding and translation • Whole-class reading (teacher reads text once aloud in English while learners follow in books) • Either independent silent reading or collaborative paired reading with focus on bespoke text comprehension questions; active monitoring by teacher to provide tuition and answer questions • Feedback to confirm answers to comprehension questions and extend learners' understanding
	⇩	
Kuheli	**Critical text interpretation**	• Text introduction, including schema building and whole-class interactive teaching • Learner-independent reading (usually silent, individual) • Pairwork tasks with focus on both text comprehension and higher-order (critical interpretation) questions with active monitoring of teacher to provide tuition and answer questions • Extensive feedback to tasks, including dynamic assessment and whole-class discussion of text, debate, peer challenges and discussion

Note. MEL = more-enabled language

experience, particularly the most disadvantaged,[4] in accessing and understanding texts in English lessons that are often well beyond their independent reading ability (ASER, 2017, 2018; Bhattacharya, 2013). It was found to be very common in non-participant teachers' classrooms and fairly common among PTs. However, important differences were noted in how PTs and their peers conducted text interpretation (see Section 7.5.3). While most teachers simply read through and translated these text for the learners, teaching them only 'to imitate, not interpret texts' (Bhattacharya 2013, p. 166), the PTs integrated a wide range of scaffolding, mediation and assessment strategies into their interpretation to facilitate both explicit learning and future understanding. When the text interpretation practices of PTs working with less and more English-proficient learners are compared, a progression can be identified from highly scaffolded support offered by the former to more independent, yet still scaffolded, reading practices promoted by the latter, as learners' English proficiency increased (see Table 9.12). While I found some prior evidence of comparable practices in the literature – Probyn discusses similar practices in South Africa (2019) – extensive personal experience in Eritrea, Rwanda and Malawi also tells me that comparable challenges are faced by learners across the global South, where I have also witnessed more and less effective text interpretation practices. In this sense, text interpretation merits further investigation as a potentially important feature of Southern pedagogy (see Section 11.2.3).

9.12 THE ASSESSMENT PRACTICES OF EXPERT TEACHERS

In the area of assessment practices, generally strong correlations were found between prior research and the activities of the eight PTs. These include the centrality of formative assessment in their practice, particularly the continuous, integrated practices sometimes characterised as *assessment for learning*[5] (e.g., Gay, 2012; Gross, 2014; Lin & Li, 2011), evidence that prior knowledge is frequently assessed before new instruction (e.g., Meyer, 2004;

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[4] Such learners are often first-generation school-goers, whose parents have little or no literacy and less ability to support and monitor learning (see Section 4.1).

[5] See Assessment Reform Group (2002, p. 2), who note that 'tasks and questions prompt learners to demonstrate their knowledge, understanding and skills. What learners say and do is then observed and interpreted, and judgements are made about how learning can be improved'.

Table 9.13 Pedagogy: Assessment practices of expert teachers

Finding/theme	Evidence from prior research	Example prior studies	Evidence from my study
Formative assessment is central to practice	Strong	Carter et al., 1987; Hayden et al., 2020	Strong
Continually assessing throughout lesson (e.g., through questioning and monitoring)	Strong	Asaba, 2018; Lin & Li, 2011	Strong
Assessment of prior knowledge precedes new instruction	Strong	Meyer, 2004; Westerman, 1991	Strong
Provides useful (qualitative) feedback regularly and appropriately	Strong	Blackwell, 2020; May & Curtner-Smith, 2020	Strong
May use non-verbal, visual cues to assess learning	Strong	Webb et al., 1997; Wolff et al., 2015	Strong
Includes focus on exam tasks and/or awareness raising of these	Strong	Gross, 2014; Yang, 2014	Strong
Engages learners in assessment process (e.g., self-assessment, peer assessment)	Strong	Chen, 2001; Hayden et al., 2020	Strong

Westerman, 1991) and evidence that expert teachers offer meaningful qualitative feedback to learners on their work (e.g., Bond et al., 2000; May & Curtner-Smith, 2020). In this last area, however, the extent to which PTs were able to provide extensive qualitative feedback varied according to class size and learner proficiency; while almost all PTs were adept at monitoring learner activity work quickly enough for them to offer oral feedback to the majority of learners or groups in the time given, such feedback was necessarily more limited in larger classes, in written work particularly. While Kuheli spent large amounts of her free time marking her students' more extensive written work (due to their higher English proficiency), others were more likely to provide brief annotations[6] and to offer whole-class guidance on common errors or challenges, either at the end of an activity (e.g., Dipika, Shekhar) or through subsequent remedial instruction (e.g., Vinay) if significant challenges were observed.

Excluding Dipika's (institutionalised) use of progress tests, comparatively little formal formative assessment (e.g., achievement tests) was observed among the eight PTs, although these are also conspicuous by their absence in the wider teacher expertise literature (Bevins, 2002; Hatch, 2015), indicating that

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[6] Dipika, for example, had over seventy learners in two of her classes, making it difficult for her to provide detailed individual annotation of learner notebooks on a regular basis.

either it is uncommon among expert teachers or overlooked. As Hatch (2015, p. 104) observes, 'although the participants did not seem to possess negative attitudes toward standardized assessment, this type of assessment simply did not appear to be as useful in planning day-to-day instruction as informal assessment practices' (also see Bevins, 2002).

9.13 SOUTHERN TEACHER EXPERTISE AND LEARNER-CENTRED EDUCATION

Perhaps one of the most frequently debated questions with regard to effective teaching practices in the global South concerns the degree to which such practices are, or should be, consistent with those advocated in 'child-centred' or 'learner-centred' models of education (LCE) that are frequently promoted through change initiatives in developing countries (see, e.g., Alexander, 2008; Schweisfurth, 2013a; Tabulawa, 1998, 2003; Wedell, 2022). This concluding section of the chapter steps aside from the task of comparing the findings of this study to the wider teacher expertise literature to consider the extent to which the eight participant teachers can be seen to be learner-centred; it does so by comparing their practices to conceptualisations of LCE in the literature. This issue is of particular relevance in India, given references to LCE in key policy (e.g., Government of India, 2020) and evaluation (e.g., NCERT, 2013) documents, change initiatives involving aspects of learner-centred pedagogy (e.g., TESS[7]) and reports of challenges concerning the implementation of such initiatives (Brinkmann, 2015; Sriprakash, 2012). The discussion below adopts Bremner's (2021) empirically derived 6-aspect framework for LCE as a contingent definition (p. 181, summarised):

LCE involves:

1. Active participation of learners, including interaction

2. The learning of relevant skills (e.g., real-life and higher-order skills)

3. Adaption of instruction to learners' needs (including human needs)

4. Power sharing between teacher and learners

5. Learner autonomy (including development of metacognition)

6. Formative assessment

[7] Teacher Education through School-based Support. See www.open.edu/openlearncreate/course/index.php?categoryid=45

In several areas, PTs' practices can be clearly seen to be further along the cline towards LCE than those of non-participant teachers observed, albeit to varying degrees (see Chapter 8). Perhaps the most obvious of these is the much higher likelihood of PTs providing learners with independent learning activities (as manifestations of *active participation*, *power sharing* and *autonomy*), and the time, space and necessary support through active monitoring (*adapting instruction to learners' needs*), to complete them. While such activities were occasionally observed among non-participant teachers, they were often rushed and only once conducted collaboratively, with little success. Among PTs, such activities were more often collaborative and invariably successful insomuch as most learners worked autonomously and interacted together well, although there was also variation here (see Section 7.5.5). Secondly, all PTs, in diverse ways, were seen to be *adapting* curriculum content *to learners' needs* (including their interests and ability levels), by personalising content, drawing parallels to learners' lives and experiences, and sometimes replacing textbook activities with more appropriate alternatives that also took into account their interests (e.g., Manjusha's sewing and cooking materials) and capacities (e.g., Shekhar's and Gajanan's simplified alternatives to textbook exercises) – this was rarely seen in non-participant teachers' lessons. As a result of this, PTs typically took longer than comparable peers to 'complete the syllabus', evidence of their teaching progressing more at their learners' pace than that of their colleagues. Further, *formative assessment* was regularly observed in PTs' classrooms, typically informal and integrated dynamically into whole-class instruction (e.g., through questioning) and independent activities (e.g., while monitoring). In other areas, evidence was more mixed. The regular negotiation that most PTs engaged in constituted examples of *power sharing* practices, offering learners more control than is typical in Indian classrooms, although this was usually limited to the 'how', rather than the 'what' of learning. Further, the extent of PTs' integration of practical (*real-life*) and *higher-order skills* in their teaching varied, with only Kuheli focusing frequently on the latter, and most prioritising exam skills as much as practical language use skills. Thus, while the practices of all PTs were generally more learner-centred than comparable peers, it would be an oversimplification to attempt to use this construct as the primary means for characterising commonalities among them. Most also made frequent use of teacher-led (albeit interactive) whole-class instruction, with the content defined primarily by the curriculum and the selection, sequencing and pacing primarily by the teacher. With perhaps three exceptions (Vinay, Manjusha and Gajanan), this

Table 9.14 Learner ranking of ten qualities of a 'good teacher'

Rank order	Qualities of a 'good teacher'	Mean rank score[1]
1	Explains things very clearly so that we all understand	4.08
2	Helps all of the students equally	4.11
3	Corrects our work and helps us to improve it	4.70
4	Helps us to prepare for examinations well	5.06
5	Asks many questions to the students	5.58
6	Knows their subject well	5.74
7	Plans lessons carefully	5.77
8	Tells students to work in pairs and in groups	5.90
9	Is kind and cares for the students	5.93
10	Plays many games in class with the students	8.14

Note. Mean ranks provided are for 99 groups of 3–5 learners.

constituted generally strong 'framing' in the Bernsteinian sense of the term (2000; see Section 8.6).

Further, definitions of learner-centredness (Bremner, 2021; Schweisfurth, 2013a) rarely emphasise what was arguably the most powerful commonality among PTs: the safe, supportive, relationships of trust, respect and enjoyment that they all cultivated in their classrooms; what Bremner (2021, p. 174) calls the 'humanistic role' was found to be rare in definitions of LCE. Even considering variation observed among PTs, these relationships were usually much more parental and compassionate than 'democratic' (Schweisfurth, 2013a, p. 12), born of a humanistic desire to lead and guide, more than a need to offer up control to their learners. What is more, clear evidence emerged that the majority of PTs' learners did not seem to want more control over the learning process. On several occasions, Manjusha, Gajanan and Nurjahan had to convince their students – even overrule them (ironically) while negotiating – that they would do something more collaborative or specific to their personal interests after the learners had requested either teacher-led reading or exam practice. Most telling in this regard are the findings of the learner focus group task in which they were asked to rank 10 qualities of a good teacher. On average, across all PTs, learners prioritised characteristics that indicated a stronger preference for transmissive, teacher-led, yet equitable pedagogy (see Table 9.14), findings that tally with those of Canagarajah's earlier research in Sri Lanka (1999).

Learners' perceptions of teacher role are likely to be conditioned by all the teachers they are exposed to, and this may cause them, on average, to expect less learner-centred instruction than the PTs were providing. It may be that these expectations, alongside those of colleagues, parents and institutional norms (a *habitus* of sorts; Bourdieu, 1977; as discussed in Chapter 8), served to limit the extent to which some PTs were able to develop a more learner-centred pedagogy. As such, it was revealing that Vinay's learners, who experienced collaborative learning more than others, ranked the use of pair and group work lowest on average (m = 7.8; 12 groups) of all PTs' pupils.

9.14 CONCLUSION

This chapter has compared the practices, cognition and attributes of eight Indian secondary teachers identified as experts of their context to the wider, extensive literature on teacher expertise originating almost entirely in the global North. It has done so in an attempt to understand the extent to which teacher expertise may be different in the more challenging contexts typically found in the global South. It has also attempted to shed light onto possible reasons for any differences identified, looking primarily at the varied challenges that typify educational systems, classroom environments and learner and teacher experiences in Southern contexts, including India, as identified in Chapter 4.

In a number of the domains discussed in this chapter, a high level of agreement between the findings of my study and those most salient in the expertise literature has been found. This is particularly true in two areas of teacher cognition concerning knowledge and cognitive processes; only two small differences were apparent in problem-solving ability and self-regulatory knowledge. More importantly, this study offers strong support for prior evidence of an integrated knowledge base and efficient cognitive processes – both automated and responsive – underpinning teacher expertise; findings that are broadly consistent with expertise research across all professional domains (see Ericsson, 2018). Comparatively few differences were found in the areas of personal attributes and professionalism of expert teachers. In both domains, the evidence indicates strongly that experts are committed, capable professionals who work hard to continue learning, support others and challenge themselves; values that are underpinned by a moral imperative and sense of duty towards their learners. While two differences in interpersonal practice were noted, these related to specific findings of my

study that have possibly gone unreported in the wider literature – this was overshadowed by clear evidence in both datasets that expert teachers cultivate positive, supportive learning environments and close relationships with learners. There were also several areas of classroom practice in which the salient findings of my study corresponded well with the wider literature: interaction dynamics, assessment practices and how expert teachers balance between structure and flexibility.

In other domains, while there was still ample agreement between the two datasets, differences were greater. This includes the findings on expert teachers' beliefs and two areas of pedagogic practice (lesson planning and classroom strategies), where differences were often attributable to specific contextual challenges that the teachers faced (e.g., their felt need to focus on confidence building rather than setting high challenges for disadvantaged learners, or their lack of ICT integration in the classroom caused either by a lack of functioning equipment or a lack of access). However, the most striking difference came in the teachers' languaging practices, where the only prior evidence for multilingual instruction in expertise research came from Toraskar's study (2015), also conducted in India. This difference is obviously linked to contextual factors; most obviously the highly multilingual environments in which the PTs work, but also necessitated in part by the challenging foreign language curricula that they face and their learners' lack of exposure to English at home or in wider society – a reality shared by the vast majority of learners in India (Annamalai, 2005; Mukherjee, 2018) and many across the global South (Simpson, 2019).

The chapter has also briefly explored the extent to which the practices of the participant teachers in my study are consistent with the edicts of learner-centred education, which are frequently promoted as models of good practice across the global South. While evidence emerges that the eight participant teachers were in a number of ways more learner-centred than their colleagues, this must be offered on the background of significant variation among the eight teachers themselves, and a number of common shared practices that would, in the eyes of most proponents of learner-centred education, be classified as 'teacher-centred', such as the whole-class text interpretation strategies, the stronger focus on lower order skills and the general lack of democratic decision making observed in participant teachers' classrooms. It is also important to note that the wider expertise literature does not wholeheartedly support learner-centred pedagogy, more often reporting a more complex balance between teacher-led and learner-independent learning within what is typically a carefully circumscribed environment of

routines and rules (e.g., Bevins, 2002; Borko & Livingston, 1989; Leinhardt & Greeno, 1986; Tsui, 2003); expert teachers, it seems, are only sometimes learner-centred (Anderson & Taner, 2023).

Without setting aside the provisos made at the start of this chapter that the comparison conducted here has necessarily involved a number of levels of interpretation on my part as a researcher that will have influenced the findings presented, this chapter has identified both numerous similarities and important differences between the expertise of the eight participant teachers and that reported in the wider literature. Many of the differences involved can be seen to relate to (often resulting from) the influence of contextual circumstances, challenges and affordances that typically vary between Southern and Northern classrooms. Thus, while it is important to avoid extrapolating from the findings of one study in one country to a wider, contested context type (the 'global South'), and important to avoid putting rigid borders around practitioner communities in a globalised world, I argue that the evidence presented here has demonstrated a clear justification for the building of a wider framework of teacher expertise that is inclusive of all teaching contexts around the world, and not based solely on research conducted in more privileged contexts. Chapter 10 will address this challenge.

10   Updating the Expert Teacher Prototype

A Differentiated Framework

…there exists no well-defined standard that all experts meet and that no nonexperts meet. Rather, experts bear a family resemblance to one another and it is their resemblance to one another that structures the category 'expert'. A convenient way of talking about such categories is in terms of a prototype that represents the central tendency of all the exemplars in the category.

> (Sternberg & Horvath, 1995, p. 9)

It is axiomatic that, in order to build a prototype of a construct such as 'expert teacher', one needs to understand the full diversity among manifestations of the construct and then build the prototype inductively with all these exemplars in mind. In their discussion of the expert teacher prototype, Sternberg and Horvath's (1995) focus was on American public schools with an aspiration to make them 'centers of excellence' (p. 9). Since Sternberg and Horvath's work on the prototype, a number of potential alternative centres of excellence in teaching have come to prominence around the world (e.g., Finland, Shanghai and Singapore; see Crehan, 2016); centres that, according to some measures of quality (e.g., PISA and TIMSS tests[1]), outperform those of the US. As such, it can no longer be assumed (if it ever could) that

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[1]   Programme for International Student Assessment (www.oecd.org/pisa/) and Trends in International Mathematics and Science Study (https://timssandpirls.bc.edu/), respectively.

Western/Northern models of teacher quality should apply to the rest of the world, prompting us to look more widely to understand teacher expertise as a global phenomenon.

While the primary goal of this book is to offer a description of teacher expertise in the global South, it can only do this relative to manifestations of expertise in the North, given the complex relationship between the two and the origins of contemporary national systems of education in the latter (Albisetti, 2019; Kumar, 2005; VanderVen, 2019). The careful comparison of these conducted in Chapter 9 makes it possible to offer a revised prototype of the expert teacher that is inclusive of its wider range of manifestations around the world. Based on the research reviewed and reported in this book, this chapter presents an early draft of a proposed differentiated framework for understanding teacher expertise, one that summarises both the most commonly reported features of expert teacher cognition and practice irrespective of context and those features that do indeed seem to vary, with a focus on areas of potential Southern variation. It also offers a number of suggestions for applications and uses of such a framework in teacher education, curriculum development and future research.

10.1   TOWARDS A DIFFERENTIATED FRAMEWORK OF TEACHER EXPERTISE

The prototype model of expertise developed by Sternberg and Horvath promulgates a tendency to look for shared characteristics as features of interest and generalisability – the so-called family resemblances of expert teachers. Unsurprisingly, therefore, there are many expertise studies that focus only on such similarities (e.g., Bevins, 2002; Gay, 2012; Hatch, 2015). Yet, as the evidence presented in my research and elsewhere indicates (e.g., Bucci, 1999; Milstein, 2015), there are also important differences among expert teachers, some of which seem to be influenced by contextual factors (e.g., educational system, stage of education and institution type) and others by individual variation between the teachers themselves, evident even within a given context. Thus, to fully understand teacher expertise, we need to understand which aspects of it are practitioner- or context-independent (or seem to be so, in the absence of contrary evidence), which aspects vary, and how and why they do. The initial framework presented below attempts to do just this. It is offered only as an initial draft of a

'work in progress', particularly with regard to Southern expertise. This is particularly important to stress given that the original data offered here emerges from only one study (albeit a multisite study) in one national context (albeit an important one that is fairly typical of the global South) and involving only one subject – all of which are likely to have influenced the framework to some degree. Nonetheless, when this evidence is compared and combined with the systematic reviews of prior research into teacher expertise (in Chapter 3) and effective teaching in low-income contexts (in Chapter 4), it becomes possible to present a number of useful findings with a degree of confidence that is likely to be insightful, providing the framework is recognised as contingent and unfinished.

Table 10.1 presents the framework, adopting the same twelve categories used in Chapter 9. The 'Generalisable' column presents the most robust findings from the wider expertise literature review (Chapter 3; also see Anderson & Taner, 2023) that seem to hold true independently of educational stage (primary, secondary and tertiary) or national context, also strongly supported by my study (Chapter 7). These are the key 'family resemblances' of expert teachers; they are not necessarily true of all expert teachers, but they are frequent findings of studies that investigate the category focus in detail, and also often reported as shared features from multiple case studies. The next 'Variable' column indicates areas where my research, including my systematic analysis of prior expertise and effectiveness studies, has identified important areas of variance among expert teachers, due either to contextual or personal factors (see Chapter 9). The final 'Southern' column presents features of expert teachers that were prominent across multiple participants in my research, sometimes supported by prior research on teacher effectiveness in low-income contexts, yet rarely reported from studies conducted in higher-income contexts.[2] Throughout the framework, I have tried to balance between brevity (to keep it succinct) and clarity, both regarding the themes involved and my need to hedge, particularly in the last two columns, where evidence for an assertion is limited. Given the unfinished nature of the framework, it is to be expected that the number of components in each column will likely grow as further research is conducted in the future (discussed below).

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[2] This does not mean that such features are not present in Northern teachers, but that they are less often reported on as core components of their expertise.

Table 10.1 A differentiated framework of teacher expertise

Category	Components		
	Generalisable	Variable	Southern (provisional)
Knowledge base	• extensive, integrated knowledge base • knowledge of learners is central • PCK is learner-oriented • subject, curriculum and pedagogical knowledge are prerequisites • knowledge is context specific	• how knowledge of learners is stored: individually or in a group picture	• large class contexts may dictate need for group picture
Cognitive processes	• automated heuristics free up key cognitive resources • high awareness of relevant occurrences • ability to respond appropriately • progressive problem solving	–	–
Beliefs in…	• a sense of moral duty • constructivism • close relationships with, knowledge of, and respect for learners • engaging and motivating learners • accepting primary responsibility for learning • treating learners as individuals • avoiding labelling learners	• whether belief in challenging learners or building confidence is stronger influence • whether belief in prioritising understanding or HOTS is prominent • whether beliefs relating to multilingualism are prominent	• building learner confidence • reducing learner 'fear' of sanction • multilingual inclusion • prioritising understanding
Personal attributes	• passion for and enjoyment of work • care for/love of learners • strong identity/self-image • strong desire to succeed • independence	• strong emotions (resulting from high personal standards) in some contexts	• resilience • flexibility
Professionalism	• dedication to work • collaboration with, and support for colleagues (often in leadership roles) • lifelong learning incl. sustained interest in CPD • innovating, experimenting and challenging self • extensive reflection underpinned by sense of responsibility	• CPD activities may be dependent on opportunities • importance of critical reflection may be culturally linked	• exploiting all opportunities for developmental support (e.g., training, feedback) • able to develop in isolation if required
Interpersonal practices	• creating positive, supportive learning environments • building meaningful relationships with learners • regular positive reinforcement • engaging and stimulating learners effectively	• balancing between challenging learners and building confidence • prominence of learner welfare and safeguarding may be context dependent	• prioritising confidence building • prioritising learning without fear
Languaging practices	– [insufficient evidence]	• how context (e.g. institutional/curricular norms) influences extent of multilingual practices • possible need to integrate all learners' languages in learning	• inclusive towards other languages • facilitating multi/translingual discourse

Table 10.1 (cont.)

Category	Components Generalisable	Variable	Southern (provisional)
Lesson planning and preparation	• Planning is flexible, contingent, and ostensibly mental • Considering both learners' needs and long-term objectives • Supplementing curriculum content with own activities and/or resources	• quantity of planning may vary • use of written plan dependent primarily on context • curriculum coverage may be selective • extent of use of TLMs and ICT may depend on time and resource availability	• time challenges may impact planning • contingency planning necessary • selective prioritisation of certain curriculum components may be necessary • resourceless activities may be prioritised • ICT use may be limited
Balancing between structure and flexibility	• balancing between structure and flexibility effectively • interactive reflection informs key decisions in class • clear routines and procedures • adaptive expertise key to flexibility • constant awareness of aims (incl. extent of achievement)	• learner consultation may vary in type and degree • complexity of structuring elements dependent on contextual factors	• potentially stronger need for negotiation with learners • some structuring activities may be compromised by uncertainties (e.g., lesson length)
Interaction dynamics	• balancing between teacher-led and learner-independent activities • interactive whole-class teaching • use of independent activities through seatwork, pairwork and group work • active monitoring by teacher including tutoring, assessing and managing roles • encouraging peer-tutoring	• use of collaborative learning influenced by context (e.g. class size, institutional norms) • extent and type of peer-tutoring may vary	• collaborative learning may be less urgent in very small classes or challenging in very large classes • active monitoring may increase in importance in larger classes
Pedagogic strategies	• building new learning on prior knowledge • regular, varied questioning • ensuring learner understanding • emphases on differentiation and scaffolding • emphasis on study skills	• focus on HOTS or LOTS context, curriculum and MOI dependent • differentiation may include language choice • use of discovery learning context dependent • use of mediation strategies context-dependent	• the need to prioritise understanding may defer focus on HOTS • scaffolded mediation strategies (e.g., text interpretation) may be required, esp. among most disadvantaged
Assessment practices	• formative assessment is central and integrated into teaching (assessment for learning) • assessment of prior knowledge precedes new instruction • qualitative feedback is provided • engages learners in assessment processes	• opportunities for and extent of qualitative feedback dependent on class size • formal formative assessment (excluding exam task practice) may be less common	• individual feedback may be less frequent in larger classes • stronger focus on generic problems or use of remedial instruction

10.2 THE COMPONENTS OF THE FRAMEWORK

While the component features of the framework are presented as separate bullet points, the reality is that, both within and between table rows, these features are well connected and operate in an integrated fashion. The features included in each category are clarified briefly here.

Concerning expert teacher knowledge, the primary generalisable component is the extensive, integrated knowledge base, including PCK, as identified widely in expertise studies. Knowledge of learners is emphasised as central, including to pedagogical content knowledge (what I have termed 'learner-oriented' PCK). Given findings both in the wider literature and my research that expert teachers may store knowledge of learners either individually or as a 'group picture' (Carter et al., 1987), this is included as a potential variable component. While not exclusive to the global South, teachers of multiple large classes may need to store such group pictures. The category 'Cognitive processes' is the only one where evidence was not strong enough to suggest any potential variable components. The first three of the four elements presented here seem to be fully integrated and likely to operate unconsciously (Bond et al., 2000; Borko & Livingston, 1989), while progressive problem solving may be a more conscious process, linked to adaptive expertise and recalling aspects of Schön's reflection-in-action (1983). Given that there is generally very little variation in how expert teacher knowledge and cognitive processes are described in the research literature, these two elements can be considered the largely invariable cognitive core of teacher expertise.

Expert teacher beliefs seem to show more variability, perhaps unsurprisingly given the clear and obvious links to sociocultural factors (see Section 9.3). While beliefs can never be assumed to be consistent with practice (the 'espoused beliefs' versus 'theories-in-use' distinction; Argyris & Schön, 1974), there is generally strong correlation between these in expertise studies (e.g., Azal & Harun, 2020; Gay, 2012); as a result, several of these beliefs mirror practices in different rows of the table, others are closely integrated with other features, such as the relationship between expert teachers' sense of moral duty (belief), their care for or love of their learners (personal attribute) and their tendency towards extensive reflection (aspect of professionalism), as discussed in Chapter 9. There are two potential areas of contrast in prioritised beliefs here: whether challenging learners or building learner confidence is prioritised, and whether higher-order thinking skills (HOTS) or understanding is prioritised, with evidence from both my study and research in other

low-income contexts (e.g., Addy et al., 2012) that the latter of both pairs may be prioritised in Southern contexts. Reducing fear, often a prominent focus in the South (UNESCO, 2017), is included in the final column as an environmental and interpersonal prerequisite for building learner confidence. Given that the only two extensive expertise studies in Southern contexts (mine and Toraskar's, 2015) have both found beliefs in multilingual inclusion to be potentially important, yet this is not mentioned from other contexts, this is also included in the final column. Nonetheless, it is likely to be true wherever expert teachers are required to teach in (or at least towards) exogenous media of instruction – very common in the South, but also increasing in the North (e.g., in English medium instruction (EMI) institutions).

The personal attributes of expert teachers overlap with other categories in complex ways, particularly beliefs (compare 'care' and 'respect' for learners) and professionalism (compare 'passion for' with 'dedication to' work). While identities vary and change over time, a sense of confidence in identity comes through frequently among expert teachers, closely linked to the other attributes in this category (see, e.g., Campbell, 1991). Although resilience emerges as important in a range of contexts, it seems to be amplified as a personal attribute in more challenging contexts (Anderson, 2020d), as might be expected, and links closely to the need for flexibility in unpredictable circumstances (see Chapters 7 and 9).

With regard to professionalism, key elements include the dedication, collaboration, reflection and continuous interest in learning of expert teachers. Critical reflection is not always as evident in the literature as extensive reflection (including in my study) and may link to both personality and cultural norms. Because of wide variation in opportunities to engage in CPD, particularly collaboratively, this is seen as a variable of interest, with active interest in CPD activities – often limited in the South – emphasised in the final column. Given that several of the participants in my study were, at times, forced to develop in isolation, this is also identified as potentially important to Southern expertise.

Research on the interpersonal practices of expert teachers consistently reveals the importance of both positive learning environments and meaningful relationships with learners as key to learning, with engagement also emphasised and linked frequently to teacher personal enjoyment (as a personal attribute). As with beliefs, a key variable feature here is the extent to which expert teachers either challenge and push their learners (typically a finding in higher income contexts) or keep them within a safer 'comfort zone' and focus on building confidence (found in both my study and others

in challenging contexts; e.g., Addy et al., 2012). Because of variation between contexts, often at system level, in responsibilities, roles and vulnerabilities concerning learner welfare and safeguarding (e.g., whether education welfare officers exist), there is likely to be a greater need for expert teachers in some contexts, particularly in the South, to emphasise learning without fear (e.g., where corporal punishment is practised). Likewise, because of learner background vulnerabilities and the difficulty of accessing education in many Southern contexts, the strong focus on engagement with parents to ensure attendance and parental support for learning among expert teachers also warrants mention here.

A lack of wider evidence leads to no generalisable components being listed concerning the languaging practices of expert teachers; this is an area where more expertise research is needed, particularly in multilingual communities in both the North (e.g., superdiverse urban environments) and other Southern contexts – this is an obvious area of context-dependent variability. However, given the evidence from both Toraskar's (2015) and my research, two potential features of Southern expertise are included, both consistent with the findings presented by Anderson (2022b).

Moving onto pedagogic practices, the category of lesson planning and preparation is the first where variation is more prominent than similarity. While three frequently identified areas of similarity between expert teachers offer useful insights, there seems to be significant variation, both on individual (e.g., quantity and type of planning) and contextual (e.g., whether written plans are expected) levels. Two other areas of variation are suggested: the extent to which curriculum coverage needs to be selective and whether expert teachers make use of TLMs and ICT – both depend on resource and time availability, which are also context-dependent. Five areas where expertise may vary in Southern contexts are identified: the impact of time availability on planning opportunities; the likelihood of uncertainties (e.g., student attendance, lesson length and timetable changes) necessitating higher levels of contingency planning; the need for selective prioritisation of key curriculum components in contexts where curricula are inappropriately ambitious for some or most learners; the need for resourceless activities (especially to supplement curriculum component or a lack of TLMs); and the lower likelihood of functioning ICT resources.

Less variation is evident in the category covering how expert teachers balance between structure and freedom. It is notable that the flexibility in the classroom practices of expert teachers, as often reported in the literature, exists in balance, rather than tension, with the need for clear routines

and procedures (the latter possibly more prominent at primary levels; see Anderson & Taner, 2023). Thus, this is also the category title and is underpinned by an ability to reflect while teaching (i.e., interactively[3]) so as to – as much as possible – not lose sight of planned (i.e., preactive) aims and intentions. While there was comparatively little variation in the expertise literature in this area, given reported differences in how agency is given over to or negotiated with learners (see Section 9.9), including individually (see Section 8.3), this was assessed as an area of potential variability, with the two components in the final column influenced primarily by the external precarities (e.g., lesson length, learner attendance and timetabling changes) that also influence planning practices.

In the area of interaction dynamics (i.e., who interacts with whom during different activities), there is extensive evidence of expert teachers balancing between teacher-led (e.g., whole-class teaching) and learner-independent (collaborative learning and seatwork) lesson phases, albeit with wide individual variation (see Section 7.5.5). While teacher active monitoring (see Section 7.5.6) during learner-independent activities is a frequent finding that does not depend on the use of collaborative learning (it also occurs during individual seatwork), peer-tutoring is dependent on pair and group interaction, and necessarily varies with the prevalence of collaborative learning. Given evidence from this study, corroborated frequently by personal experience, that some institutions, particularly in the South, discourage teachers from collaborative learning interactions, this is likely to be a contextual variable – one that is also often referenced in research and theory on 'cultural' differences in education (e.g., Nguyen-Phuong-Mai, 2019). Both very large and very small class sizes may impact on the feasibility of, or necessity for, collaborative learning. While neither is unique to the global South, larger variation in class sizes may result from challenges of access and student mobility (Porter et al., 2011).

The category 'Pedagogic strategies' includes a range of areas of teaching practice often reported from expertise research. There seems to be quite a high level of variation here, much of which is context-related. The strongest shared tendencies reported include the high likelihood of expert teachers building new learning on prior knowledge/schemata (which was closely linked to an assessment practice – assessment of prior knowledge precedes

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[3] In the framework I have chosen the term 'interactive reflection' to mean 'reflection while teaching', rather than 'reflection-in-action' due to ambiguities in the meaning of Schön's term (see Anderson, 2019b; Eraut, 1995).

new instruction), the regular use of varied types of questioning (open/closed/ expository/interpretive, etc.) and a focus on ensuring learner understanding of new content. Also prominent were a range of differentiation and scaffolding strategies (grouped together here insomuch as they often focus on individual support needs) and an emphasis on developing learners' study skills. One noticeable variable discussed in Chapter 9 was whether expert teachers focus primarily on HOTS or LOTS, consistent with their beliefs (above); a factor that is dependent on both the curriculum (what it contains and how challenging it is for the learners) and the language medium (how proficient the learners and teacher are in it). A related variable is also included here – that, in multilingual classrooms, expert teachers may also differentiate in their choice of language. Both these variables seem to exhibit complex (both direct and indirect) associations with level of learner disadvantage. Also apparently context dependent are the extent to which expert teachers make use of discovery learning (reported primarily from higher-income contexts) and their use of mediation strategies, which may be more heavily scaffolded in Southern contexts.

For the final category, assessment practices, a fairly high level of consistency was found across the varied sources to suggest an emphasis on assessment that is fully integrated into classroom practice among expert teachers, in ways that are consistent with what are typically considered informal formative assessment (e.g., Ruiz-Primo, 2011) or assessment for learning (e.g., Assessment Reform Group, 2002). Also very strongly supported was the provision of qualitative feedback to learners (rather than grades, for example) to inform improvement. My finding that, as classes get larger, individualised qualitative feedback reduces is included both as a variable (arguably a logical inevitability), and as a likelihood in the final column; attempts to provide such individual feedback may be replaced in larger classes by a focus on more generic misunderstandings within a cohort or errors in student work through, for example, remedial instruction.

10.3 POTENTIAL USES OF THE FRAMEWORK

The framework aims to offer an updated (since Sternberg & Horvath, 1995) prototype of teacher expertise that, firstly, identifies those generalisable components of the model that are likely to apply across varied educational contexts worldwide and, secondly, identifies those elements that are likely to vary between contexts and practitioners. The final column offers a number of

contingent and certainly not exhaustive empirically derived additional components of Southern teacher expertise. When combined with the generalisable components of the framework, it offers something that has been lacking in the educational development literature to date (see Alexander, 2015; Pryor et al., 2012) – an initial means for understanding how teachers working in more challenging contexts can be effective practitioners without necessarily needing either to imitate exogenous practices or to wait for the 'institutional supports' that Stigler and Miller (2018, p. 434) perceive are *a priori* criteria for expertise to develop. Because it is based, in large part, on research conducted in real classrooms in challenging conditions, and corroborated by evidence from prior research in the South (Chapter 4), it is likely to have high ecological validity for comparable contexts. As such, it is a vision of expertise that does not require changes in areas such as the curriculum, the school environment or learner characteristics to work – it's one that can, so to speak, hit the ground running.

The framework is likely to be of use to researchers, scholars, curriculum developers and teacher educators, as well as independent organisations that work in or across contexts in the global South for diverse purposes. Firstly, concerning teacher education, it can offer a potential 'reality check' for pre-service curricula to ensure that sufficient focus on appropriate categories and features is offered. It provides some indication concerning the extent to which novice teachers, to become proficient, may need to balance, for example, between teacher-led and learner-independent instructional activities, between lower and higher-order thinking skills or between building learner confidence and setting high standards. Concerning in-service teacher appraisal and support, the pedagogic practices described in the framework can serve as a tool to assess pre-existing criteria used to evaluate teachers by inspectorates and senior staff to ensure that these aren't inappropriately idealistic (e.g., expecting the use of extensive TLMs or detailed lesson plans) or misinformed (e.g., expecting the inflexible 'delivery' of lesson content to meet aims that may not be realistic for a given group of learners). These pedagogic practices can also serve as areas of focus for teacher training workshops, teacher development courses or teacher-led interventions such as action research and lesson study projects where considered appropriate. Likewise, curriculum developers may find the features of the framework useful to cross-check or improve current curricular guidelines, particularly concerning how teachers can manage curriculum content that is too extensive (e.g., through prioritisation of core content) or beyond the ability of learners to access independently (e.g., through scaffolded text interpretation); the framework may also inform curriculum design concerning lesson structuring, the complex

balance between meeting aims and responding to learner needs, and how this can be done, even as challenges increase (e.g., in very large classes).

Researchers may find the framework useful in a number of ways. Firstly, it can be used as a starting point for similar expertise studies in comparable contexts, both national and international. These will either support the current features in the framework or – if differences or potential additions are found – propose revisions. Where commonalities are identified, such studies can strengthen the confidence with which aspects of the framework can be used for more specific purposes (e.g., teacher education and curriculum development uses as proposed above). Secondly, it can offer areas of focus for more specific studies, including interventions for experimental studies (e.g., comparing assessment approaches used in the framework with alternatives), guided action research projects and even larger-scale changes that can be monitored and evaluated during implementation in a specific district or authority. Several of these research designs are also potentially able to evaluate the framework from the perspective of its impact on learner achievement; while this may be a dangerously limited measure of quality in education (see Section 2.3), given that it is both an outcome of interest to key stakeholders in education and a comparatively objective measure of quality, such validation of the framework would nonetheless be useful.

Finally, independent organisations (e.g., NGOs, development partners, etc.) that are involved in initiatives to improve the quality of education in Southern contexts may want to compare the framework with their current policy recommendations and 'best-practice' notions to assess the extent to which these are, or are not, in agreement. Where disagreement is found, there may be grounds not only for commissioning research into, for example, the feasibility, impact or sustainability of different practices promoted by the organisation, but also for questioning the (often exogenous) origins of certain policy recommendations, the extent to which these recommendations are justifiable, and whether alternative approaches may prove to be more realistic and sustainable in a given context.

10.4 CONCLUSION

This chapter has presented, and described the features of a differentiated framework of teacher expertise, based on the available evidence both from prior literature and from my own research. It has been possible to select the generalisable components of the framework with a degree of cautious confidence,

presenting only those that receive robust support from multiple studies in varied contexts from the literature (see Anderson & Taner, 2023). However, less evidence is available for the potential variable components and Southern components offered; as such the framework is presented as a first draft, an initial sketch only. Nonetheless, given that it is the most detailed teacher expertise prototype presented to date, it is likely to be of use in a number of ways to teacher education and teacher appraisal, curriculum development and for further research; potential areas of application are also explored above. Once more, it is important to emphasise firstly that the prototype is incomplete, particularly with regard to pedagogic practices and Southern components, and that the components identified should not be seen as a checklist of necessary and/or sufficient practices and features, but instead as the frequently shared family resemblances among expert teachers – the variations are as important as the similarities for understanding such a prototype.

11 Valuing and Building on Southern Expertise

…the understanding of the world by far exceeds the Western understanding of the world.

(Santos, 2014, p. viii)

Up to this point, this book has adopted a primarily practical-technical perspective in its inquiry into teacher expertise and its manifestations in expert teachers' pedagogic and professional practice. It has done so in order to be able to offer concrete insights into how expertise may vary in different contexts – particularly in the global South – and why, identifying contextual challenges, constraints and affordances as 'explanatory' factors. This has enabled me to offer practical recommendations, for example, through the framework provided in Chapter 10, that may be of use to individuals, departments and organisations working in education in Southern contexts – this is my primary aim, and therefore takes up the majority of this book.

In this final chapter, I would like to step back from this contribution in order to address two wider questions. The first concerns ongoing discussion in social science regarding what is often referred to as 'Southern theory', its relation to Southern practice and the extent to which the approach adopted and evidence gathered in this book contribute to this discussion. This is built on in the latter part of the chapter, where I outline how I feel future expertise studies can contribute to a wider research agenda that also incorporates other types of research, both qualitative and quantitative, participatory and non-participatory, which may enable researchers working within specific educational systems around the world (particularly, but not only, in the

South) to build appropriate, evidence-based, endogenous models of teacher expertise that will serve a variety of local purposes.

11.1   SOUTHERN THEORY IN SOUTHERN PRACTICE

The term 'Southern theory' was first popularised by Raewyn Connell in her 2007 book of the same name, and expanded upon both by herself (e.g., 2014, n.d.) and others (e.g., Hickling-Hudson, 2009). She describes Southern theory as 'social thought from the societies of the global South' (n.d., para. 1) and sees the broad goal of Southern theory work being 'to develop new knowledge projects and new ways of learning with globally expanded resources' (2014). Connell notes that there exists a large and diverse range of theories (plural) emerging from marginalised communities and individuals around the world (the periphery), and she draws attention to a number of largely neglected Southern authors, emphasising that the work of such authors must be taken seriously in social science 'as texts to learn from, not just about' (2007, p. viii).

Similar arguments have been made by other writers, particularly Boaventura de Sousa Santos (e.g., 2014, 2018), a post-colonial thinker who argues that the numerous ways of knowing and understanding the world that exist outside the boundaries of mainstream (Northern and Western) theory and debate have been neglected both because they do not fit Northern paradigmatic assumptions of what theory is and because they are produced by marginalised, often Southern, authors, whose concerns, lives and work are located on the wrong side of an 'abyssal line' that divides metropolitan from colonial societies (e.g., 2014). His extensive discussion of epistemologies of the South[1] makes three broad contentions:

1. The understanding of the world by far exceeds the Western understanding of the world;

2. There is no global social justice without global cognitive justice;

3. Emancipatory transformations in the world may follow grammars and scripts other than those produced by Western-centric critical theory, and such diversity should be valorised.

<div align="right">(2014, p. viii, summarised)</div>

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[1]   'Epistemologies of the South' are defined as 'the ways of knowing from the perspectives of those who have systematically suffered the injustices, dominations and oppressions caused by colonialism, capitalism, and patriarchy' (Santos, 2016, p. 18).

Connell and Santos, therefore, have a key concern in common, also shared by others (e.g., Comaroff & Comaroff, 2012b; Pennycook & Makoni, 2020; Visvanathan, 2009) – that it is important to go beyond learning *about* the global South to learning *from* the South (see Santos, 2014, p. 134). While all these authors convey varied understandings or definitions of the global South, most define it as a wider construct than I do in this book (as low- and lower-middle-income countries; see Section 1.1.1), arguing that it can include the marginalised in the global North who 'have been left out of the grand narrative of modernity' (Pennycook & Makoni, 2020, p. 1).

In one sense, insomuch as this book shares this concern with learning *from* not just *about* the South, it may be seen to be consistent with the perspectives of these authors. Yet I suspect that others may offer a rather different reading of my research – perceiving me as a researcher 'from' the North who attempts to apply a Northern construct (teacher expertise) to contexts in the South in order to identify differences to Northern norms – in this sense, my study may be argued to have never succeeded in escaping the 'Northern gaze'. However, while I invite such scrutiny and recognise my background and prior experiences as important influences on my research practices (see Chapter 5) and personal motivation (see Section 1.1.2), I would emphasise that these are hybrid experiences that are important precisely for this hybridity. The beliefs that underpin my interest in conducting this research and writing this book are influenced by both my Northern background and my extensive experience as a teacher educator in the South, where I perceive my most important learning to have occurred as a result of the opportunities afforded to me to work in multiple national contexts worldwide. Further, the understandings gained from this experience influenced my awareness of the importance of approaching the project sensitively, conducting initial contextualisation research, foregrounding issues of equity, ethicality and participation in research design and data collection. Likewise, data analysis was, as much as possible, conducted inductively and iteratively, with a variety of tools employed to reduce researcher bias and ethnocentrism (e.g., the use of multiple qualitative and quantitative instruments informing single case analysis, the employment of three types of cross-case analysis and multiple levels of fully informed participant validation). I believe that it is this combination of background, awareness and research approach that has enabled me to offer the original findings presented in the preceding chapters.

With this in mind, I would like to argue for a possible alternative starting point for Southern theory. Without attempting to dispute the importance of theory originating in the ideas of Southern authors (Connell, 2007) or the

ways of knowing of Southern communities (Santos, 2014), I propose that useful Southern theory can also emerge from research into Southern practice, providing that such research aims to valorise these practices by evaluating them in their own contexts through appropriate frames of reference and without subordinating them to Northern norms or assumptions of 'best practice' – as I believe my research attempts to do. Further, I would like to suggest that, particularly for those of us who work primarily in realms of social practice (here I identify as a teacher educator rather than a social scientist), there is an urgent, overwhelming imperative for such theory, even if partial and imperfect, in order to counter the regular, often damaging attempts of organisations, individuals and publications to import exogenous (invariably Northern) practices into Southern communities, frequently without any theoretical justification at all (see Tabulawa, 2003). As I have argued in earlier chapters, such attempts are misguided (even if well-intended), presumptuous and frequently result in failure, particularly in the highly complex field of education (e.g., Karavas-Doukas, 1998; Li, 2018; Markee, 1993; Okugawa, 2010; UNICEF, 2015; Warwick et al., 1992). To support this argument for 'practical Southern theory' and its potential contribution, I offer two prior examples, both of which constitute useful evidence of how this can be done in the work of Suresh Canagarajah (1999) in the field of language teaching, and Gautam Bhan (2019) in the field of urban development.

Canagarajah's (1999) book-length study *Resisting Linguistic Imperialism* documents how teachers and learners in war-torn Sri Lanka are able to adopt creative, purposeful strategies to appropriate English as a resource-system to further their own goals without subordinating these or their own identities to the post-colonial linguistic imperialism of global ELT. By adopting a critical pedagogy perspective, he is able to offer useful insights and recommendations for how a holistic pedagogy enables learners to engage and 'negotiate with the agencies of power for personal and collective empowerment' (p. 173). Underpinning his arguments for the need for teachers and learners to appropriate from centre/Northern resource-systems is Canagarajah's notion of periphery thinking, itself a potential source of Southern theory:

> Periphery thinkers may also negotiate fearlessly with other traditions of thinking to borrow useful constructs for their purposes … Adopting a periphery standpoint does not mean that I have to ignore center traditions of thinking and discourse. I can engage with them from my location as a periphery subject. (1999, p. 35)

His emphasis on the need for critical appropriation and borrowing is particularly important in formal systems of education (also see Canagarajah, 2013),

where so much of what are perceived to be acceptable practices, norms and goals within Southern communities derive from Northern models, while contexts in which these practices are expected to be enacted are so different. He notes that 'the corrective is not to eliminate that connection [between ELT and wider social practice] in favour of autonomy or "purity", but to seek a holistic pedagogy that will enable learners to engage with those domains for a richer educational experience' (p. 173).

Bhan's (2019) paper *Notes on a Southern urban practice* opposes attempts to impose Northern urban planning theory uncritically on Southern contexts, instead posing the question (p. 641): 'How can a new body of thought give us ways of moving and modes of practice as well as theoretical formulations?' He argues for the need to build new vocabularies to do this, and reappraises three terms ('squat', 'repair' and 'consolidate') through contextual analysis to reveal their importance as constructs that help us to better understand the practices of city dwellers and organisations in India:

> [These terms] highlight certain modes of existing practice within Indian cities that are under-recognized and under-valued precisely because of their distance from formal sectors and domains of professional practice … Such highlighting – perhaps it is better to think of it as amplification – is an important part of the ethos of Southern inquiry that must seek to constantly make explicit and challenge registers of value and power. (p. 651)

Like Canagarajah, Bhan avoids any appeal to Southern theoretical purity or pre-colonial society, instead emphasising the urgent 'need to act, to move, because the contexts they emerge from demand, require and already exhibit an almost constant movement' (p. 652). He argues for the need 'to generate vocabularies from different positionalities – normative and analytical priorities – as well as multiple geographies' (p. 652). In short, like Canagarajah, he offers a good example of practical Southern theory – theory that is contextually sensitive, appropriate in its understanding of phenomena, avoiding uncritical subordination to Northern norms and valorising potentially useful practices.

11.2 BUILDING THE VOCABULARY OF SOUTHERN PEDAGOGIC THEORY

If Southern theory is to be useful to wider society it needs to be developed to achieve practical goals as soon as possible. Not only is there a need for the grand theories that offer potential ways in which the world can be seen and

evaluated differently, there is also a need for the practical Southern theories, Southern constructs and terminology, as Bhan argues, that enable us to manage daily challenges and problems of practice in every sphere of life, from farming to office work and from birth to death. I here discuss three constructs that are prominent in my research as potential contributions to what might be called Southern pedagogic theory: the first already well established and potentially transformative yet rarely viewed as 'Southern'; the second surprisingly ubiquitous across the global South but often mischaracterised; and the third emerging from the findings of this study – they hold in common a key feature, insomuch as, without (or prior to) appropriate theorisation, the practices involved have all been viewed negatively in the past.

11.2.1 Translanguaging Theory

In its strongest manifestations, translanguaging theory rejects the assumption that named languages (e.g., English, Kiswahili, Farsi) are 'natural' or innate to the human condition, arguing that 'language boundaries are artificial artefacts' (Pennycook & Makoni, 2020, p. 42). Instead, translanguaging theory posits the existence of a single integrated linguistic repertoire from which we draw upon flexibly and appropriately according to interlocuter, context and need (Anderson, 2018b; García, 2009b). Such translingual practices include acts previously described (initially negatively) as code-switching and codemixing (although it typically rejects these terms as rooted in a code-based epistemology) as well as acts of 'multisemiotic, multisensory, and multimodal' communication (Li, 2018, p. 22). As Li (2018) notes, translanguaging is a 'practical theory of language' that 'seems to have captured people's imagination' (p. 9), particularly in the field of education, within which numerous authors have documented its widespread existence and discussed its affordances and uses. While the term originates in the geographical North,[2] it is notable that early translanguaging research frequently involved learners from marginalised periphery communities (e.g., Creese & Blackledge, 2010; García, 2009a, 2010; Li, 2011), which would clearly fall under definitions of the global South offered by many of the writers on Southern theory (e.g., Comaroff & Comaroff, 2012a; Dados & Connell, 2012; Pennycook & Makoni, 2020). Since then, numerous authors have also described it as 'a political stance, a decolonizing stance' (Li, 2021, p. 1; also Flores, 2014), and others (e.g., Canagarajah, 2013; Makalela, 2015), including myself (Anderson & Lightfoot, 2021; Anderson, 2022b) have found

[2] In the work of Cen Williams, a Welsh bilingual educator, who translated it from the Welsh *trawsieithu* (Williams, 1994).

it appropriate to describe Southern social practices. As such, translanguaging constitutes a good example of a Southern epistemology (Heugh, 2015), one that offers an emancipatory, potentially subversive and even radical (insomuch as it crosses or disrupts the abyssal line; Santos, 2014) alternative to accepted, Northern ways of understanding language and describing language learning and use (e.g., Chomsky, 1965). As my research above indicates (also Anderson, 2022b), it not only constitutes an important component of Southern teacher expertise, hitherto neglected in previous expertise studies, but also offers a practical theory for how teachers across the global South can and do cope with highly challenging social and curricular contexts. I believe that the affordances of translanguaging in multilingual contexts across the global South are still to be fully explored, particularly in primary and secondary education, where the vast majority of teachers are by default (or would be if curricular and institutional constraints didn't prevent it) 'translingual teachers'. Such teachers are 'able to understand, interpret, scaffold, and challenge their learners' choice of linguistic resources appropriately [and] to model effective translingual and monolingual practices across the translingual continuum' (Anderson, 2018b, p. 34). In this sense, translanguaging sees, understands and valorises the latent expertise in Southern teachers' *languacognition*.[3]

11.2.2 Elicited Choral Completion

Briefly discussed in Chapter 7, elicited choral completion (ECC) is a pedagogic practice described from a number of locations across the (geopolitical) global South, yet, in my experience, it is uncommon in Northern classrooms. Typically described somewhat derogatively as 'oral cloze' in South East Asia (Martin, 1996), 'safe talk' in South Africa (Chick, 1996) and as part of the 'teachering device' in South Asia (Sarangapani, 2003), ECC occurs during teacher-led lesson phases and involves the teacher using rising intonation at the end of a sentence to encourage learners to complete it, often with a key term or answer as the element students are expected to add. I observed it on a number of occasions among several of the expert teachers in my study (see Extracts 7.8 and 7.16), and frequently across a range of contexts in South Asia (India and Bangladesh) and Sub-Saharan Africa (Eritrea, Kenya, Malawi, Rwanda; also see Kuchah, 2019).

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[3] I use this term to suggest that the constructs of language and cognition constitute a fundamentally inseparable whole, but not necessarily the teleological 'language-influences-cognition' relationship of the Sapir-Whorf hypothesis; the two develop together, both phylogenetically and ontogenetically.

Apparently unaware of its widespread prevalence across the global South, Chick (1996) proposes that it originates in Zulu-English interactional styles specific to post-Apartheid Africa. He claims that it is rarely used to check or elicit learner understanding (although his description of its use and his data do not necessarily support this claim); instead, he argues that it serves an important social function, giving 'the students opportunities to participate in ways that reduce the possibility of the loss of face [including for the teacher] associated with providing incorrect responses to teacher elicitations' (p. 29), also noting that it 'contributes to the perception that purposeful activity and learning are taking place' (p. 30). My personal experience of elicited choral completion indicates that there seem to be several types of ECC, ranging clinally in their functions, all incorporating pedagogic and social roles simultaneously – both of which are important to purposeful learning and invariably interconnected (see Section 7.1 on the importance of confidence building in expert teachers' classrooms). While it is not exclusive to additional language (e.g., English/EMI) classrooms (see Sarangapani, 2003), in such classrooms (including Chick's), even when the word or phrase being elicited has just been provided by the teacher, it is *never* without pedagogic purpose. For example, it always serves as an interactive drill of sorts, providing learners with an opportunity to pronounce a key phrase, while also potentially reinforcing memory retention of it (Ellis, 1996). In Extract 7.16, Dipika uses ECC in what Dakin would call a meaningful 'general knowledge drill' (1973), and in the wider discourse of her lesson, it also enables her to check learners' background knowledge during the introduction of a complex text. Raju uses it in Extract 7.8 to ask a question while reviewing a previous lesson – ECC enables him to simplify a complex question form appropriately to the learners' proficiency levels in English. ECC may be more prevalent across the global South due to the complex challenges learners and teachers face with conveying meaning and facilitating learning in the face of overambitious curricula content and low levels of additional language (often English) literacy and oracy. However, without detailed investigation and non-judgemental assessment independent of Northern norms (none of the above authors offer this), its origins, prevalence and functions are likely to be misunderstood. In this sense, ECC requires further investigation as a construct to describe a Southern phenomenon within classroom discourse.

11.2.3 Text Interpretation

Discussed in Sections 7.5.3 and 9.11, I use the term 'text interpretation' as an alternative to the often ambiguous and cursory references to the 'translation method' (Rajkhowa & Das, 2015), the 'bilingual method' (Chattopadhyay, 2020),

or 'teaching-in-translation' (Bhattacharya, 2013) in the literature on English teaching in India, where it is common. While there is much derogatory reference to such practices, often associated with 'traditional' or 'outdated' approaches, there are very few attempts in the literature on language teaching to investigate and theorise text interpretation with the necessary context-sensitivity and attempts at valorisation appropriate for developing practical Southern theory.[4] Its prevalence in India, particularly in English language and EMI lessons, is likely to result from a particular combination of challenges that teachers and learners face – highly ambitious curricula (true across much of the South; Pritchett & Beatty, 2012; World Bank, 2019b) and the (likely post-colonial) expectation that English teachers working at secondary grades in India teach English language and literature combined, even though many learners are often still struggling with basic literacy (Anderson, 2020c; ASER, 2017, 2018) in what is their second, third or even fourth written script.

In the absence of careful theorisation, no pedagogic guidance has developed around text interpretation and it has remained a 'hidden pedagogy' in Indian classrooms for decades (Anderson, 2020c). However, my research has indicated, albeit tentatively, that more and less effective ways of conducting text interpretation exist and that these are, unsurprisingly, dependent on learners' levels of proficiency and literacy in English (see Table 9.12). Even in the most disadvantaged contexts, where text complexity was usually well beyond learners' independent reading ability, the text interpretation of the expert teachers in my study involved a number of important differences to those of their peers, and while the pathway for text interpretation proposed in Table 9.12 may constitute potentially useful pedagogic support, it is only an initial step as a potential basis for further research into, and theorising of, text interpretation as a Southern pedagogic practice.

11.3 A FRAMEWORK FOR BUILDING THE EVIDENCE BASE OF CONTEXT-SPECIFIC TEACHER EXPERTISE

This second part of the chapter offers one potential vision for how educational communities in different contexts worldwide can engage in collaborative inquiry as part of a sustainable framework for teacher professional development. Such a framework would enable communities, through

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[4] Although see Smith and Imura (2004) for a historically informed and carefully theorised discussion of a comparable approach, the *hensoku/yakudou* tradition in Japan; and Probyn (2019) for evidence of similar practices in South Africa.

research, to build endogenous understandings of context-specific expertise as evidence-based, appropriate, good practice that is not dependent on exogenous interventions. Expertise studies, like the one documented in this book, are seen as part of this vision.

Models of appropriate/effective teacher professional development (PD) have changed significantly since the turn of the twenty-first century. Previously, PD activities tended to involve one-off workshops, short courses and seminars, with a primary focus on techniques, ideas and materials, with these typically being selected by senior staff and/or teacher educators (Borko et al., 2010). More recently, a wider range of formats for interaction and development have emerged, consistent with the recognition for teacher development to be oriented primarily around the teacher's own classroom and context, with the recognition that teachers' interests and needs vary greatly and can take priority over systemic and/or institutional needs (Borko et al., 2010; Leu & Price-Rom, 2006). In this sense, teacher development has become more participant-centred, more collaborative and less top-down, also incorporating elements of reflection and individualised support or mentoring, consistent with Fullan and Hargreaves' (2016) notion of professional learning and development, and Darling-Hammond et al.'s (2017) recommendations. These models have emerged primarily in Northern contexts, particularly North America, and, as such, interact with and draw extensively on much of what is known to constitute pedagogic 'best practices' (Darling-Hammond et al., 2017, p. v) or 'good new pedagogies' (Fullan & Hargreaves, 2016, p. 16) in such contexts. As I have argued repeatedly throughout this book, and demonstrated through my research, the findings underpinning these recommendations cannot be assumed to hold true across all pedagogic contexts, particularly when moving from high-income, privileged systems to the lower-income, more challenging, low resource systems of the global South (also see Anderson et al., 2021; Holliday, 1994; Kuchah, 2018).

This lack of evidence base on appropriate good practice in so many contexts worldwide creates a dilemma for key stakeholders in teacher education: whether to attempt to import exogenous notions of good practice from other contexts, whether to seek to develop these endogenously or whether to combine these. Below I present a framework (Figure 11.1) oriented primarily around endogenous research and evidence building, yet which also includes the possibility for exogenous practices of interest to be investigated and critically evaluated. The framework prioritises collaborative, inquiry-oriented PD for several important reasons: firstly, due to the need for educational communities to build understandings of what works in their context; secondly,

Figure 11.1 A research framework for developing context-specific teacher expertise
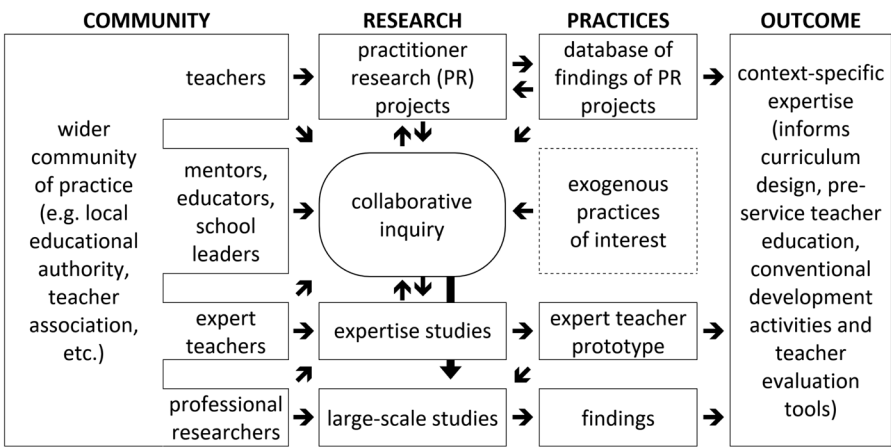
because such inquiry is empowering for experienced practitioners, who, in so many contexts around the world, have been treated as technicians rather than professionals, expected to implement policy, rather than to help develop it; thirdly, because, through its existence, it can offer a useful structuring device for PD that is often lacking, particularly in low-income contexts worldwide (e.g., Pryor et al., 2012). Nonetheless, I do not necessarily seek to suggest that all PD should be inquiry-oriented. Particularly in the early stages of our careers, many of us can and do benefit from the more practically oriented dissemination of ideas, tools and skills through workshops, conferences, webinars and courses that directly and immediately benefit classroom practice. The framework acknowledges this in its outcome – such dissemination can only occur when more is known about the tools and skills in question (i.e., which ones are useful).

Some terms require initial clarification. Firstly, 'context-specific expertise', as the outcome of the framework, refers to expertise that is distributed throughout the community, not solely among researchers, teachers or school leaders, but as a developing understanding concerning effective pedagogy and school management that all share (admittedly in varying degrees) and contribute towards by collaborating on projects that learn from and build on prior inquiry – in this sense, it may be different to expert teacher 'expertise', which may be much more idiosyncratic and context-specific. Secondly, 'collaborative inquiry' refers to the involvement of those directly engaged in delivering education in opportunities to learn about education in ways that are both relevant to them and potentially useful for sharing with others; in

this sense, those with specialist research knowledge offer the technical input, rather than controlling the research agenda in a top-down fashion, as so often happens around the world. Collaborative inquiry constitutes the central modality for a range of research types that involve teachers, expert teachers, educators and professional researchers in varying combinations, and may be networked and supported through local pedagogical/teacher resource centres, commonly found in many countries, including in the global South (see Giordano, 2008). Finally, because inquiry is primarily oriented around the practitioner, 'practices' (third column) constitute the primary focus and product (as 'findings') of research.

The top row of the framework presents perhaps the most important research activity; practitioner research projects, led by teachers and supported by mentors or educators, potentially as part of either in-service or preservice teacher education (the latter, for example, already happens in some countries, such as Bangladesh; Haque et al., 2019). The emphasis in this practitioner research is teacher learning through supported inquiry and reflection (see Anderson, 2020b), rather than on producing robust, transferable research findings, although this is also a useful secondary output (discussed below). 'Practitioner research' as used here includes a number of approaches, which have demonstrated success in different contexts worldwide. This includes models of action research oriented to the needs of teachers, such as Exploratory action research (e.g., Smith & Rebolledo, 2018; see separate callout), Exploratory practice (e.g., Hanks, 2017) and Collaborative action research (e.g., Riel, 2019) as well as less formalised modes of collaborative inquiry, such as Lesson study (e.g., Dudley, 2014) and inquiry led by school leaders to encourage institution-wide learning, such as Instructional rounds (e.g., City, 2011). Most of these approaches prioritise research questions emerging from practitioners' own challenges, puzzles and perceived successes in their day-to-day practice. However, there is also scope for investigating the usefulness of exogenous practices, both from comparable contexts (e.g., South-South transfer) or very different ones, providing that such practices undergo critical evaluation through the collaborative inquiry recommended. Importantly, practitioners engaging in any of these types of inquiry would be encouraged to produce brief, teacher-friendly reports that would be uploaded to a freely accessible database that itself would constitute a useful first-step evidence base that contributes to the intended outcome (of context-specific expertise), and also offers potential 'hypothesis generating' studies for 'hypothesis testing' (Gerring's terms; 2007) through larger-scale research activities (discussed below).

Exploratory Action Research: Practitioner Inquiry from the Global South

Developed by Richard Smith, Paula Rebolledo and colleagues initially in Chile (see, e.g., Smith, 2015; Smith & Rebolledo, 2018), the exploratory action research model involves a modified, double-loop version of the teacher action research cycle, with contextual exploration constituting the first loop before an intervention takes place, thereby enabling teachers to understand more of their context, modify an intervention responsively, and compare post-intervention findings with initial exploration findings for additional insight. Participants also typically engage in collaborative sharing activities at conferences or symposia upon completion of action research projects, and often subsequently move into the role of mentor for other teachers conducting action research, thereby building mentoring expertise through the process. Exploratory action research has since been used in a wide range of contexts across the global South, including Chile, China, India, Mexico, Nepal, Peru and Sierra Leone. Evidence of impact suggests that teachers develop sustainable means to solve real classroom issues, feel more in control of their situations as empowered practitioners, and improve relationships with learners (e.g., Rebolledo et al., 2016; Smith & Rebolledo, n.d.). Several useful publications, freely available online, exist to help both practitioners (e.g., Smith & Rebolledo, 2018) and mentors (Smith, 2020).

A second type of research activity within the framework is teacher expertise studies. As I have demonstrated in this book, and others before me (e.g., Smith & Strahan, 2004; Tsui, 2003; Yang, 2014), these can constitute an additional source of evidence for appropriate good practice oriented around the individual practitioner, and aiming to understand the nature, cognition, practices and development of expert teachers within a specific context. As I have also demonstrated, such studies can be at least partially participatory (Anderson, 2022a), involving the expert practitioners in addressing key questions concerning what aspects of expertise are studied and how. Importantly, expertise studies bring professional researchers into the collaborative inquiry forum; the expertise and time of such researchers is valued and drawn upon to conduct larger-scale, more rigorously designed research than would normally be possible for the majority of working teachers. As argued in Chapter 10, the findings of such studies can help build context-specific expert teacher prototypes, which themselves may contribute directly to the envisaged outcome

(as concrete exemplars), and also indirectly, by offering further 'hypothesis generating' stimuli for larger-scale studies.

The second way in which professional researchers may be involved in the framework is by conducting large-scale studies, which themselves would originate in other research practices within the model (i.e., practitioner research and expertise studies). Several types of large-scale study are envisaged,[5] including:

- Systematic reviews of prior research conducted in the context in question, particularly practitioner research projects, which are likely to be numerous and therefore lend themselves to research using approaches such as metasynthesis and metasummary (see, e.g., Thorne et al., 2004). By bringing together the findings of large numbers of practitioner research projects, these systematic reviews can offer more reliable findings than individual studies would; stratified analysis can also enable finer resolution localisation for specific findings (e.g., whether a specific positive finding of practitioner research projects is common to both private and public schools, or localised to just one of these).

- Large-scale, experimental studies (e.g., randomised controlled trials and quasi-experimental designs) for which research hypotheses are generated from the findings of either practitioner research projects or expertise studies. This ensures that these studies originate in relevant issues of practice to teachers, and are informed directly by their expertise, rather than the often poorly informed and misdirected hypotheses pursued in studies conducted by researcher-led bodies such as the Education Endowment Foundation of the UK (see Anderson, 2018a; Old, 2018) or the Center for Global Development (see Bold et al., 2013).

- Longitudinal studies that investigate developmental research questions, such as teacher career stages (see Day et al., 2007), the development of teacher expertise and the impact and sustainability of specific interventions.

Large-scale studies contribute directly useful evidence to the primary outcome of context-specific expertise because they originate in the collaborative inquiry of smaller scale projects, thereby retaining relevance to practitioners' needs. As such, professional researchers involved in the framework do not dictate the research agenda – they work in service of the greater whole as part

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[5] This list is indicative only.

of the mainstream education community. Through consultation workshops it may also be possible for this community to contribute to prioritising specific research agendas and questions (see, e.g., Chalmers et al., 2021). Research reports produced by these researchers are also written in teacher-friendly, accessible language to offer useful implications for practice. In this sense, all research within the framework involves research on 'practice', and is relevant to teaching because it is always conducted with data from real classrooms (with high ecological validity) and involves questions of relevance and importance to effective teaching. In national contexts where budgets for educational research may be limited, this is a key advantage of the framework.

When combined, the above elements constitute a means for an educational community to develop its own knowledge base of appropriate, good, localised practices (i.e., context-specific expertise) while also contributing usefully to wider teacher development goals. The framework ensures that the community is not dependent on exogenous practices and, indeed, develops the resources and skills to critically evaluate and, if useful, appropriate from such exogenous practices. NGOs and development partners seeking to support teacher education within the community would be required to do so within the model framework (e.g., providing financial resources to support practitioner research projects, fund teacher expertise studies or support the curation of the database of findings). Any exogenous practices that such organisations offer to the community are first evaluated through critical collaborative inquiry.

This discussion of the framework should conclude with an important acknowledgement: While it draws upon numerous well-known and established research and professional development practices, all of which sometimes do interact with each other in useful ways in different systems of research and teacher development around the world, the framework is presented here as entirely hypothetical and does not yet (to my knowledge) exist anywhere in its entirety.

11.4 CONCLUSION

This chapter has sought to address wider questions emerging from this study of teacher expertise in the global South. It has explored the notion of Southern theory and argued for the need for practical Southern theory to support and inform current practice in the applied social sciences, such as education. It has presented two studies that, I argue, offer examples of such

practical Southern theory. I have also offered descriptions of three example phenomena found to be important in my own research that may be seen to make useful contributions to Southern pedagogic theory.

The chapter has also presented a hypothetical model for building an evidence-based, context-specific vision of teacher expertise that incorporates teacher expertise studies alongside other endeavours that seek to prioritise teachers' interests and needs over academic research agendas through collaborative inquiry. I believe the model is feasible even in particularly low-income national contexts, offers useful and sustainable professional development activities for teachers and is capable of informing key areas of the wider education system that engage with issues of teacher and teaching quality (e.g., curriculum design, preservice and in-service teacher education and teacher quality assurance). Contrary to some researchers of teacher expertise (e.g., Stigler & Miller, 2018), I believe that expert teachers can emerge and develop largely in isolation (my research supports this), yet I also agree that appropriate collaboration, interaction and support are crucial to the effectiveness of any wider educational system. As Fullan and Hargreaves (2016, p. 18) observe, 'strong cultures of collaborative professionalism are like strong teams. They thrive on diversity and disagreement, promote good variation of style, strengths, and overall approach, and increase individual as well as collective talent.'

12 Concluding Reflections

Those personal qualities that we hold dear – resilience and courage in the face of stress, a sense of craft in our work, a commitment to justice and caring in our social relationships, a dedication to advancing the public good in our communal life – are exceedingly difficult to assess. And so, unfortunately, we are apt to measure what we can, and eventually come to value what is measured over what is left unmeasured. The shift is subtle, and occurs gradually. It first invades our language and then slowly begins to dominate our thinking. It is all around us, and we too are a part of it. In neither academic nor popular discourse about schools does one find nowadays much reference to the important human qualities noted above. The language of academic achievement tests has become the primary rhetoric of schooling.

(Alexander et al., 1987, pp. 51–52)

In this book I believe I have substantiated two claims: that there are many capable teachers working in the global South and that there is a great deal that can be learnt from them – I hope that readers have learnt as much as I have from the original findings discussed above. I have also pointed out that, to date, no researchers, policy initiatives or, to my knowledge, interventions aiming to improve teaching quality in the South have recognised these important facts. By studying such teachers, understanding what they do and why they do it, we can uncover numerous insights of value into how expert teachers are able to continue to facilitate learning and development in contexts that are challenging. Indeed, these teachers do not simply cope 'despite' these challenges. On the contrary, because their practices evolved in these circumstances, the challenges themselves constitute norms of practice, and

the practices in question are not so much ways of coping, but operate in equilibrium with them. Inappropriate exams, overambitious curricula and low learner self-esteem (to name just a few) are all norms that have shaped how Dipika, Gajanan, Kuheli, Manjusha, Nurjahan, Raju, Shekhar, Vinay and Matiewas Ghebrechristos (in Chapter 1) teach. As a consequence, to be effective, these teachers need none of the changes that are typically seen as prerequisites for teaching quality to improve in low-income contexts. They manage excessive workloads, momentary changes to timetables, irregular lesson lengths and student absenteeism *through* their expertise. Note, however, that by making this point, I do not wish to suggest that educational authorities should stop seeing these challenges as challenges, nor to echo the potentially dangerous arguments that, for example, very large classes may, in fact, be opportunities rather than challenges (e.g., Hess, 2001), or that workloads that far exceed internationally agreed norms are, in some way, acceptable. They are not. All experienced educators know that if you cannot even remember the names of all your learners, your ability to provide for their needs as well as you would like to is compromised, and attempts to do so may lead to exhaustion, and eventually burnout. All teachers deserve stable, humane and manageable working conditions. Yet, in the multiple, diverse attempts to move towards such conditions in the global South – changes that Southern states are often effecting far more rapidly than their Northern counterparts did (see Clemens, 2004) – it is expert Southern teachers who, in the meantime, are capable of providing their less experienced, or less capable peers with models of good practice that are appropriate, feasible and sustainable in comparable contexts – and this is the key value of studying expert teachers anywhere.

Precisely because they embrace the sprawling, fuzzy core of teacher quality, teacher expertise studies provide opportunities for those of us who work in educational research to measure what we value most among teachers, rather than being forced to value what we can measure. As I argued in Chapter 1, the triumph of the latter over the former (see epigraph from Alexander et al., 1987, above) has so blighted attempts at international development in education that the very contexts in which all of us have been socialised into society – classrooms – are frequently characterised as 'black boxes' rather than as the familiar domains of our childhood experience (see Alexander, 2015). Such acts of methodological violence towards human experience cannot be allowed to continue to dominate the 'evidence base' on 'what works' in education simply because it is these studies that dare to generalise most about good practice. For this reason, it is imperative that future quantitative research designs adopt multidimensional constructs of teacher quality,

with the accompanying use of multiple outcome measures wherever possible (see Kunter et al., 2013a, for detailed discussion of how this was done in the COACTIV project).

I believe I have demonstrated in this book how even small-scale, qualitative studies, if carefully conducted and cautiously extrapolated from, can contribute meaningfully to our understandings of what may work in classrooms in a given context; how the 'multiple realities' often aspired towards in qualitative research (e.g., Rimpiläinen, 2015) actually constitute varying experiences of the same reality – experiences that invariably have something in common that we can learn from alongside the importance of the particular that such studies document so well. In this sense, both sides of the paradigm 'dichotomy' (see Section 1.4) in research on international development lose out from neglecting the insights that the other side can offer. I would argue that this loss is a key causal influence on the stark fact that, as Alexander (2015), Muralidharan (2017), and Pryor et al. (2012) note – from both sides of this divide – we know almost nothing about good pedagogic practice in contexts that are challenging. As a result, we are left impoverished in our attempts to support and improve education where improvements are needed most.

As I have demonstrated in this book, the almost complete lack of expertise research in the global South exposes the very real need for future studies in diverse contexts. Because of the evidence of the context-specificness of some aspects of teacher expertise, such studies will facilitate critical examination of the extent to which a given expertise prototype does indeed apply to new contexts – or whether further variable parameters exist and require elucidation and description. Through my attempts to discuss critically and transparently the methodological challenges experienced when conducting expertise research in the South, I hope I have provided useful inspiration and potential guidance for others to conduct their own studies – not only is such research sorely needed from a purely technical perspective, it is also important from a social justice perspective. Of the tens of millions of teachers working in the global South, those who are doing their jobs effectively deserve the recognition that such research can offer, and their peers also deserve the support that learning from them can provide.

At a number of points in this book, I have argued that until we understand the practices of expert teachers in diverse contexts, we cannot claim to understand teacher expertise itself. In this sense, there is a need to understand not only that which seems to remain true irrespective of context but also that which varies due to meta-contextual factors (such as the investment

disparities between educational systems in the North and the South), that which seems to apply only to a specific national context and that which may only apply in a specific subject or at a specific level. If we, as educational researchers, are able to do this, we can succeed in fleshing out the differentiated framework proposed in draft form in Chapter 10. While this feat can be achieved cumulatively through diverse studies in different contexts, followed by metareviews and metasummaries, if it were approached systematically, through both national and international networks of researchers, it would likely be achieved more quickly and more effectively. This may seem like an ambitious aim, yet it is one that focuses on what I would argue is one of the most valuable and useful goals of research in education today: understanding what it *really* means to be an expert teacher.

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INDEX

Teacher Expertise in the Global South

Theory, Research and Evidence

'Drawing skilfully on fieldwork, Jason Anderson takes us into classrooms in low-resource contexts, where he identifies high quality educational practices that speak of expertise. This deeply thoughtful, contextually-sensitive volume provides a very useful framework for understanding teacher expertise and should be of great interest to policy-makers, educational administrators, researchers and teacher educators.'

Mark Wyatt, Khalifa University

There are many expert teachers working in the global South and we can learn a great deal from them. Neither of these claims should be surprising, yet to date, there has been almost no research conducted on expert teachers working in Southern contexts. Instead, the huge sums of money invested in attempting to improve teacher quality in the South have frequently been directed towards introducing exogenous practices or interventions that may be culturally inappropriate, practically infeasible and ultimately unsustainable – often failing as a result. In this pioneering book, Jason Anderson provides an authoritative overview of the practices, cognition and professionalism of expert teachers working in low-income contexts. By drawing upon both systematic reviews of teacher expertise and effectiveness research, and his own fieldwork in India, he argues that without an understanding of expert teachers working in all contexts worldwide, we cannot truly understand expertise itself.

The book:

- Includes detailed, contextualized descriptions of the practices, knowledge and professionalism of expert teachers working in the global South
- Provides a step-by-step guide to conducting ethical and equitable research in education in the global South
- Offers a framework within which teacher expertise research, alongside other forms of collaborative inquiry, can contribute to the building of sustainable, context-specific understandings of effective teaching in any context

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