

Literature review on meritocratic perceptions of public education and diverse learning opportunities

Please note, this is a correction of the original literature review that was included in the report, Central Student Interest Programs: Implementation Update [4541], in the [Agenda](#) for the Planning and Priorities Committee, on May 17, 2023, as one of 14 appendices (see Appendix M). Every effort has been made to correct all citations and references.

TITLE: Literature review on meritocratic perceptions of public education and diverse learning opportunities (Revised May 2024)

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Executive Summary

A society based only on individual merit assumes all groups and persons have equal access to resources and opportunities. All societies have or integrate merit-based ideologies to varying degrees. Meritocratic ideologies support dual narratives within societies. They support the equality of all people and, most importantly, their right to achieve success through effort (e.g., Batruch et al., 2019). At the same time, the beliefs within meritocratic ideologies can help to justify existing stratification or differences of economic, health, and educational outcomes based on individual behaviour or performance (Au, 2016). Within this conception, merit is rewarded, and demonstration of abilities creates conditions in which effort (what you do) and merit (what you achieve) are connected (Batruch et. al, 2019).

Beliefs around meritocracy in education can serve to ignore the ongoing role that structures, or society, play in student success. Discrimination, bias, or lack of opportunity in shaping individual performance are often not taken into consideration as reasons for disproportionate outcomes of groups of people. Individual performance, an essential factor for student success in classrooms, can also become the primary justification for future learning opportunities offered to students as a result of student performance (e.g., an application process).

While merit-based opportunities become the reality for almost all students later into secondary school and during the transition to post-secondary school in almost all jurisdictions, differentiated opportunities based on merit can also frequently occur in a variety of public education situations much earlier in a student's schooling trajectory, e.g., school choice, Gifted programs, specialized school opportunities. In these instances, family economic and social capital can have major influences on students' demonstrated skill levels, based on the kind of opportunities that students receive outside of their public education experience that allowed for these skills to develop. Here, meritocracy can function to legitimize and maintain existing inequities as functions of individual behaviour. On a societal scale, disparities in income, health, and education outcome can all be rationalized as products of individual behaviour within meritocratic beliefs (Owens & de St Croix, 2020).

Meritocratic beliefs are flexibly applied within other conceptions of public education and exist in almost all public education systems to some degree. They are often integrated within other ideas of the role of public education within society and have different implications depending on the application of merit-based thinking with the larger education system. For example, many jurisdictions use standardized assessments to stream students based on their performance into different education opportunities that offer additional education and career trajectories (as an example see, Jin & Ball, 2020).

Key to merit-based educational policies is the ways that success is defined. Counter to culturally responsive versions of academic success in which teachers and schools work with students' families and communities to develop culturally sensitive forms of academic achievement and general schooling success, merit-based approaches to student success often have strict definitions of success that are applied to schools and students. What is valued or 'counts' as success is likely a reproduction or a representation of the dominant culture or ethnicity's values within a given society. As a result, these values, skills, and forms of knowledge that define jurisdictional merit are more readily available or easily demonstrable by students from the dominant economic, social, and cultural group.

In Ontario and across Canada, merit-based ideas have existed uncomfortably with notions of the value of multiculturalism, beliefs that diversity is a societal asset, and that public education can interrupt systemic discrimination issues. Beliefs about diversity and multiculturalism are not represented within the existing infrastructure and resources within the urban schools in Toronto (Toronto District School Board, 2017). Learning opportunities within public education for economically well-resourced families differ from opportunities for students experiencing more economic scarcity. Students from higher socioeconomic (SES) neighborhoods have greater representation in popular elementary school programs such as French Immersion or the special education identification of Giftedness.

At an overall system level, the data shows that Toronto District School Board (TDSB) French Immersion programming has a consistently greater percentage of students from high income households (as an example see, Toronto District School Board, 2024). In Ontario, education system excellence has historically been defined by the overall academic achievement of all students and the success experienced by the most historically marginalized populations of students (as an example, see Ontario, 2014). Understanding how merit-based beliefs, while essential for individual success in education, can also interrupt the flow of opportunities and resources to areas of the education system that have historically suffered the most from scarcity of educational opportunities, is critical in reaching system excellence.

Introduction to Meritocracy

The term Meritocracy first appeared in a 1958 satire, *The Rise of the Meritocracy*, and is often associated with ideas in which personal merit or skill and related opportunities of success are directly related or connected, e.g., merit/skill results in opportunities (Jin & Ball, 2020). Jin & Ball (2020) state:

Meritocracy is an ideology of social justice that is based on the notion of equality of opportunity. It assumes that social justice can be achieved as long as everyone has an equal opportunity to compete for social resources on the basis of merit, rather than by inheritance or wealth (Jin & Ball, 2020, p. 1).

Amongst many, Darnon et al. (2018) argue that the idea is integrated within public education systems as a means through which social inequities can shift. Seen in this light, education then becomes a means through which existing social and economic order can change based on skills, merit, and hard work (Darnon et al., 2018). This idea represents a very important set of beliefs for public education systems as it provides a central or primary purpose for public education to offer opportunities for career and life chance. As such, it exists in a myriad of ways within almost all publicly funded education systems (Jin & Ball, 2020).

The assumption often implicit in the use of meritocratic thinking within public education is that everyone has equal access to opportunities—that everyone has an equal chance (Darnon et al., 2018). Belief in the universality of ‘equal chances’ within notions of meritocracy underpins a key operating principle within schools, the importance of effort and subsequent merit, or skill. However, this belief can also serve to inhibit opportunities for students. Reasons used to explain existing disparities in student outcomes within meritocratic beliefs rely heavily on the individual student—their effort and their skill, with limited or no consideration for the significant influences that existing inequities embedded within society have on these same disparities in student achievement (as an example see, Darnon et al., 2018; Mijs, 2016; Wayne & Cabral, 2021). In so doing, public education systems de-emphasize their role in disrupting existing inequities within the larger social order (Batruch et al., 2019). This serves to reinforce or

perpetuate existing inequities, rationalized as products of individual performance and behavior (Jin & Ball, 2020).

In parallel to the justification of student outcome disparities on individual performance, a society based on merit assumes equality of access to resources/opportunities for all groups and persons and justifies the stratification of economic, health, and educational attainment or outcome on individual behaviour or performance rather than structural or societal inequities beyond peoples' behaviours or performance (Batruch et al., 2019).

Batruch et al. (2019) associate meritocratic beliefs with a functionalist viewpoint. Here, they connect the purpose of these belief systems to the justification of the inequitable distribution of resources and income in society, as distribution, within meritocratic ideals, is largely determined by merit and effort (Batruch et al., 2019). However, research in areas of social psychology have shown how the application of merit-based beliefs can exasperate inequities in society. As an example, McCoy & Major (2007) found that when people are asked to think about the concept of meritocracy, they are more likely to attribute social inequalities as a personal or individual quality—a deserved outcome of individual performance. Beliefs that centre individual merit often ignore the ongoing role that structures in society have on an individuals' success and outcome. Ongoing societal and institutional racism, discrimination, bias, or lack of opportunity--for certain groups of people or communities—all influence disparities in success and outcome (Ladson-Billings, 2021).

As important as meritocratic ideas are in substantiating the hard work of students and educators in learning experiences, evident in all large education systems, beliefs embedded within meritocracy are also used to legitimize and maintain existing inequalities. These beliefs do this by justifying or legitimizing education and societal inequalities as products of individual performance(s) and thus deserved. This justification, in turn, may create barriers to organizational practices that are intended to provide key opportunities to people who have been historically disadvantaged (e.g., TDSB's Employment Equity Strategy, or affirmative action

in general). Since everyone has an equal chance, these interventions are then challenged on grounds of being unfair or undeserved.

The concept of equity has long been featured in educational policies as a means of fostering equity in society. The Organisation for Economic Cooperation and Development (OECD) identifies education as one of the most powerful levers available to make society more equitable (OECD, 2012). However, for education to foster equity in society, education systems themselves need to be equitable. The OECD recognizes that achieving equity in and through education has remained an ongoing, difficult societal problem despite serious policy efforts (OECD, 2015). Equity within merit-based perspectives just discussed assumes that everyone has an equal opportunity, that there is a sameness of treatment and opportunity within peoples' experience both in education as well in society in general. It is often associated with market-oriented ways of thinking that foster ideals of fairness and equal opportunity.

Market-based policies like parental choice, school vouchers, and school competition are at times associated with promoting equity by raising system-wide excellence of service while attending to the diverse needs of individual families through selection and choice in the 'education market'. But this perspective also relies on assumptions about parents and communities' ability to access and/or navigate public education systems regardless of the social and economic capital (income, education, immigration status, etc.) of the parents or the communities (Smith et al., 2016).

Almost all educational jurisdictions rely on some form of merit-based ideas in providing public education. The degrees to which principles of merit are embedded within any policy or practice within education opportunity and outcome depends on many factors associated with a jurisdiction's approach to governing. This makes jurisdictional comparisons around the use of educational merit within educational policy challenging. However, exploring some examples of merit-based approaches is helpful in understanding how merit-based beliefs are interwoven within other conceptions of social mobility, equity, and the role of education within society. The

forthcoming sections discuss educational equity in relation to meritocracy and the ways in which specific jurisdictions have used merit-based ideas within education policy and practice.

Adaptation of Meritocratic Ideals in Public Education

New York City (NYC)

New York City (NYC) currently draws on merit-based ideas in the city's persistent use of standardized testing to define educational success and screen students across a number of different secondary school application processes (Zimmer & Shen-Berro, 2023). Within a larger screening process across all admissions for high school, NYC uses a standardized test, the Secondary High School Admissions Test (SHSAT), and as a means through which to admit students into nine elite specialized high schools, with the exception of one, which holds an audition and review of academic record (NYC Public Schools, 2024).

In following over 700,000 grade 8 students applying to these schools from 2004-2013, Corcoran & Baker-Smith (2018) found significant disparities between the demographics of all NYC eighth graders applying to these programs and the students who gained admission. Admissions to these schools is extremely popular with about a third (25,000) of all students in grade 8 applying to these programs and only 6% of applicants receiving admissions (Corcoran & Baker-Smith, 2018). Students from racialized communities, excluding East Asian students, and students from lower-income families were significantly underrepresented in all nine specialized schools (Corcoran & Baker-Smith, 2018). The NYC admissions process for these specialized schools has been publicly contentious for decades. The debate is situated between a variety of ideas around equity of opportunity, diversity, and what constitutes merit (Mazie, 2009). Skill and merit, who demonstrates skill, and deserves these opportunities are uncertain and politically contested. Using such a narrow, standardized approach to admission decisions and justification of these opportunities exasperates this uncertainty (e.g., Zimmer & Shen-Berro, 2023).

Au's (2016) discussion of Neoliberalism, Race, and Meritocracy is helpful in unpacking some ideas of both meritocracy and structural inequalities that are both at play within the NYC's use of standardized tests to legitimize offering different learning opportunities to students within their parent and student choice models. While on the one hand, students objectively perform at different levels on NYC's Standardized High School Admissions Test (SHSAT) and thus, at face value, can be seen to have had an equal chance at admissions to these program opportunities, the outcome disparities that are annually expressed in this admissions test suggests significant structural inequities that fall across both racial and income lines and point to an inequitable approach to secondary school admissions within the NYC process (Au, 2016; Corcoran & Baker-Smith, 2018). Au (2016) describes the question that is at play within merit-based admission policies, which drive many school choice options in US jurisdictions, in the following way, "... the empirical question becomes whether or not high-stakes, standardized testing, as the fulcrum on which free-market education policy mechanisms pivot, ameliorates educational inequality experienced by children of color in the United States, or exacerbates racialized inequalities" (Au, 2016, p. 42).

Singapore

Singapore is an extremely high performing jurisdiction in all international assessments (e.g., Programme for International Student Assessment (PISA)) (e.g., OECD, 2023; Ang, 2020). The public education system in Singapore uses a variety of student outcome methods in order to stream students into different performance pathways and cultivate talent based on student outcome (as an example see, Ministry of Education, Singapore, n.d.).

Singapore's public education system relies on conceptions of meritocracy to justify disparities in economic and educational resources and opportunities. Currently and historically, Singapore is challenged with significant disparities in income and opportunity amongst the three predominant cultural-ethnic groups within Singapore: Chinese, South Asians, and Malaysians (e.g., Lim & Tan, 2018; Koh, 2014). The educational system within Singapore attempts to cultivate an elite group of people through notions of merit, effort, and achievement (Tan, 2017).

Cultivating a small population of high-performing students to serve as an elite group of leaders within society broadens the purposes of meritocracy within the education system from discussions of equal chances to access merit-based opportunities to include educational meritocracy as a means, or a lever to access elite talent and leadership amongst the wider population (Tan, 2017). While meritocracy is clearly an important concept within educational policy in Singapore, there are significant disparities in education outcomes that are associated to with both ethnicity and income amongst Singapore's population that challenge the degrees in which effort and merit alone are the key factors in explaining differences in student outcome. Structural inequalities within the Singaporean society also may play a significant contributing role in explaining these disparities (Bradley & Corwyn, 2002; OECD, 2015; Sirin, 2005).

United Kingdom (UK)

Meritocracy has been an important lever in English educational policy for over 40 years (Owens & de St Croix, 2020). From more conservative coalitions, the pursuit of meritocratic education policy has served as a key idea in improving social mobility (Owens & de St Croix, 2020). As detailed across this review, the use of ideas of meritocracy allows for an explanation of social and economic disparities to be centered on the individual and their behaviour. For education, this serves to put a core focus on individual student academic behaviour as opposed to the environmental circumstances and structural inequality that are also critically at play in explaining success and failure of student outcome (e.g., Sirin, 2005).

Left alone as the sole operating principle in understanding inequity and marginalization, meritocracy justifies existing and continually reconstituted structural inequalities within society as fair and ongoing processes that occur within education and the labour market (Brown et al., 2016). Much like the international educational discourse around meritocratic social mobility (Smith & Skrbiš, 2017), the policy context in England centralizes ideals that success is defined by effort and any disparities that exist in education opportunities are deserved. However, these ideals do not recognize the societal, economic, and structural challenges that many of England's

students face in their ongoing schooling experiences that also influence disparities in student outcomes.

In a case study focussing on the students and teachers at a large London, UK comprehensive secondary school, Owens & de St Croix (2020) explore the ideals of meritocracy as well as structural inequities embedded within students' lives from the perspectives of students and teachers. While the school's mission or ethos was drawn from ideals within meritocratic systems (effort, focus, and success), the students and teachers situated these ideals within the context of their personal experiences and the challenges embedded within their lives. Here, poverty and racism intersect with effort and success to create a much more complicated picture of merit and opportunity (Owens & de St Croix, 2020). Owens & de St Croix (2020) show the contradictions inherent in meritocratic policy narratives in England and challenge the notion that meritocracy can serve as a pathway to achieve social mobility and social justice without a more critical consideration of the social inequalities within societies and the ways through which these inequities are replicated over time within public education (Jin & Ball, 2020; Owens & de St Croix, 2020).

China

The education system in China over the past two decades relies heavily on exam performance and student ranking to stream students in specific schools that largely dictate subsequent school-based opportunities through to post-secondary education (e.g., Postiglione et al., 2017; Jin & Ball, 2020). Research undertaken by Jin & Ball (2020) found that students seek to achieve a certain degree of upward social mobility through their educational performance. Jin & Ball (2020) argue that amongst other things, this tiered examination system serves to identify high-performing students for new opportunities while also distancing them from their communities, personal histories, and cultures. While operating as a system of social mobility for these students, the system is also supporting a definition of these communities from which the student is seeking to leave as deficient or undeserving (Jin & Ball, 2020).

The jurisdictional examples just discussed, amongst other things, show the flexibility and diversity that merit-based beliefs can inhabit within educational policy. The role that cultural capital plays in defining success seems implicit within meritocratic elements of educational policy just discussed (Bourdieu et al., 1990). The work of Bourdieu et al. (1990) illustrates that what is valued—what is considered knowledge, or capacity—are all defined by the dominant ethnicity or cultural groups.

When these artifacts then are considered demonstrations of merit, this, in turn, can support education systems that function less as social mobilizers and more as social reproducers of the existing structures and values that have served to marginalize some and privilege others (Bourdieu et al., 1990). Other forms of knowledge, cultural artifacts, and capacities that are important parts of historically underserved communities, or not part of dominant groups, are then not recognized as part of the knowledge systems that public education is meant to support and reproduce in the development of student knowledge and the measurement of student achievement. However, students and communities bring a variety of knowledge systems and cultural capital that are critical to include alongside more traditional definitions of success (e.g., Ladson-Billings, 2009). The following section briefly explores this approach to policy and system work within public education.

Diverse Learning Opportunities Aimed at Equity in Education

Over the course of this paper's discussion, ideas of academic success, as well as the resulting opportunities due to success have received considerable attention. However, how success is defined and what constitutes knowledge within education is also an important consideration in this discussion. The degrees to which knowledge becomes standardized enough to compare performances amongst a large number of students is often directly connected to a very narrow interpretation of what is meant by success (the correct answers on a multiple-choice test) (as an example, Gillborn & Youdell, 2000). Here, the connections between the dominant groups or class within a society and the sets of knowledge systems, often reified within jurisdiction

curriculum documents, can become connected or even reflections of each other (Bourdieu et al., 1990). A common theme across this discussion has been the use of standardized assessments for students to demonstrate merit or skill (e.g., Corcoran & Baker-Smith, 2018; Au, 2016). Knowledge derived from standardized assessments is often bounded by very narrow parameters. As the purpose of these assessments is to measure and compare large populations of people often from diverse backgrounds, socioeconomic status, cultures, and ethnicities, the diversity and flexibility of the capacities that can be measured are limited.

However, in addressing historically marginalized students and communities, tapping into diverse forms of knowledge and cultural narratives is a critical part of establishing classroom pedagogic conditions that are inclusive and representative of diverse student populations. This is especially the case for historically marginalized, often racialized students within schools and classrooms (Braithwaite, 2010; Ladson-Billings, 2021). Where system-wide measures of education success struggle to address culturally relevant pedagogic approaches, tapping into community and cultural knowledge as a form of academic success can build relevance and representative forms of local success. (Munroe et al., 2022). In so doing, diverse and distinct definitions of student success or merit can co-exist. There is preliminary evidence, within a variety of diverse studies in the TDSB, that standardized assessments and local forms of demonstrated knowledge can potentially support each other in advancing improvement in learning experiences (De Jesus et al., 2021; Brown et al., 2020).

Building a responsive and representative pedagogic approach that both recognizes and defines knowledge and success from students' own communities and cultures is well established as critical across a variety of jurisdictions and student populations. Some examples amongst many, Klenowski (2009) highlights the value of anchoring Indigenous culture and relationships as a form of assessment as well as details story telling within mathematics achievement for Australia's Indigenous students (Klenowski, 2009). Ferguson-Patrick (2020) analyzes Swedish primary school teachers' classroom observations to highlight the value of cooperative learning stances as relevant and responsive approaches to refugee student learning. Here, cooperative

learning supports language acquisition and cognitive engagement (Ferguson-Patrick, 2020). Martin et al. (2018) studied Science, Technology, Engineering, and Math (STEM) constructivist learning over a two-year period in which they democratized the knowledge hierarchies so prevalent in STEM learning by protecting group learning spaces and authorizing student-directed inquiry and iterative development of project work.

Collectively, these examples are locally driven approaches to classroom learning and success. As such, they are difficult to support within a merit-based approach to education equity in that they are highly responsive to the diversity of the student populations that they support. They generate or define value in learning and knowledge acquisition through interactions and relationships with the communities that the school serves. This creates learning experiences for students, whose outcomes are both essential for their engagement and success, which are difficult to standardize, measure, and compare across large jurisdictions. Exploring ways that such approaches might be incorporated within jurisdictions that also rely on large-scale assessments to define success and justify learning opportunities drawn from these representations of success may prove critical to successful approaches to equity.

Canadian Context and Its Meritocratic Interventions

In Ontario, there has been considerable debate as to how schools and school systems should support students with different abilities as well as interests (Gaztambide-Fernandez & Parekh, 2017). Gaztambide-Fernandez and Parekh (2017) explore the relative homogeneity of both secondary school art programs as well as the small number of feeder middle schools for these programs as a way to unpack notions of access to diverse learning opportunities. From an equity perspective, George et al. (2020) assert that policy in Ontario and British Columbia treats racism as an individual behaviour rather than an institutional or structural issue within education. This approach creates a contradictory policy discourse in which diversity is honoured in Canada as being an important part of nationalism, while differences amongst cultures and

racism are often ignored or marginalized as being products of individual behaviors (George et al., 2020).

The marginalization of diverse knowledge systems within public education becomes especially problematic when attending to racial disparities in educational outcomes as explanations and resulting actions are too often conceptualized at individual instead of structural levels. This limits the kind and quality of potential interventions and resources that may be put into play to address these disparities (Au, 2016). TDSB participation and outcome data has highlighted the disproportions of students accessing a variety of specialized learning opportunities. Central Student Interest Programs (CSIP) and the International Baccalaureate program, all are underrepresented by certain populations of students (Gaztambide-Fernández & Parekh, 2017; Toronto District School Board, 2022). At the same time, the TDSB is committed to providing equity of opportunities for all its students. Collectively, this creates tensions in where these programs exist in the city and how students access them. Considerations of both student merit and structural inequity that challenge notions of 'equal chance' (central to merit-based admission approaches) then become important points for consideration, understanding, and new action.

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