ABSTRACT

Title of Dissertation: THE TEACHER SHORTAGE ISSUE IN CUBA: HOW THE CHANGES IN ITS ECONOMIC SYSTEM IMPACTED TEACHERS DECISION TO ENTER, REMAIN, OR LEAVE THE PROFESSION

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Cuba has suffered from the severe economic constraints since the demise of the Soviet Union in 1991, and as a response the government directed various economic policies that largely dealt with the opening of the market economy. The expansion of the tourism industry was one of them, and many teachers left the profession to seek opportunities that allowed access to foreign currency. Although there have been other periods of teacher shortage in Cuba, the post-1991 era has witnessed an almost continuous situation of teacher shortage.

The purpose of this study is to focus on the issue of teacher shortage in the contemporary Cuba and analyze how the changes in its economic system, particularly the opening of the market economy, have impacted teachers' decision to enter, remain, or leave the profession. To address this question, I conducted a qualitative study, relying primarily on semi-structured

interviews with 22 teachers, who were in various stages of their careers, in Havana, Cuba. The study was informed by Bronfenbrenner's ecological systems theory and human capital occupational decision-making theory and contextualized by a review of policy documents and other literature.

For analytical purposes, the informants were divided into groups based on the different historical periods they entered teaching. The overall trend has been that the more senior teachers are, the more likely they are to depend on high level of factors (i.e. social norms, values, perspectives on the government) when they make occupational decisions. However, few factors were equally represented by all groups such as the interest in teaching (individual level), poor teaching environment in public schools (microsystem), low teacher salary and alternative jobs (exosystem), and perspectives on the government (macrolevel). In some cases, the same factor applied in different ways for different groups. For example, poor teaching environment provided for younger cohort of teachers a rationale to drop out, while for the older cohort, it served them as motives to persist and demonstrate solidarity by continuing teaching even after retirement.

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List of Abbreviations

APC	The Association of Cuban Educators
B&B	Bed and Breakfast
CUC	Cuban Convertible Peso
CUP	Cuban Peso
DPMAD	Manuel Ascunce Domenech Teaching Detachment (Cuba)
FEU	Federation of University Students (Cuba)
GDP	Gross Domestic Product
ICT	Information and Communication Technologies
IESALC	The UNESCO International Institute for Higher Education in Latin America and the Caribbean
IMF	International Monetary Fund
ISP	Tertiary Level Pedagogical Institute (Cuba)
KOICA	Korea International Cooperation Agency
LLECE	Latin American Laboratory of Evaluation of Quality of Education
MINED	Ministry of Education in Cuba
MOE	Ministry of Education
NCEE	National Center on Education and the Economy
NGO	Non-Governmental Organization
OECD	Organization for Economic Cooperation and Development
OEI	Organization of Ibero-American States
ONE	National Office of Statistics (Cuba)
PCC	The Communist Party of Cuba
PGI	Comprehensive Junior Secondary Teacher
PISA	Program for International Student Assessment
SEdC	State Education Commission (China)
UCPEJV	Enrique José Varona Pedagogical Science University (Cuba)
UH	University of Havana
U.K.	United Kingdom
UNESCO	The United Nations Educational, Scientific and Cultural Organization
U.S.	United States
USD	US Dollar
USSR	Union of Soviet Socialist Republics
YSP	Yes I Can (Cuban Literacy Program)

Chapter 1: Introduction

1.1 Purpose of the Study

The main purpose of this study is to focus on the issue of teacher shortage in the contemporary Cuba and analyze how the changes in its economic system, particularly the opening of the market economy, have impacted teachers' decision to enter, remain, or leave the profession. It also taps into the context, government responses, and teachers' actions of other societies that underwent similar movement towards a market economy to compare against Cuba.

Cuba has suffered from the severe economic constraints since the demise of the Soviet Union in 1991 coupled with the economic sanctions, namely the embargo, strengthened by the U.S. government in the early 1990s. As a response, the Cuban government designated this time of economic difficulty as 'the Special Period' (*el Período Especial*) and directed various economic policies that largely dealt with the opening of the market economy. The expansion of the tourism industry was one of them and was actively pushed by the government to attract foreign currency. In order to facilitate the process, Cuba created a parallel economy utilizing a different currency, Cuban Convertible Peso (CUC) which matches with 1 USD and the value amounted to 24 times more than the local currency (Cuban Peso, CUP).

The changes in the economy signal changes in the labor market, and the teaching force was one of the professions that experienced a drastic change. Many teachers left the occupation to seek opportunities that allow them access to CUCs such as tour guides, interpreters, housekeepers in a hotel, etc., and the issue of teacher shortage has been a growing concern ever

since.[1] The problem, however, not only derived from the exodus of teachers but is also being aggravated by the students' reduced interest in becoming teachers. For example, the enrollment in pedagogical universities as well as the graduation rate has plummeted since the latter half of the 1990s and the high drop outs in the teacher training institutes made it difficult for the government to plan for the teachers' coverage in the classrooms (García Ramis, 2004). This study, therefore, seeks to capture the emerging problems of teacher recruitment and retention in Cuba and examine how the teaching profession, which was considered one of the most prestigious and competitive occupations in the country, resulted in a chronic shortage over the past two decades.

1.2 Background to the Problem

This research delves into the teacher shortage issue widely felt and officially communicated in the country. The Ministry of Education (MOE) reported that in September 2014, the academic year began with 7%[2] of teaching positions (10,800) left unfilled.[3] The teacher shortage is prevalent across Cuba[4] but the deficit is the largest in Havana. The city had to hire 3000 teachers from other provinces to make up for the gap in local applicants.[5] Pinar del Río, Las Tunas, Granma, and Guantánamo, for example, suffered less and exported their teachers to the neighboring provinces with larger deficits.[6] What has been noted throughout the

[1] https://www.efe.com/efe/english/life/cuba-begins-school-year-with-challenge-to-update-system-train-more-teachers/50000263-3369710

[2] This 7% of teacher shortage has continued to the current academic year of 2017-2018. Retrieved from: https://www.efe.com/efe/english/life/cuba-begins-school-year-with-challenge-to-update-system-train-more-teachers/50000263-3369710

[3] http://www.laht.com/article.asp?CategoryId=14510&ArticleId=2353084

[4] In 2013, almost 7,000 teachers had officially resigned and left the occupation. Retrieved from: http://www.laht.com/article.asp?CategoryId=14510&ArticleId=2353084

[5] http://www.ipsnews.net/2013/12/growing-number-private-operators-cuban-education/

[6] http://www.ipsnews.net/2013/12/growing-number-private-operators-cuban-education/

phenomenon is that the more teachers are exposed to other sectors that offer a better pay, the more teachers are tempted to abandon the school system and perform in other functions.

The shortage of teachers not only derives from a problem of retention but gets amplified by that of the recruitment. For example, an article noted that during the academic year of 2015-2016, 9,000 teachers entered the system with only two-thirds being the graduates of teacher training institutes (i.e. pedagogical universities or teacher formation schools), and the rest were the retired teachers returning to the classroom.[7] The data on the number of students who enrolled and graduated from university majoring in education echo the problem of teacher recruitment. Between 2011 and 2015, the number of students who enrolled halved from 44,000 to 20,000, and the number of graduates shrunk in an even greater margin from 18,000 to 2,900 (ONE, 2017a). When calculating the graduation rate for 2016, it was found that only one out of 20 students who first enrolled in 2011 graduated on time (ONE, 2017a).

1.3 Research Question

Given the aforementioned context in Cuba, this dissertation study sought to address the following research question:

> Before, during, and after the Special Period, why did individuals enter, remain in, or leave teaching as a profession?

1.4 Overview of the Dissertation

This dissertation study largely consists of five parts: 1) an extensive review of literature that helps to frame and understand the teacher shortage issue in Cuba, 2) the historical overview of the dynamic between teachers and education system in Cuba, which at times experienced a severe teacher shortage, 3) a section on the conceptual framework and methodology utilized

[7] https://iwpr.net/global-voices/cubas-teacher-shortage

when answering the guiding question, 4) career histories of 22 informants interviewed for this study, and 5) the inductive and deductive coding results of this qualitative research along with policy implications and conclusion drawn from the analysis. Each chapter is organized as follows:

Chapter 2 and 3, based on reviews of the literature, outline what constitutes teaching as a profession and how it manifests differently in various social contexts, particularly in transitional states. Teacher training, professionalism, income, and job satisfaction are the few themes that guide Chapter 2. Chapter 3 refers to the experiences in countries such as China, Russia, and other post-Soviet countries and notes on how the changes in the economy, in this case the opening of the market economy, created a different environment for teachers' employability and often generated an exodus and a shortage of teachers. The review of countries that experienced similar movement toward the opening of the market economy helps to better situate and understand the phenomenon of teacher shortage in Cuba.

Chapter 4 centers on the dynamic between the education system and teachers in Cuba and how, at times, the education system experienced a periodic or chronic shortage of teachers. It intends to provide a historical overview of education and teachers and analyzes how the education system as well as the specific social contexts shaped and yielded relevant teacher policies. The chapter is organized in the chronological order of Cuba, from the "Triumph of the Revolution" to the early revolutionary days, from the 1970s to the 1980s, the demise of Soviet Union and the "Special Period" of the 1990s, and the 2000s to more current days.

Chapter 5 introduces the guiding conceptual framework of this study. It draws upon Bronfenbrenner's ecological systems theory, focusing on the relationship between the society

and an individual, and outlines how multiple layers of the society influence the development of an individual. In addition, human capital theory of occupational choice supports this study by delving into the process an individual engages in to determine whether or not to enter and remain in a particular occupation.

Chapter 6 delineates the execution of this qualitative study and introduces the research design, justifications for this particular research domain, and strategies for data collection and analysis. The section closes with outlining the researcher's positionality and noting a few ethical concerns for this research.

Chapter 7 introduces the career histories of 22 informants who were interviewed for this study. The histories mainly include their personal background and the milestones of their career, such as entry, teaching experience, leaving, or continuing teaching even after retirement. The career histories illuminate the informants' stories of how and why they made such occupational decisions. The informants were divided into six groups based on their stage in the teaching career, from preservice preparation to the continuation after retirement.

Chapter 8 presents a discussion of the findings, first focusing on the factors that influenced teachers' occupational decision making, at the individual, micro-, exo-, and macro-levels. Second, it discusses the findings comparing across groups of interviewees, defined by time period when they entered the field. Following the discussion of the findings, I identify the implications of this study for theory and research on teacher occupational decision making, for research methodology, and for policy/practice. This chapter ends with a conclusion section which discusses possible future research topics.

Chapter 2: Teaching as a Profession

2.1 Introduction

Attention to teachers is on the rise. In the industrialized world, teachers have been acknowledged as a key determinant to students' performance and it has been quoted that "the quality of an educational system cannot exceed the quality of its teachers" (Barber & Mourshed, 2007, p. 15). In the developing world also, now that most developing countries are expected to or are close to achieving universal primary education,[8] education interventions have shifted gears to providing quality-oriented measures which in many cases involve enhancing the quality of teachers in the classroom.

The growing attention to teachers is a consistent trend around the world; however, depending on the societal context that a teacher teaches, what constitutes teaching and how the profession is perceived by the public differ extensively across countries, locations, time periods, etc. For example, the entry requirement for students to be trained as a certified primary teacher tends to be higher in wealthy nations compared to that in the developing countries. The social status of teachers, even within one country can differ across locations, such as rural vs. urban schools, depending on teachers' relative level of education and salary within the community. In addition, the trend has been that across time many countries have elevated the minimum standards for teaching certification as they look for more knowledgeable and skilled teachers who can better prepare students in the global economy.

As such, the purpose of this chapter is to tease out the elements that constitute teaching, such as teacher training, social status, professionalism, income, and job satisfaction; portray their

[8]There was an increase in the primary school net enrolment in the developing world from 83% in 2000 to 91% in 2015. Retrieved from: http://www.mdgmonitor.org/mdg-2-achieve-universal-primary-education/

interconnectedness and dynamic interaction with the distinctive societies; and outline their various manifestations. The second part of this chapter focuses on particular contexts, that of the societies that go through an economic transition, moving from the communist and socialist economy to a market economy, and analyze how the changes in the economic system impact the work and lives of teachers. In terms of sampling teachers and their experience in the transitional states, I drew upon the cases of China and post-Soviet countries as they both employed a large-scale economic reform and have partially and fully opened to the market economy since the 1980s and the 1990s, respectively.

2.2 Teacher Training

Christopher Day, who has been notably prolific in writing on the life and work of teachers, along with his colleagues (2006), outlined that teachers commonly pass through the five broad phases of "1) launching a career; 2) stabilization; 3) new challenges and concerns; 4) reaching a professional plateau; and 5) the final phase" (p. 174). Most teachers, in one way or another, receive training throughout their career and this training is commonly classified in two terms, pre-service and in-service training. Pre-service training refers to the formal arrangements established to prepare and certify teachers and takes place before their employment in schools. In-service training is offered when teachers are serving students in the classrooms which is in line with their continuous professional development.

Standards in Entry

As noted in the introduction, the prerequisite to participate in a pre-service training differs vastly across social contexts. The minimum standard required for entry into a primary teacher training program, for example, oscillates between the graduates of primary school and

those of the tertiary institutions. Nigeria initially asked the primary teachers to hold Grade II Teaching Certificate which required 5 years of pre-service training after graduating from primary schools (Adedeji & Olaniyan, 2011; Owojaiye & Fariwontan, n.d.). In 2004 however, the government discarded the Grade II Teaching Certificate and fixed the minimum certificate for primary school teachers to be the National Certificate of Education which required 3 years of training in a postsecondary institution (Adedeji & Olaniyan, 2011).

In Indonesia, the Teacher Law enacted in 2005 mandated teachers in all levels of education to hold a minimum of a four-year college degree, which was an increase from two years for primary school teachers and three years for junior secondary teachers (Chang et al., 2013). This new requirement, in fact, resembles what is most common for beginning teachers in the advanced economies, that is, college graduates with courses on education and field experiences, including student teaching.

The nature of teacher colleges differs depending on the societal context in which a student aspires to be a teacher. In the US, recent trends have been to reduce the requirements, diversify recruitment routes, and allow for more open entry to teaching (Boyd, Grossman, Lankford, Loeb, & Wyckoff, 2005; Darling-Hammond, 2016; Imig, Wiseman, & Imig, 2011). The intention is to mass produce teachers instead of investing heavily in a small group to generate highly qualified professionals – a strategy criticized by Lortie in *Schoolteacher: A Sociological Study* in 1977.

In countries known for their highly qualified teachers, the education system makes admission to teacher preparation programs extremely selective. Countries such as Finland, Korea, and Singapore come up with multiple incentives to recruit highly competent students;

they sometimes fully cover the tuition of the preparation program or provide students with a stipend while they train (Auguste, Kihn, & Miller, 2010). Hence, these systems manage to recruit 100% of their teaching force from the top third of the academic cohort, when less than a quarter of new teachers in the U.S. come from the same classification group (Auguste et al., 2010; Ingersoll, Merrill, Stuckey, 2014).

Characteristics of the Teaching Population

The general composition of the teaching population is heterogeneous in that some are driven by professional motives of teaching (i.e. the love of a subject matter, contact with young people, and the societal mission of nurturing the future generation) (Huberman, Grounauer, & Martí, 1993), while others choose it based on a compromise. Lortie (1977) referred to the latter as "blocked aspirations and convertibility," indicating that teaching provides a second chance for those who do not make it as doctors or business executives and offers them with a stratification safety net "to land without severe damage to their status aspirations" (p. 50).

Due to the caring role of teaching, it has come to be defined as the work of women in many societies. It is depicted as more reputable work for females and is often reserved for wives and mothers as accommodating positions to maintain the work and family balance. The differential occupational opportunities perceived by women and men, leaning towards the relative disadvantage for women, allowed teaching to rank higher for females in terms of their occupational preference. Male teachers, more commonly in the secondary level, "do not aim for a career in teaching but are attracted to it through the subject matter in which they acquired their university degree" (Huberman et al., 1993, p. 109) and tend to work for few years and ultimately move into educational administrative positions or leave the occupation.

Continuous Professional Development

"Given the rapid changes in education, the potentially long careers that many teachers have and the need for updating skills" (Schleicher, 2016, p. 42), the professional development of teachers is viewed as a lifelong learning, and the pre-service training is conceived as the foundation for ongoing learning rather than a process of producing ready-made professionals.

Continuous professional development is provided through multiple channels such as teachers' organizations, districts, regional centers, and individual schools. In Canada, specifically in the state of Alberta, it is the teacher association that spearheads the teachers' professional learning, spending half of its budget on developing relevant programs (NCEE, 2016). The state government also heavily invests in supporting teachers' professional growth; it launched a major initiative in 2000, whose purpose was to engage teachers in developing and implementing projects to improve student learning (NCEE, 2016). This program echoes the recent scholarship that criticized the limited scope of teachers' professional development that is training-oriented and called for more innovative "modes that are grounded in inquiry, reflection, and participant driven experimentation, naming the role of teacher-researcher as an appropriate means" (Levin & Rock, 2003, p. 135).

The participation of teachers in these professional development opportunities is intentionally voluntary, so that they can align with the career plan and the self-assessment of individual teachers. In Canada as well as in Finland, where teachers are considered valued professionals with a full responsibility of their work (NCEE, 2016), the following is prevalent:

> there seems to be the belief that investing in teacher learning carries with it a form of internal and informal teacher evaluation and accountability, and that the kind of formal

teacher evaluation practices that are growing in popularity in the United States and some other countries, are unnecessary. (p. 6)

Professionalism

The culture of teachers' professional development and the level of their commitment and engagement reflect the overall professionalism of teachers in the society. Professionalism commonly refers to "the level of autonomy and internal regulation exercised by the members of an occupation in providing services to society" (Schleicher, 2016, p. 36). When applied to teaching, professionalism can be determined by the level of teachers' knowledge, autonomy, and the peer network (Furlong, 2001), and its meaning and nature can vary significantly depending on the society in which a teacher is teaching.

Drawn from the discussion above, teacher professionalism in Canada and Finland is relatively high based on the level of acknowledgement and autonomy they receive as professionals. Education systems in East Asia, another group of usual high performers in PISA, however, usually grant less autonomy to teachers, who are expected to follow the standards and implement curricular approaches defined by the government. Teachers in Shanghai, for example, have a narrow space for interpretation of curricular objectives, as the municipal government assumes a full control of the policy design, school management, and improvement of teachers' instruction (Lai & Lo, 2007). This suggests that the degree of decision making and the control over school processes that teachers are accorded are greatly influenced by cultural norms and government policies (Schleicher, 2016).

The general portrayal of teaching force in the US, frequently referred to as a second-choice occupation with a high turnover (Ingersoll et al., 2014), informs the way in which its

teacher professionalism is defined. The low selectivity, in particular, facilitates an easy in and out mobility to the occupation. Also, due to the high attrition, teachers have a hard time building a firm colleagueship and a common technical culture. Another aspect that is detrimental to developing teacher professionalism is the widespread perception that "anyone can teach," which originates from the earlier memories of attending schools. Lortie (1977) asserted that this notion echoes "society's historical reluctance to invest heavily in pedagogical research and instruction" (p. 62) and criticized that "teaching has not been subjected to the sustained, empirical, and practice-oriented inquiry into problems and alternatives which we find in other university-based professions" (p. 69). All of the above explain and reinforce the low standing of teacher professionalism in the U.S.

2.3 Social Status

Added to this vicious cycle is the low social status of teachers in the US which largely remained unchanged for decades. Lortie (1977) defined teachers' social position to be "special but shadowed" (p. 10). He highlighted the ambiguity in their social standing and outlined that teaching is, at times, honored and praised as dedicated service and, in others, disdained and lampooned as easy work. The lack of respect for teaching as a professional work continues to the current days. In a study led by Varkey Foundation (Dolton, Marcenaro, De Vries, & Shen, 2018), the US public ranked teaching to be the 8th in order of respect among 14 professions, including doctors, nurses, librarians, and social workers. And in a study commissioned by Education International, Stromquist (2018) found that education union leaders in the US did not identify teaching as the most respected occupation in their country.

Lortie (1977) also outlined the teachers' subordination vis-à-vis school administrators and professors, who are often presumed as persons with greater expertise and standing. He lamented that while teachers are clearly in charge and most expert in day-to-day operations, they do not have control of any area of practice. Day and his colleagues (2000) reiterated this point and noted that:

> teachers are seen as easy targets for change from a political and administrative level . . . ideas frequently emanate from those outside the school system and changes are mandated from the top . . . often without adequate or appropriate support and assistance. (pp. 3-4)

Based on the argument above, it can be concluded that the lack of autonomy of teachers in the U.S. (argued by Lortie) and the U.K. (by Day) is in part due to their low professionalism and low social status. This reversely suggests that in countries where teachers' autonomy and professionalism are relatively high, teachers' social status can be expected to be high. For instance, there are only few occupations in Finland that have higher social status than schoolteachers. It was possible through "raising the bar for entry and granting teachers greater autonomy over their classrooms and working conditions than their peers enjoy elsewhere" (Schleicher, 2011, p. 17).

However, it must be noted that the professional autonomy that Finnish teachers enjoy today was not built in a day. It is a product of multiple educational reforms which have taken place since the 1990s (Sahlberg, 2007). The education system in Finland until 1985 was highly centralized and schools were strictly regulated, and a dense network of rules and orders regulated the daily work of teachers (Sahlberg, 2007). This Finnish experience suggests to the countries

devoid of adequate teacher professionalism and social status, that the holistic approach must be assumed. It calls for a high selectivity in the entry to teacher preparation program, continuous professional development, satiable working condition, and adequate salary in order to establish teaching as an attractive profession in their society.

2.4 Income and Rewards

In the context of the US, I have discussed that the low standard in entry to teaching failed to recruit the most academically competent students, that the notion of "second-choosers" failed to train them as high professionals, and that the combination of these aspects contributed to the low social standing of teachers. In explaining their low social status, several scholars (Lortie, 1977; Vegas, 2005; Villegas-Reimers, 1998; Waller, 1932) have associated it with the salary range teachers in the US receive. It tends to be inappropriately low, given the level of education they receive and the role they play in the society (Dolton et al., 2018). In fact, teacher salary in much of the US is too low to sustain a middle class living. According to Podolsky, Kini, Bishop, and Darling-Hammond (2016), "in 30 states, mid-career teachers who head families of four or more are eligible for government subsidies such as subsidized children's health insurance or free or reduced-price school meals" (p. 5).

Hoxby and Leigh (2004) argued that the compression of teaching wage is responsible for the decline of the average teacher aptitude in the United States. They asserted that teachers' low income explains about three-quarters of the decline in their aptitude (Hoxby & Leigh, 2004). They posited that "the greater pay parity with males in nonteaching occupations may have drawn able women out of the teaching" (Hoxby & Leigh, 2004, p. 1) and have caused the damage to the

overall quality of teachers. A similar study was conducted by Corcoran and his colleagues (2004) which argued that,

> over the 1964-2000 period, women near the top of the test score distribution became much less likely to enter the teaching profession than their peers near the middle of the distribution. The apparent consequence has been a much lower representation of women of very high academic ability in the pool of elementary and secondary teachers. (p. 467)

It is in fact a worldwide trend that teachers are paid relatively lower than their educated peers in other occupations. Among the OECD countries in 2010, statutory salaries for teachers with 15 years of experience, on average, rate 80% of full-time earnings for 25-64-year-olds with tertiary education, and below 60% in countries like Italy, Slovenia, and the US (Schleicher, 2011). Countries that manage to recruit top students in the academic cohort, such as Korea (top 5%) and Singapore (top 30%), pay their teachers on par or higher than the country's GDP per capita (Auguste et al., 2010). In 2007, the starting salary for primary school teachers as percentage of GDP per capita was 128% in Korea and 100% in Singapore, and 15 years into their career, these percentage took a great leap to 220% and 200%, respectively (Auguste et al., 2010).

Singapore, in particular, has been extremely methodical about designing and employing a unique compensation system to recruit and retain its high-quality teachers. The Director of Personnel in the Ministry of Education in Singapore spoke in an interview that the "compensation matters when you want to get those people who are high quality, have some interest in teaching but also many other career choices" (Auguste et al., 2010, p. 16). From the beginning of their career, in Singapore there is no tuition for students who are trained in the National Institute of Education, the country's teacher training university, and they earn a small

stipend during their training (Auguste et al., 2010). Moreover, the government closely monitors the starting salary in the market to make sure that new teachers are paid competitively against their university peers and provides a relatively staged salary so that when 15 to 20 years into their careers, teachers still fare relatively high compared to the scenario if they were to pursue in other careers (Schleicher, 2011).

An OECD study pointed out the determinant role that a teacher salary plays in terms of attracting and retaining teachers. It alarmed the countries that do not adequately pay teachers and provided a rationale why teacher salary needs to remain relatively high for its education system to manage a stable supply. It noted:

> where teachers' salaries are low relative to professions requiring similar qualifications, teacher supply appears to be price-elastic: for a given percentage increase in teachers' relative salaries, the supply of potential teachers increase by a greater percentage. [By contrast, in] countries where teachers 'salaries are already relatively high, teacher supply tends to be less elastic: a given percentage rise in salary produces a lower percentage increase in supply. (Schleicher, 2011, p. 18)

In sum, in the country where teachers are not competitively compensated, the in- and out-bound mobility to teaching occurs frequently. For example, the attrition rate of teachers is 14% in the US and reaches up to 20% in high-poverty schools, whereas the rate is only 3% and 1% in the countries such as Singapore and Korea.

2.5 Job Satisfaction

A good salary, in fact, is not a determinant factor to teacher's job satisfaction. A balanced combination of extrinsic and intrinsic motivations[9] enables teachers to enjoy their occupation. Day and his colleagues (2006) conducted an interesting study on factors that impact teachers' teaching and subsequent pupil progress and outcomes. Some of the factors they identified ranged from the political, environmental, and structural aspects (i.e. school and departmental leadership/culture, professional development opportunities, nature of school population, and changes in social conditions), to more emotional and sentimental ones, such as motivation and morale, passion and commitment, and satisfaction through pupil progress and achievement (Day et al., 2006).

Day and his colleagues (2006) labeled the latter group as the "professional health" and argued that it is most positively stimulated when the "desire to help children and to contribute to society" (p. 181) is at its highest. Those that are detrimental to their professional health, however, were "the external burdens (non-teaching tasks)" that accompany the already existing workload (Day et al., 2006, p. 181). They added that this external stress affects the most the teachers with at least eight years of teaching experience (Day et al., 2006). They argued that more experienced teachers were critical and resistant to the removal of opportunities to exercise teaching and be distracted with non-teaching related tasks.

Another study administered across 12 countries echoed the above finding that teachers want to socially contribute and help the next generation. It noted that "people who choose teaching as a career are motivated by a complex interaction of factors embedded within

[9] Extrinsic motivations include job security, salary, long vacations, etc. and the intrinsic motivation involves the interest in the subject matter, contact with young people, the desire to serve others, etc. (Huberman et al., 1993).

communities and cultural expectations, and seem generally to embrace a desire to undertake meaningful work that makes for a better society" (Watt, Richardson, & Smith, 2017, p. 1). In the country like Finland, where compensation for teachers is good, salary is rarely stated as a driving motivation. However, it must be noted that "unless school systems offer salaries which are in-line with other graduates' starting salaries, these sample people [= competent graduates] do not enter teaching" (Barber & Mourshed, 2007, p. 20). In other words, it is paramount that the intrinsic motivations be buttressed and balanced with the adequate extrinsic motivations in order for an education system to maintain a healthy supply of quality teachers.

Chapter 3: Teachers in Post-Socialist, Transitional States

This chapter delves into a particular context of the societies going through an economic transition, moving from the communist and socialist "planned" economy to a market economy, and analyzes how the changes in the economic system impact the work and lives of teachers. It draws upon the cases of China and selected post-Soviet countries as they both employed a large-scale economic reform and have partially and fully opened to the market economy since the 1980s and the 1990s, respectively. I consider the review on teachers from post-socialist and transitional states to be relevant and necessary because their experience provides a reference point to Cuban teachers. It offers insights into what might take place in Cuban teaching force, as a consequence of economic constraints and changes in the system in Cuba after the demise of Soviet Union.

The composition of this section reflects the following. First, it outlines the economic transition in China and the USSR, then discusses its impacts on teachers. It provides a stark contrast of teaching as a profession between before and after the opening of a market economy with regard to teachers' salary, social status, the selectivity of the entry to the profession.

3.1 Transition to the Market Economy

In 1978, at their third plenary session of the Community Party in China, the Central Planning Committee released the country's economic and social development strategy and presented a nationwide socialist modernization process, which was to be undertaken in four aspects of agriculture, industry, national defense, and the area of the science and technology (Coase & Wang, 2016). With respect to agriculture and industry, the advancements in these areas were pressing because more than 100 million farmers lived below the poverty line due to the

slow development in agriculture (Lewin, Little, Xu, & Zheng, 1994). Three major approaches that underlay the economic reform in the 1980s were the following: a move (1) from a socialist planned economy to a socialist market economy, (2) from the state's full control of the production to a more autonomy for the producers, and (3) from a national economy which is self-reliant to an economy that participates and competes in the global economy (Coase & Wang, 2016; Lewin et al., 1994).

For instance, under the socialist market economy in 1984, individual families were able to participate directly in the market and sell their products through a "responsibility system" in which producers were granted the autonomy to manage and be responsible for the profits they make in the market (Lewin et al., 1994). Moreover, areas like Shenzhen and Pudong were developed and assigned as special economic zones and drove Chinese export-oriented economy by establishing joint ventures with foreign investors and importing advanced technology and goods through active international trade (Lewin et al., 1994).

In the USSR during the same period, economic shortfalls were brought to light and indicated serious structural problems in the Soviet society. Some included: "the limitations of economic centralization, the cost of sustaining the military, the lack of appropriate incentives in the workplace, and a disconnect between technology innovation and industrial production" (Sievers, 2013, p. 5). However, what was critical and hindering the growth of the USSR were the enduring problems of lack of civic freedoms and corruption within government. When Mikhail Gorbachev ascended to the leadership in 1985, he saw these problems as errors of design and judgment and suggested tackling "through decentralization of economic and political decision-

making, greater civic freedoms, and an encouragement of public dialogue to introduce accountability to political leadership" (Sievers, 2013, p. 6).

As a part of this movement he employed an economic reform (*perestroika,* "restructuring") along with a political campaign (*glasnost,* "openness"), which largely dealt with decentralizing and democratizing the Soviet Union. Glasnost, for instance, established the multi-candidate election system, reduced the dominance of the Community Party, and allowed for an open discussion that included the criticism of government officials and free dissemination of news and information (Gibbs, 1999; Long & Long, 1999; Sievers, 2013). Perestroika, in addition, facilitated the process of decentralizing economic decisions, which meant sharing and delegating country's governance to the local authorities and encouraging enterprises to become self-financing (Gibbs, 1999; Long & Long, 1999).

This push towards openness and restructuring, however, resulted in a coup (1991 Soviet coup d'état attempt, August Coup) that destabilized the overall Soviet system and contributed to the demise of the Communist Party as well as the USSR. Even after the August coup in 1991, Gorbachev reiterated the importance of Perestroika. He said, "[the country needs] economic freedom, political freedom, escape from isolation, and the inclusion of the country in the mainstream of civilization!" (Long & Long, 1999, p. 77).

3.2 Impacts of Economic Transition on the Teaching as a Profession

After the demise of the Soviet Union in 1991, the independent governments of ex-Soviet countries suffered from severe economic constraints. The end of central planning economy brought about a region-wide hyperinflation in central Asia, and countries such as Kazakhstan, Kyrgyzstan, and Uzbekistan "faced challenges of nation- and institution-building in a context of

declining public revenues and new demands for public expenditure from those suffering from the [economic] shocks" (Heyneman & DeYoung, 2006, p. 132). Sectors of education and health, in particular, were profoundly affected and went through severe budget cuts, because despite the societal agreement on their long-term effects, they lacked strong support and lobbies for directing more resources.

Decrease in Salary

Shortly before and after the collapse of the Soviet regime, there was a severe cut in state funding on education, and this translated into delays and reductions in teacher salary in Russia (Bacon, 2014). According to Long and Long (1999), teachers in Russia experienced extreme poverty in the 1990s. Hundreds of thousands of teachers waited in line for a permanent public housing: a fifth of teachers in the urban areas resided in public dormitories, and a third of teachers in rural Russia lived in small rooms donated by the school community. There were frequent strikes by the teachers both in the regional and national level, and they not only called for an increase in salary but also demanded wages that had not been paid for months (Bacon, 2014; Long & Long, 1999).

Also, in Central Asia, teacher salaries declined precipitously after independence, and by the mid-2000s they were significantly below the national wage average (Silova, 2009). For example, in Kyrgyzstan, the official monthly salary for teachers ranged from 500 soms for new teachers to 800 for more experienced ones (DeYoung, Reeves, M., & Valyayeva, 2006). Since 40 soms equated to 1 USD in 2005, even fortunate teachers who were paid 800 earned about $20, or "about a third of what the government says is adequate to live on. These figures are substantially less than was the case during Soviet times" (DeYoung et al., 2006, p. 35) and

teachers claimed that their wages were extremely low and miserable as to be only ‘symbolic’. Some teachers, due to the financial struggle, engaged in selling exam grades in the secondary schools as well as in the universities (DeYoung et al., 2006).

In Tajikistan, another post-Soviet country in Central Asia, teachers shared the same financial difficulty and looked for additional jobs to make ends meet (Niyozov & Shamatov, 2010):

> An average [monthly] teacher salary in 2008 ranged between 150 and 200 Somonis while a sack of wheat flour costs between 100 and 150 Somonis. As a result, many teachers also have additional jobs outside school to supplement their income. It is not unusual for teachers to work at two different schools or have additional businesses (e.g. farms in rural area or small businesses in urban settings). (p. 157)

Decrease in Social Status

The prolonged decline of teachers’ salaries signaled a decline in their authority as well as their status in the society (Maslinsky & Ivaniushina, 2016; Silova, 2009). The collapse of the USSR hit teachers the hardest. While they seemed to be near the top of the social ladder in the communist system, in the new emerging market economy they were demoted to near the bottom of the hierarchy (Niyozov & Shamatov, 2010). This was a drastic transition for teachers, because during the socialist period they were portrayed as a group of intellectuals with a strong background in education. At the end of the Soviet era, for example, in Central Asia over 90% of teachers in the primary education had university degrees and roughly 95% of teachers in the subjects of math and science held degrees in their discipline and more than a few teachers in high school held PhDs (Sievers, 2013).

Moreover, teachers were identified as a powerful force, as the promoters of Soviet ideals (Niyozov & Shamatov, 2010). When the Soviet Union was established in 1922, human development policies gained momentum (Sievers, 2013):

> The Soviet Union demanded and mandated ambitious improvements in literacy and education in every single part of its territory . . . . The Soviet policymakers saw in education the future transcendence of divisive elements within Soviet society such as nationality and class. More precisely, they planned this transcendence to unfold through a combination of education and exposure to a common set of institutions and experiences. (p. 53)

The educational mission of the USSR played a pivotal role in Soviet society and teaching, therefore, was highly regarded and well protected by the state. Teachers enjoyed privileges such as "stable jobs, regular professional development opportunities, and a respected social status" (Silova, 2009, p. 368). With the success of the state campaign to eradicate illiteracy (*Likbez*, a Russian abbreviation for ***lik****vidatsiya* ***bez****gramotnosti*, which means elimination of illiteracy) in the 1920s throughout the 1930s (Sievers, 2013), "by the final decades of the Soviet Union, adult literacy was practically universal, school enrollment and completion rates for both boys and girls were very high, and further education opportunities were widely available within the region" (Heyneman & DeYoung, 2006, p. 132).

Since the dissolution of the Soviet Union, however, these achievements have been under stress due to a large economic contraction, and schools were largely undermined by equipment shortages, salary arrears, and a lack of teachers (Bacon, 2014). Literacy rates in the post-Soviet countries fell and the enrollment rates declined in all levels. For example, in Kazakhstan, school-

aged students exhibit 40% of functional illiteracy (Sievers, 2013) and the enrollment rate in students in the upper secondary dropped from 33% in 1991 to 26% in 1995 (Heyneman & DeYoung, 2006).

Availability of Alternative Professions

While the opening to a market-based economy in post-Soviet countries brought about the decline in state funding of education and the subsequent decline in teachers' economic and social status, the changes in the economic system in China informed and created a dissimilar environment for teachers in the 1980s. Teaching, in fact, has not been an attractive occupation in China even before the opening of the market economy, which is a stark contrast with that of the Soviet Union. Chinese teachers held comparatively low economic status, experienced political suspicion and persecution during the Cultural Revolution from 1966 to 1976, and did not enjoy high social respect, which is uncommon in the Confucian society (Leung & Hui, 2000; Paine, 1997). During the first year of the Cultural Revolution, for example, students were encouraged to evaluate and report on teachers' support for the revolution, and this anti-intellectualism during this period rendered teachers' role in the society to be ambiguous, discouraging, and frustrating (Lewin et al., 1994).

However, ten years before the Cultural Revolution in 1956, teachers did enjoy relatively high social status (Leung & Hui, 2000), since the campaign 'Hundred Flowers Movement' "encouraged the intellectuals, the majority of whom were teachers, to express their independence, imagination, and creativity" (Lewin et al., 1994, p. 97). Originally presented as an opportunity for intellectuals to engage in literary and scientific debate, the criticism unfortunately was not well taken by Mao Zedong and Chinese Community Party; thus, the

campaign was short-lived and followed by an anti-rightist purge that persecuted many intellectuals, including teachers (Leung & Hui, 2000; Lewin et al., 1994).

When Deng Xiaoping became the lead in China and orchestrated a large-scale economic reform, *Gǎigékāifàng* (改革開放, "Reform and Opening up") in 1978, the country went through a structural transition from a centrally planned to a market-oriented socialist economy. As a result, many teachers encountered an explosion of alternative occupations and "possibilities of greater earnings, more status, and fewer political vulnerabilities in other fields" (Paine, 1997, p. 68). Taking advantage of the labor market opening, many Chinese teachers migrated to "the commercial sector, such as in foreign joint venture companies, other private companies, hotels, and the travel industry, where the working conditions are better and the opportunities for professional advancement more numerous" (Sargent & Hannum, 2005, p. 173). Therefore, provinces like Guangdong that hosts special economic zones, Shenzhen, and coastal provinces that are more exposed to foreign trade compared to the interior provinces, experienced a high volume of teacher exodus, and the shortage of teachers in these areas was a growing concern (Leung & Hui, 2000).

3.3 Teacher Shortage

As a result, the aforementioned coastal areas in China had to offer attractive wage packages to recruit teachers from the interior provinces and re-attract teachers who had left for other occupations (Leung & Hui, 2000). In 1994, roughly 60% of the teaching force at the secondary level was made up of qualified teachers all across China, but the problem became more acute in the interior provinces, since a large number of teachers had left to the coast to fill their gap (Leung & Hui, 2000). The picture also varied across school subjects and the

representation of the qualified teachers was lower in STEM fields, which potentially indicates a graver problem of teacher recruitment and retention in these areas (Leung & Hui, 2000):

> [The national figure] in 1994 showed that the percentage of qualified teachers of mathematics, physics, and chemistry at senior secondary level was 10%, 7%, and 6% above average respectively. But the figure was 34%, 18%, and 35% lower than average for teachers of music, physical education, and fine arts respectively. (p. 191)

Before the opening of the market economy, however, the shortage of teachers was less an issue, due to manpower planning, which was a core part of the socialist planned economy in China. Under this system, the government assigned individual citizens to a particular occupation, based on projected societal needs and limited their potential career shifts.

Similarly, during the Soviet era, recruiting and retaining teachers, especially in the rural areas where the shortage was more pronounced compared to those in the urban schools (Niyozov & Shamatov, 2010; Silova, 2009), was not identified as a problem. “A precondition of obtaining a teacher education degree was accepting assignment wherever the education ministry sent you when your training was complete” (DeYoung et al., 2006, p. 83). However, in the post-Soviet era there were almost no compelling professional reasons for teachers to go into the schools in the countryside. Rural schools, compared to those in the city, lack equipment and are generally under resourced since parents have a difficulty supplementing the school cost. Moreover, rural schools are understaffed and the teachers working there tend to be less qualified, all of which indicates fewer opportunities for collaborative work, technical support, and professional development (DeYoung et al., 2006; Niyozov & Shamatov, 2010).

After independence, a lack of teachers in the classroom was widely felt across the post-Soviet countries in central Asia. For example, when Bakiyev ascended as president of Kyrgyzstan in 2005, he claimed that one of the key issues that the country needs to tackle is the shortage of teachers due to their low salary and poor working condition, which included lack of textbooks and deteriorating school infrastructure (DeYoung et al., 2006). He stated in 2005 that "the country lacks over 4000 teachers, 18% of today's teachers are senior citizens, and 320 schools need a major overhaul" (DeYoung et al., 2006, p. 22).

Issues in Teacher Retention (Teacher Exodus)

President Bakiyev then carried on referring to the problems of teacher attrition, especially noting on their departure to Kazakhstan and Russia, where they were paid three to four times more than they are in Kyrgyzstan (DeYoung et al., 2006). As a response, he suggested increasing by 50% teachers' salary by creating a budget from reorganizing the state administration and reducing the regional structures (DeYoung et al., 2006). Teachers in Kyrgyzstan, as noted earlier, earned between 500 soms ($12.5) to 800 soms ($20) a month; thus, it is still doubtful whether a 50% salary increase would be sufficient to attract and regain the departed teachers back into the country. In fact, in 2006, 66% of all schools were still short of the necessary number of teachers in Kyrgyzstan (Silova, 2009).

As much as the inter-societal brain drain was an issue among the countries in central Asia, domestically speaking, teachers' migration to better-paying jobs in other sectors of the society was also a growing concern (Heyneman & DeYoung, 2006; Silova, 2009)."This was especially the case with teachers of foreign languages and information and communication technology (ICT), who could make a better living by trading their jobs as public school teachers

for work as secretaries in private companies" (Silova, 2009, p. 358). For those teachers who stayed in schools, due to the unprecedented shortage, they had to cover subjects for which they were not trained, manage oversize classrooms, and teach groups of students with varying levels of age and competency (Silova, 2009).

Another interesting trend found in teacher turnover in the post-Soviet contexts is that it happened more frequently among the early- and mid-career teachers. According to Maslinsky and Ivaniushina (2016), the teacher attrition rate in 1990s after the collapse of the Soviet Union "had a lasting impact on the demography of Russian schoolteachers, forming what is known to be the effect of aging the teacher population" (p. 6). They noted the mean age of schoolteachers in Russia in 2013 was higher than the national age average. During the past ten years, however, there has been a growing proportion of young teachers due to the increase in salary; nonetheless, the adequacy of teachers' salary remains to be a public debate (Maslinsky & Ivaniushina, 2016).

Since most of the teacher attrition derived from the relative disadvantage of teachers' economic status, salary increase was a common measure applied and administered by the transitional governments. After Deng Xiaoping ascended as leader of China in 1978, as part of his modernization program he attempted to recover teachers' reputation by establishing national teachers' day (September 10) to honor and celebrate the work of teachers, and by awarding a 10% salary increase to the teachers in all levels of education (Leung & Hui, 2000). This minimal climb, however, was not comparable to the widening income gap between teachers and workers in occupations that are linked to foreign trade, the expanding private sector, and joint venture enterprises. Unless teachers took on moonlighting jobs to earn a supplementary source of income, it was difficult for most of them to maintain a modest living (Leung & Hui, 2000).

Between 1984 and 1987, about 130,000 teachers left the teaching force to fill the vacancies in private and foreign enterprises, a number that amounted to more than two-thirds of the newly trained teachers in the same period (Lewin et al., 1994). Teacher exodus seemed unstoppable in China. For instance, the national survey conducted by the State Education Commission (SEdC) in 1992 pointed to a continuous, potential outflow; only 36% teachers in Zhejiang, a coastal province that situates near Shanghai, indicated their interest in remaining in teaching (Leung & Hui, 2000).

Issues in Teacher Recruitment

In China, since the opening of a market economy in 1978, an explosion of diverse career opportunities occurred, and it largely undermined and discouraged the younger generation's interest in teaching. The graduates of secondary institutions in the 1980s generally became reluctant to pursuing a career in teaching and most teacher training institutions, regardless of their prestige and location (highly preferred if hosted in cities), found it difficult to recruit enough students (Leung & Hui, 2000).

Even Beijing Normal College, one of the leading colleges in Beijing and thus all across China, was not exempt from the recruitment difficulties and the quality of admitted students deteriorated substantially in the 1980s. Judging their quality by the percentage who achieved the minimum score on the university entrance exam, whereas a half of the entrants achieved this score in 1981, only 7% of admitted students scored above this bar in 1986. It is unfortunate because the limitation of academically competent applicants continuously forced the university to admit students who did not meet the minimum requirement (Lewin et al., 1994). Those who entered the institution also did not seem truly interested in pursuing a career in teaching. Among

the students of Beijing Normal College in 1984, only 13% indicated their interest in becoming teachers and in 1986, only a quarter of the graduates from the foreign language department entered teaching (Lewin et al., 1994).

Students' reluctance in pursuing a career in teaching was also evident in post-Soviet countries. In Kyrgyzstan, students attempted to find better-paying jobs and considered that "just about any job pays more and is better than teaching" (Niyozov & Shamatov, 2010, p. 157). Most graduates also preferred to stay in towns rather than teach in rural schools (Niyozov & Shamatov, 2010), and according to the Ministry of Education, they wanted to find ways to avoid the two-year compulsory service following their training (DeYoung et al., 2006).

3.4 Changes in Teacher Professionalism

After independence and the opening of the market economy in the post-Soviet countries, teachers, "who used to be in the avant-garde of the Soviet crusade against free trading and non-state-controlled commercial activities" (Niyozov & Shamatov, 2010, p. 154), had to pursue and engage in for-profit activities that previously were against their beliefs and social values. This indicated a high volume of teacher exodus to commercial and private sectors, and for those who remained, teachers had to seek relentlessly for avenues to make their ends meet. Some teachers embodied market principles, began to view their students as customers, and took advantage of the expansion of the 'hidden markets,' which included activities such as selling grades, "unofficially charging fees from parents, imposing private tutoring on students, or engaging in other shadow economic activities to boost their salaries" (Silova, 2009, pp. 368-369).

The market economy not only legitimized teachers' interest in income generating activities, but also introduced the logic of service provision to become prevalent in public

schools, and in turn, reconstructed teacher professionalism into one that is associated with an entrepreneurial identity of teachers (Silova, 2009). Their market-oriented approach to education, however, yielded "growing public criticism of the teaching profession, especially its reorientation from the egalitarian values strongly promoted by the Soviet government towards the profit-making interests that were increasingly acceptable in the post-Soviet education space" (Silova, 2009, p. 369).

This erosion of public perception of teachers and teaching as a profession also hinted at the devaluation of education in general. Students and parents paid less attention to schoolwork and learning, and the value of a university diploma was reduced, while the connections and opportunities that generated profits gained more popularity. Teachers, including those who had left and became successful in other fields (Niyozov & Shamatov, 2010), deeply lamented the overall situation that disengaged them from teaching and criticized how it impacted the professional identity of teachers. A former teacher who after departing the profession made 15 times more by working at an NGO in Tajikistan noted (Heyneman & DeYoung, 2006):

> There is a difference between leaving one's job and being forced to leave the job. . . . For many teachers, to work like slaves in Russia to sell soap and clothes, gum, and sunflower seeds in the bazaar is putting themselves down. It is humiliating for both those who have quit and those remained in teaching. (p. 50)

In the following chapter, I provide a historical overview of the education system in Cuba; how at times it experienced a periodic or chronic shortage of teachers. I also focus on the impact of the opening of the market economy on the teaching force since the 1990s.

Chapter 4: Teachers in Socialist and Transitional[10] Cuba

4.1 Introduction

The education in Cuba is one of the hallmarks from its revolution in 1959. The literacy rate on the island is 98% and their students easily outperform the counterparts in the neighboring countries (Carnoy et al., 2007). According to the international student assessment that Cuba participated in 1998,[11] the third and fourth grade students in Cuba scored two standard deviations higher than their counterparts from Argentina, Chile, Brazil, Venezuela, etc. in both subjects of reading and mathematics (LLECE, 1998). Similar results were found in the following international student assessment in 2006, where the third and sixth grade students scored more or less one standard deviation higher than the regional average in reading and math (LLECE, 2008). Moreover, unlike its fellow countries where there is a significant rural and urban divide in students' achievement, in Cuba, rural students scored slightly less than urban students and the difference was minimal compared to the other countries (e.g. third grade reading - 7 points (Cuba) vs. 26 points (Honduras) vs. 28 points (Colombia)) (LLECE, 1998).

The reason for Cuba's academic success mostly derives from the government's exceptional interest and investment on education, but the government's free health care system also is a factor. Numerically speaking, when the government expenditure on education as a

[10] Transition economy refers to the countries that are transforming their centrally planned economies into market economies with common ingredients such as privatization (transferring the ownership of state firms to private hands), liberalization (allowing prices to be determined in free market), and institutional reforms (redefining the role of state and introducing appropriate competition policies) (Estrin, Hanousek, Kocenda, & Svejnar, 2009; IMF, 2000; Trivić & Petković, 2015). The economic measures employed in Cuba since the collapse of the Soviet Union reflected these features and resembled them even more after Raul Castro became the President in 2008 (Font & Jancsics, 2016). Therefore, I labeled the time during Special Period in the 1990s and onward, Transitional Cuba.

[11] Latin American Laboratory of Evaluation of Quality of Education (*Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación, LLECE*).

percentage of GDP is compared, Cuba in 2010 invested more than the double the world average or even what the high income countries[12] did (12.84% (Cuba) vs. 4.58% (the world average) vs. 5.41% (high income countries)).[13] In addition, the government is heavily involved and centrally managing what goes on in the classroom and mandates the teachers to practice a child-centered approach which is highly associated with the quality education (Carnoy et al., 2007). Indeed, in such context where the government imposes a tight quality control over education, there is a weak influence of socioeconomic background on students' academic achievement; in Cuba, regardless of the years of education their parents received, almost all Cuban students finish their schooling on time (LLECE, 1998).

The highly competent teachers in Cuba, who are also the beneficiaries of government's heavy interest on education, furthermore, play into students' academic success. They are regarded as professionals and enjoy a relatively high social status. Not only are they paid generally on par with other well paid professionals but they go through long years[14] of a systematic, demanding, and competitive training process that is as rigorous as that for persons in other occupations such as lawyers and doctors, who are often referred to be monetarily rewarding and well respected (Bruns & Luque, 2014; Gasperini, 2000).

This chapter centers on the dynamic between education and teachers in Cuba and how, at times, the education system experienced a periodic or chronic shortage of teachers. It intends to provide a historical overview of education and teachers and analyzes how the education system

[12]Based on the World Bank's Country and Lending Groups, the countries with a Gross National Income (GNI) per capita of $12,236 or more are classified as High Income economies. Retrieved November 1, 2017, from https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups
[13]Retrieved November 1, 2017, from https://data.worldbank.org/indicator/SE.XPD.TOTL.GD.ZS?locations=CU
[14]After the reopening of pedagogical school in 2010, many teachers at the preschool, primary, and lower secondary level start their classroom roles after only an upper secondary level of pedagogical school training, though the vast majority continue to pursue university level pedagogical degrees.

as well as the specific social context shaped and yielded relevant teacher policies. To provide a structure to this chronological review, I have utilized some of the monumental events throughout Cuban history as anchor points to guide the narrative. The following lists them in a chronological order: Cuba under the Batista regime, from Cuban Revolution to the early revolutionary days, from the 1970s to the 1980s, the demise of Soviet Union and the "Special Period" of the 1990s, and the 2000s to more current days.

4.2 Teachers in Pre-revolutionary Cuba

The education system of pre-revolutionary Cuba was markedly different from that of the contemporary Cuba. Unlike the highly egalitarian mass education system that Cuba has now, it used to symbolize inequality. It was unequal in a sense that the quality education was somewhat available yet enjoyed by and reserved for the few. In 1955, only 51% of Cuban children were enrolled in primary school and this number was less than in 1925 (63%, Carnoy & Werthein, 1980), which indicated the limitation to the educational access even at the primary level (Lutjens, 2000). However, the average literacy rate for Cubans was relatively high, 76% in 1953, only surpassed by the large Latin American economies such as Argentina (87%), Chile (81%) and Costa Rica (79%) (Breidlid, 2007). What must be noted about inequality of education in pre-revolutionary Cuba is the disparity between rural and urban areas. That is, education did not reach the poor and marginalized, especially those in rural areas, due largely to high school fees and pervasive corruption in the education system (Breidlid, 2007). For example, in the capital city, Havana, while only 1 out of 10 was recorded to be illiterate (Goldstein, 2012), in other areas like Holguin, a professor from the faculty of education in the university in Holguin noted that more than a third of the population were illiterate before the revolution.

The drastic urban and rural divide in terms of educational opportunity was what Cuban teachers at the time had to face. The country lacked attention to providing quality public education, thus teachers taught in deteriorated classrooms without any support in teaching materials, and their salaries were rarely paid on time (Lutjens, 2000). Despite this hardship and the shortage of teachers, the country remained unresponsive. Thousands of teachers were unemployed and failed to be deployed due to the low government budget as well as the weak coverage plan (Lutjens, 2000). The interview that Kozol (1978) did with a former teacher who taught under the regime of Batista, the U.S.-backed dictator who ruled Cuba prior to the revolution (1952-1959), reflects well her experience teaching in the rural area with lack of support for education:

> I already knew of poverty. . . I had been a teacher in a fishing village and had seen the terrible suffering before. I used to have 100 children in one classroom when I taught first grade. They had to sit on the floor; we had no desks or chairs. I used to follow a thin path along the swampy section twice each day, first to get to school, then to get back. That was under Batista. Everybody was corrupt. I brought charges against the chairman of the local school board. He had taken the money [that had been allocated] for the children's breakfast food. (p. 66)

4.3 Teachers in Socialist Cuba

From the Cuban Revolution to the 1960s

The same teacher then carries on and compares her experience before and after the 1959 revolution (Kozol, 1978):

> After the revolution, as one of the People's Teachers[,] I used to read together with my class, then ask one of the students to attempt to read alone. It was not one-to-one, but it was six or seven or eight [students] . . . . We had been trained to do our work by people who had been a part of the initial team that had composed the primer. (p. 66)

I believe her words encapsulated well the stark contrast in the educational environment as well as the teaching and learning experiences that the revolution brought about to students and teachers in Cuba. With the revolution in 1959, the total number of teachers was increased, and they became more available in rural schools[15]. Students received better quality education offered by the teachers who were trained by experts, which altogether was the quality of education, exclusive to the wealthy urban Cubans before the revolution (Kozol, 1978).

The education system of contemporary Cuba, which is characterized by high quality and egalitarian public education without discrimination based on race, gender, origin, or socioeconomic status, was first implemented[16] by the revolutionary leaders in the early 1960s. In order to tackle unequal distribution of wealth and social services, education and health were brought to the fore as top priorities of the society. Especially with regard to education, the year 1961 was proclaimed to be 'The Year of Education', aimed to eradicate illiteracy throughout the island (Breidlid, 2007; Ginsburg, Belalcazar, Popa, & Pacheco, 2010). "The literacy campaign mobilized more than 200,000 facilitators, both young and old, and the campaign crossed the rural–urban divide in the sense that the countryside was particularly targeted" (Breidlid, 2007, p. 621). By the end of the year, this nationwide campaign had managed to produce more than

[15]For example, there were 17,000 primary school teachers in Cuba in 1958, 5,000 of which were teaching in rural schools. The total number was increased to 24,000 in 1959, and more than 10,000 teachers were teaching in rural schools (ONE, 2009),

[16]The overarching educational philosophy of Cuba has its root in the idea of Jose Marti who articulated the role of education in his maxim in 1884, 'To be educated is the only way to be free' (Ginsburg & Garcia Batista, 2019)

707,200 new literates in the island (Supko, 1998). This reduced the illiteracy rate to 3.9% (c.f. 24% in 1953), which was incomparably lower than any other country in Latin America (Supko, 1998).

In addition, the new leadership believed that schools were critical to the preparation of the youth in the new socialist society and greatly expanded the first two levels of the formal school system (Ginsburg et al., 2010). The number of primary schools, for example, grew more than fivefold between 1959 and 1965 (i.e., the first five years under the revolutionary government); there were 7,700 primary schools in the last year under Batista regime (i.e. 1958), and 41,600 in 1965 (ONE, 2009). The expansion of formal schooling was a part of transformation of Cuban society which entailed Che Guevara's vision on creating the 'New Socialist Man' driven by moral and idealistic principles, rather than material incentives (Breidlid, 2007; Lutjens, 2000; Ginsburg & Garcia Batista, 2019). Sobe and Timberlake (2010) explained the new person or citizen of Cuba as follows:

> This individual was to be, among other things, driven by moral imperatives rather than by promises of material rewards, and was to exhibit a desire to function as part of a community of equals rather than as an individual. (pp. 355-356)

With education elevated as the spearhead of the Cuban revolution, teachers in the early revolutionary Cuba played a symbolic and sacred role. Fidel Castro's view on education and the role that teachers play is mirrored in his famous speech, 'History Will Absolve Me,' made during his trial for the unsuccessful 1953 attack on Moncada Barracks and six years before the triumph of the Revolution.

> The happiest country is the one which has best educated its sons, both in the instruction of thought and the direction of their feelings….The soul of education is the teacher…no one

> is more dedicated than the Cuban teacher. Who among us has not learned his ABCs in the little public schoolhouse. It is time we stop paying pittances to these young men and women who are entrusted the sacred task of teaching our youth. (quoted in Breidlid, 2007, p. 621)

The expansion of mass formal schooling, coupled with the new educational goal of nurturing the 'New Socialist Man', called for thousands of additional teachers in Cuba. This exponential growth in demand for teachers was burdensome for the revolutionary government because it inherited an acute shortage, partly from the previous government and partly from the exodus of many teachers and other middle class Cubans after the Revolution.[17] And the shortage was relatively more concentrated in rural areas compared to urban areas. Moreover, teachers who were already in-service were either not professionally qualified or needed to be retrained with the political ideology and socialist values that aligned with the new revolutionary government (Griffiths, 1998; Ginsburg et al., 2010).

In response to these needs, in June 1961, the government opened new training schools for the primary school teachers (*Escuelas de Formación de Maestros Primarios*) and provided both pre-service and in-service trainings (García Ramis, 2004). The entry requirement was a minimum of six years of education in the primary school and the program lasted for five years (Carnoy & Werthein, 1983; Ginsburg et al., 2010). The basic functions of the training schools were as follows: 1) Emergency training for the teachers without a license to meet their qualification; 2) Pre-service training for the students ranging from the graduates of primary

[17] According to Cogan (1978), more than half of best-trained teachers in Cuba left the country after the revolutionary government took over.

school to high school; 3) Life-long training for the teachers to continue developing their cultural, scientific and psycho-pedagogical level (García Ramis, 2004).

The drastic improvements in education that Cuban teachers experienced throughout the 1960s were clearly documented in the numerous data published by the National Office of Statistics in Cuba (*Oficina Nacional de Estadísticas, ONE*). In celebration of the 50th anniversary of the triumph of the revolution, ONE released data on diverse aspects of Cuban, education spanning from the year of 1958 to 2008. First of all, the installation of the new teacher training schools was associated with an increase in the total number of teacher educators by more than threefold, from a mere 400 in 1961 to 1,500 in 1962 (ONE, 2009). With regard to the teaching force in general, over the course of a decade of the 1960s, the total number increased more than fivefold, from 23,000 to 120,000 (Lutjens, 2000; ONE, 2009).

When this was broken down by the teaching location (urban vs. rural schools), for example at the primary level, on the eve of the revolution in 1958, only 30% of entire teaching population were teaching in rural Cuba (5,300) and this number almost doubled in a year (10,300) after the triumph of revolution in 1959. Over the two-year period the teaching population at the primary level more than doubled – from 17,000 prior to the revolution to 30,000 in 1960.

What must be noted about this short stretch of time is that the increase took place heavily in the rural areas. In fact, "teachers trained to work in rural areas were typified by the government as an elite group serving the revolution" (Carnoy & Werthein, 1983, p. 223). Thus, becoming a teacher in the rural area was not a second-class job; rather it symbolized strong professionalism and an opportunity for advancement in their career (Carnoy & Werthein, 1983). By 1960 the disparity between the number of teaching personnel in urban and rural areas was

dramatically reduced; for instance, at the primary level in 1960 teachers in urban areas were 15,800 (up from 12,000 in 1958) and those in the rural schools were 14,100 (up from 5,300 in 1958). This reflects the intention of the revolutionary leaders that catered more resources to the rural schools, which was to balance their educational opportunities with those in the urban schools and, hopefully, eradicate the inequality which largely derived from the deprived educational environment in rural Cuba.

With the expansion of formal schooling at the first two levels of education, the number of teachers at the secondary level also steadily climbed from 4,500 in 1958 to 15,900 in 1968. In between the academic year of 1968 and 1969, the number of secondary teachers experienced a dramatic increase from 15,900 to 19,600, which overlapped with the time when the first graduates of secondary teacher preparation universities were deployed. In 1964, three universities opened up, for the first time in the Cuban history,[18] to specifically prepare teachers in the secondary level (García Ramis, 2004).

Another aspect that must be noted about the secondary teaching population is that no data are available for the teachers in the rural area in the 1960s. The earliest available data are for the year 1971 with 740 teachers. Given that the year 1971 coincides with the opening of a teacher training program in the secondary level – Manuel Ascunce Domenech Teaching Detachment (*Destacamento Pedagógico Manuel Ascunce Domenech, DPMAD)* – which corresponded to the growing need of secondary teachers, it can be assumed that a great deficiency or almost an absence of secondary teachers was experienced in rural schools.[19]

[18] Before the revolution, formal training was limited to the primary school teachers through a tertiary level institution called Normal Schools (Escuelas Normales) (IESALC, 2003).
[19]Carnoy and Werthein (1983) noted that "secondary schools in rural areas were practically non-existent" (p. 203).

From the 1970s to the 1980s

At the start of the 1970s, Cuba undertook a second round of educational reform centering on the improvements and achievements, building on the reforms in the previous decade (Lutjens, 2000). From 1970 to the demise of the Socialist bloc in the late 1980s, this period was labeled as *Perfeccionamiento* and the country focused on building upon and improving its system and addressing the emerging problems. In education, the follow-up policies signified tapping into quality measures in the classroom; whereas in the 1960s, the emphasis was to grant learning opportunities for all, under the spirit of *Perfeccionamiento,* the focus shifted to addressing the issue of retention and progression. It delved into the students' performance and learning outcomes, addressed the persistent issue of rural and urban divide in terms of providing quality education, and prepared more teachers for secondary schools, which came as a positive consequence from the earlier expansion (Lutjens, 2000).

One of the iconic programs introduced in the 1970s was "Schools in the Countryside" (*Escuelas en el Campo*) based on the Marxist principle of combining work and study (Cogan, 1978; Ginsburg & Garcia Batista, 2019). This education program was closely aligned with the concept of New Socialist Man and had the purpose of orienting youth to the socialist value. Che Guevara noted:

> The combination of study and work … is the best type of education for the youth who are preparing for communism: the type of education where work loses the kind of obsession it has in the capitalist world to become a rewarding social duty… (quoted in Ginsburg & Garcia Batista, 2019, p. 5)

As part of the program, students travelled from urban areas to live, study, and work in the countryside. They were divided in groups and interchanged shifts of study and work. Many schools were located in the Isle of Youth and a large percentage of students came from Havana (Cogan, 1978). Breidlid (2007) argued that "the idea of collecting nearly all secondary school students in boarding schools away from their parents has social and ideological implications" (p. 626). This isolated, yet communal setting allowed for students to be relatively undisturbed by other influences and concentrate on developing a sense of solidarity and communal responsibility (Cogan, 1978). Additional results included students' improved academic performance as well as retention to progress in school (Carnoy, 1990). Indeed, finding qualified teachers who could manage and operate this unique program was difficult, and this called for the establishment of DPMAD (Cogan, 1978).

The teacher shortage at the secondary level, particularly in rural schools, led to the creation of DPMAD in 1971 (García Ramis, 2004; Lutjens, 2000; OEI, 2003). As a result, over the first few years in the 1970s the number of rural teachers in the secondary level grew exponentially, more than tenfold from 700 in 1971 to 11,000 in 1975 (ONE, 2009). With regard to the total secondary teaching population, during the 1970s, more than 1,500 training centers were built (Lutjens, 2000) and the total teaching population grew fourfold, from 22,000 in 1971 to 88,000 in 1980 (ONE, 2009). It is evident that the resources were catered to expanding secondary teachers, because the increase at the primary level slowed down during the same time period, increasing by less than 50% from 65,000 to 84,000 (ONE, 2009). In fact, 1980 marks the first year in the Cuban history that the teaching population at the secondary level outnumbered

that at the primary level, which persisted through the mid-1990s, when Cuba entered the era of teacher's exodus to tourism-related employment (ONE, 2009).

To elaborate further on the DPMAD program, Castro proposed to admit graduates of secondary school (those who completed the 10th grade), train them in pre-universities, and deploy them to rural areas to teach in secondary schools under the supervision of experienced on-site mentors. At the same time, they were enrolled in the local tertiary level pedagogical institutes (ISPs) (Castro, as cited in Blum, 2011; Vidal Padrón, 2012). While at the pre-university for two years the paraprofessionals did not practice teaching (Castro, 1977) but later, when transferred to ISPs, they attend for 8 semesters to work towards their teaching license, combining practice with study. Courses leading to a licentiate's degree included subjects organized in the following cycles (Economic Commission for Latin America, 1978):

- Cycle of Marxist-Leninist philosophy
- Cycle of pedagogical material
- Cycle of specific subject matter relating to the teaching specialty

In addition (Economic Commission for Latin America, 1978):

> all students have courses in Spanish language and literature, art education, and physical education. . . . Students' practice teaching in their 8th semester, after having passed all previous courses. The evaluation system includes compulsory state examinations on Marxist-Leninist philosophy, general pedagogy, as well as the language didactics. (pp. 6-7)

In 1976, a new law General Reform of Higher Education in Cuba *(Ley de Reforma General de la Educación Superior Cubana*) was enacted. Under this law, all teacher training

institutions in Cuba went through a massive structural reform which entailed an integration under one system of tertiary level pedagogical institute (ISPs – *Institutos Superiores Pedagógicos*) (García Ramis, 2004; OEI, 2003; Varela Hernández, 1995). To obtain a license for primary and secondary school teaching, students were required to complete a 5-6 year program in one of the 15 ISPs located in each province of Cuba (Ministerio de Educación, 1994; Díaz Fuentes, 1997; Gasperini, 2000; Gómez Castanedo & Giacchino-Baker, 2001). ISPs provided both pre-service (5-year full time) and in-service (6-year part time) training. Furthermore, as a result of the reform, the bar was raised and graduates of the 12th grade were eligible to apply. Part of the entry requirement also included math and Spanish exams along with additional aptitude tests; additionally, applicants were to interview with the teacher educators to assess their potential, commitment and motivation to teaching (Varela Hernández, 1995). Each year, the number of available places in ISPs was determined by the Ministry of Education, based on the demand for teachers predicted for the year of graduation. After the comprehensive review of the test and interview results along with students' performance at the secondary level, a group of students with the highest scores was admitted to the ISPs (Varela Hernández, 1995).

4.4 Teachers in Transitional Cuba

From the 1990s and the Demise of Soviet Union

At the turn of the 1990s, ISPs released and introduced a new curriculum, Plan of Studies C, for the class of 1995; the most notable change included the expansion of the length of the practicum (García Ramis, 2004). Under the prior curriculum, Plan of Studies B, which lasted from 1982 to 1989, student teachers were sent to local schools for 8 weeks in the senior year. As part of the Plan of Studies C, introduced in the 1990s, field practica began in the first year and

also took place in every year of students' program (García Ramis, 2004). This extensive teaching experience takes up at least half of the 5-6 year curriculum and in the 3rd and 4th year, students spend half of their time in the practicum schools (Varela Hernández, 1995). In the last year, students conduct a supervised teaching and return to ISPs for a weekly lecture or seminar (Ministerio de Educación, 1994; Gómez Castanedo & Giacchino-Baker, 2001; Varela Hernández, 1995). This practicum, along with the research and academic component, constitutes the triad of ISP principles (García Ramis, 2004; OEI, 2003; Varela Hernández, 1995), which provided a fundamental structure to the evolution of its curricula from Plan of Studies A in 1976 to Plan of Studies E, effective from 2016.

As part of their academic work, students are required to take 'Educational Development,' 'History of Education,' 'Teacher and Society,' 'Adolescent Development,' and 'Educational Psychology,' regardless of their 21 different areas of specialization in ISPs (Gómez Castanedo & Giacchino-Baker, 2001). The research component plays a unique role linking the learning from the academic courses and practica. Students are required not only to acknowledge and understand the educational problems but also to address and tackle them by engaging in an in-depth research analysis as a culminating project for the graduation. In order for students to graduate with a bachelor's degree in Education, they must submit at least two research projects and defend one of them at the end of last year in the program (Gómez Castanedo & Giacchino-Baker, 2001). In fact, the emphasis on educational research was not limited to the student teachers in ISPs. Throughout the 1990s, the Ministry of Education (1994) was widely involved with strengthening the research skills of teachers in the classroom – such as selecting the topic,

problem-solving, analyzing, etc. – and as part of adding quality measures to the teaching force, they actively communicated and distributed best practices of teachers.

According to García Ramis (2004), in his report on "the Situation of Pre-service and In-service Teacher Training in Cuba," during the latter half of the 1980s, the number of graduates from ISP exceeded 10,000 and in 1991, it reached 20,000. During the first half of the 1990s however, this number halved (10,600) and in 2000, it dropped almost to just over a quarter (5,700) (ONE, as cited in García Ramis, 2004). Not only the number of graduates but also that of the enrollment in ISPs signaled at the potential problem of teacher recruitment in the 1990s. During the same time period, the number of students who entered ISP also declined; 48,000 students first enrolled in the ISPs in 1994 and this number dropped to 38,000 in 1996, again to 35,000 in 1998 (ONE, as cited in García Ramis, 2004). When looking at the graduation rate, the number is even more devastating; for the students who enrolled in 1994 and 1995, it was only 12% and 14%, respectively, meaning that only one out of 7 or 8 students graduated from ISP on time.

Special Period

What happened in ISPs in the 1990s? Was the program too demanding for students to graduate on time? Also, what accounts for the reduced number in the enrollment? García Ramis (2004), who presented the data on the number of entrance and graduation of ISPs, argued that the decline in both areas can be attributed to the economic crisis that Cuba encountered due to the collapse of Socialist camp in the late 1980s and, most significantly, that of the Soviet Union in 1991. Scholars on Cuban education (Erikson, Lord, & Wolf, 2004; García Ramis, 2004; Gasperini, 2000; Goldstein, 2012; Lutjens, 2007) unanimously point to the economic crisis in the early 1990s as the tipping point when teachers fled to tourism-related employment for better

paying jobs, and teaching began to lose its attraction with the younger generation, manifested in the decline in both the numbers of enrollment and graduation.

To elaborate further on the economic crisis in the 1990s, the loss of its strongest ally[20] alone locked Cuba into a severe economic depression, since 85% of Cuba's trade was with the USSR, not to mention the dependence on its fuel mounting up to 60% of entire consumption on the island (Lutjens, 2000). As a result, "Cuba's transportation networks and the heavily petroleum dependent agriculture ground to halt" (Sobe & Timberlake, 2010, p. 356). Coupled with this economic downturn, came along ever-strengthening US embargo (or blockade), namely the Cuban Democracy Act in 1992 and the Helms-Burton Act in 1996, which prevented and penalized foreign companies trading with Cuba.

As a response, Castro directed various economic reforms that were designed to address Cuba's excruciating economic constraints (Moreno, Pérez Rojas, Ginsburg, & McGlynn, 1997). Functioning upon the official name of 'Special Period in Peace Time' *(Período Especial en Tiempo de Paz)*, the new economic policies included: opening up certain sectors of national industry to foreign investments, expanding the tourism industry, legalizing private employment in150 occupations, liberating the circulation of US dollars, creating farmers market, and developing agriculture cooperatives (Moreno et al., 1997).

[20]The relationship between the USSR and Cuba was all encompassing affecting various aspects of life in both countries. "A vast number of joint collaboration projects had been created in areas such as science and technology, and sport and education…[By the 1980s,] some 8,000 Cubans studied in the Soviet Union each year and 140 educational centers had been completed on the island with Soviet help" (Bain, 2005, p. 774).

Multiple decades of intensive educational exchange had yielded interesting resemblance between the two. Some argue that the pedagogical methods used in Cuba reflect those from the USSR. For instance, many of the subjects in social science such as history, psychology, sociology and political economy had adopted the thoughts from the Soviet Union. Fernando Rojas, the vice minister of Culture in Cuba, raised this point in his interview with BBC Mundo. He noted that historical narratives that are heavily centered on the labor force and the productive relationship inherited their style from the Soviet education (cited in Heredero, 2011).

Changes in economy signify changes in the labor market. The aforementioned reforms brought about different landscape in the labor market, and the teaching force, traditionally made up of the most competent workers/citizens in Cuba, was affected. Teacher's monthly salary,[21] which was 350 in Cuban pesos or about 13.50 in USD, despite being almost equivalent to other respected, public/state sector professionals such as doctors and lawyers, was simply not enough to keep teachers or potential teachers from flocking to the other sectors (Lutjens, 2000). They began to shift their interest to tourism where they could enjoy direct access to foreign currency, which compared to their local Cuban peso, 1 USD (or 1 CUC, Cuban Convertible Peso) amounted to 24-25 times more.[22]

Education being the top priority in Cuba, even under the severe economic constraints, the Cuban government never ceased to increase the public investment on education.[23] For instance in 1999, teachers' salary was increased by 30%, to the equivalent of approximately US$20 a month, with a hope to prevent ever expanding exodus amongst teachers (Sobe & Timberlake, 2010); however, the influx of dollars in tourism-related activities continued to drain away teachers from the classrooms. Throughout the 1990s teacher annual attrition rate amounted to 4-8% (Gasperini,

[21]The monthly salary of teachers was generally determined by the following components; the level of professional qualification, the type of educational institution that they work in and the type of work they are in charge of, and the result of their professional evaluation (GarcíaRamis, 2004). In the 1990s, entry-level teachers who were recent graduates of pedagogical science university received between 280 and 330 Cuban pesos per month and depending on their performance, it reached up to 425 Cuban pesos (GarcíaRamis, 2004). In addition to the material benefits, other incentives included; professional trainings on using technology in the classroom, opportunities for free graduate studies, participation and presentation in domestic and international conferences, and 15 days of annual paid leave in addition to the official summer/winter vacation (GarcíaRamis, 2004).

[22]As an example, based on salary and, more importantly, tips, a housekeeper in a hotel might earn double or triple a teacher's salary (Carnoy, 2007, p. 32).

[23]Expenditure on education as a percentage of GDP in Cuba was 6.7% (1989), 8.5% (1990), 10.4% (1994), and 10% (1996), recognizing that Cuba's GDP also decreased and then increased during the 1990s.

2000) and henceforth, Cuba has never recuperated from this teacher attrition rate (González, 2013).

From the 2000s to the Present

During the latter half of the 1990s, Cuban economy slowly recovered from the economic loss generated by the demise of Soviet Union. The GDP of Cuba, which dropped to US$22 billion, regained its original number of US$29 billion by 1995 (World DataBank). Moreover, its strong ties with Venezuela and active investment by China alleviated the government's main concern of securing oil imports and gave Cubans confidence with the continuous economic recovery (Anderson, 2006; Font, 2008; Mesa-Lago & Pérez-López, 2013). Witnessing the ameliorating economic situation, Cuban authorities quickly began to undo the liberalizing measures applied during the Special Period and criticized them for creating social problems centered on inequality.

Functioning upon Fidel Castro's campaign of "Battle of Ideas" (1999-2006), countermeasures in economic fronts focused on limiting the access to hard currency which was considered the cause of growing inequality on the island. Ludlam (2012) explains that,

> With most ordinary national peso (CUP) salaries insufficient to live on decently, a fragmented labor market contains an aristocracy of labor characterized not by high levels of skill but by access to hard currency, convertible Cuban pesos (CUC) acquired through pay bonuses in key sectors, or tips in the tourism sector. And in well-stocked hard currency shops, Cuba's *nuevos ricos* (new rich) can be encountered who no longer work at all, having access to unearned CUC income from remittances or corruption. (p. 45)

As a response, the government restricted circulating dollars by assessing a 10% penalty

and shut down small-scale entrepreneurs, 2000 private street stalls and other businesses by 2005 (Font, 2008). At the same time, the number of licensed entrepreneurs and foreign businesses halved and left Cuba.

On social and educational fronts, the government reinforced revolutionary values and socialist norms, as much of them were lost during the Special Period (Breidlid, 2007; Font, 2008; Ginsburg & Garcia Batista, 2019; Kapcia, 2005; Ludlam, 2012). Over a decade of individualist resolution of daily problems as well as the fracture in the link between normal work and decent income severely damaged and discouraged the commitment to the revolution (Breidlid, 2007; Ludlam, 2012). Fidel Castro noted the emphasis of Battle of Ideas being the reorientation toward socialist ideology: "We must continue to pulverize the lies that are told against us…. This is the ideological battle, *everything* is the Battle of Ideas" (quoted in Anderson, 2006, p. 44).

The main aspect of the campaign included mobilizing youth to take the lead, as the lack of revolutionary spirit as well as the high-level of unemployment[24] among them were considered a growing concern. Fidel Castro and other leaders realized that by capitalizing on youth as an ideological weapon, the country could not only win them back to the ideas of the revolution but also tackle the social problem caused by their disengagement (Breidlid, 2007; Kapcia, 2005). The political objectives of programs created as part of Battle of Ideas were largely two-fold: "to give a potentially lost generation a stake in the system and guaranteed well-paid employment in socially useful tasks" (Kapcia, 2005, p. 401).

In December 1999, the Battle of Ideas was officially launched, and shortly after it was followed by a new educational revolution (Ginsburg & Garcia Batista, 2019). As part of the

[24]The overall unemployment rate in Cuba in 1995 was recorded to be 8.3% and it was reduced to 4.1% in 2005. Current unemployment rate as of 2018 is 2.3% in Cuba, according to World DataBank.

Third Educational Revolution (2001-2009), the government spending on education as a percentage of GDP doubled from 7% at the beginning of Battle of Ideas in 1999, to 14% in 2008 in the last year of Fidel Castro's presidency (World DataBank). During this time, the network of emergency training schools (*Escuelas Emergentes*), upper-secondary level institutions, were established to respond to the immediate needs of the society, covering five specific areas of social work, primary teaching, nursing, cultural education, and instruction of information technology. In term of primary teaching, *emergente* primary school teachers were prepared "to reduce the class size to a promised [20] to a class and to address staff shortages caused by the exodus from the public sector to the dollar economy" (Kapcia, 2005, p. 401).

Moreover, access to higher education was widely expanded through offering university courses through TV channels (University for All, *Universidad para Todos*) and extending higher education centers to all municipalities (*municipios*) where courses could be provided in flexible hours by the university staff (Breidlid, 2007; Font, 2008; Kapcia, 2005). As a result, the gross tertiary enrollment rate[25] in Cuba exploded from 22% in 2000 to more than 100%, in 2007 (World DataBank[26]). The dramatic expansion of tertiary education played an ideological role similar to that in the 1960s of primary education and of secondary education in the 1970s (Quintero López, 2012). It embodied the ethos of Education for All, central to the socialist development in transitional Cuba (Kapcia, 2005).

Another essential element in the Third Educational Revolution was the introduction of

[25]According to UNESCO Institute for Statistics which WorldDataBank drew its data from, the school enrollment, tertiary (% gross) indicates "the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to the level of tertiary education. Tertiary education, whether or not to an advanced research qualification, normally requires, as a minimum condition of admission, the successful completion of education at the secondary level."

[26] https://data.worldbank.org/indicator/SE.TER.ENRR?locations=CU

comprehensive junior secondary teacher, *Profesor General Integral* (PGI), who was expected to teach all subjects (except for a few specialized subjects such as English and Physical Education), in contrast to the earlier system where teachers only taught their specialized subject (Breidlid, 2007; Ginsburg & Garcia Batista, 2019; Martín Sabina, Corona González, & Hickling-Hudson, 2012). The student teachers of PGI were admitted after finishing the 12th grade upper secondary school and then spent their first year in the program at the main campus of their university. From second to the fifth year, they combined work and study by teaching full time in a junior secondary school (7-9th grade) and taking university courses in the municipalities once a week where assistant professors guide them in their studies. The focus of the PGI program was to provide general knowledge and interdisciplinary teaching through technology such as TV, video, and computers. Moreover, attention was paid "to the social aspect of learning, where the idea of inclusion plays an important role in the rhetoric around the new reform" (Breidlid, 2007, p. 624), and this was facilitated by keeping a small student-teacher ratio, a maximum of 15 students per teacher.

The PGI program has largely been described as dramatic (Breidlid, 2007) and controversial[27] (Martín Sabina et al., 2012), and many disagreed with this teacher intervention based on two factors. One was the age of the PGIs. There were often cases where a student teacher at the age of 19 was teaching a group of 17-year-olds. Cuban educators as well as parents expressed deep skepticism toward these young teachers (Breidlid, 2007). Another factor had to do with the teacher's knowledge. There were questions about not only teacher's professional knowledge after only a year of training in the university (vs. five years in the traditional track),

[27] http://www.juventudrebelde.cu/cuba/2013-06-07/nunca-quise-ser-un-graduado-mediocre/imprimir

but also life experiences and values, which were the emphasis and the motivation for the introduction of PGI (Breidlid, 2007). As a result, the program was modified and evolved into a teacher being in charge of a group of related subjects (e.g. mathematics and sciences, humanities, arts) (Martín Sabina, et al., 2012), and later the program was discontinued (Backer, 2011; Buchberger, 2013).

Cuba under Raul Castro

Strategies employed as part of Battle of Ideas began to wind down as Fidel Castro fell severely ill in 2006 and ceded power to his brother Raul Castro as an acting president. Even before he was elected as the next president in 2008, Raul Castro was known to be in favor of reforms (Font, 2008): he agreed to the ideas by "the reformists who were principally academics (economists and other social scientists) and technicians … [and] saw market reforms … [as opportunities to] check the state monopoly in certain areas, promote competition, and increase efficiency, create productive employment opportunities, and spur economic growth" (Mesa-Lago & Pérez-López, 2013, pp. 14-15).

During his speech on July 26, 2007, Raul Castro acknowledged that salaries are insufficient to meet basic needs and announced that reforms are carefully underway (Font, 2008). There he emphasized efficiency as a new approach for the country to solve complex problems. He noted:

> what has been achieved in recent years … [was possible] with a clear conscience about our problems, our inefficiencies, our errors and our bureaucratic and/or slack attitudes…. *Efficiency* [emphasis added] largely depends on perseverance and good organization, especially of systematic controls and discipline, and in particular on where we have

succeeded in incorporating the masses to the struggle for efficiency. [28]

Translating the concept of efficiency, the Guidelines of the Socioeconomic Policy of the Party and the Revolution (*Lineamientos de la política económica y social del Partido y la Revolución*) (hereinafter Guidelines) were approved at the Sixth Party Congress of the Communist Party of Cuba in April 2011 and shaped the following education reform. Their overall message was that Cuba will preserve the accomplishments of the Revolution, focusing on education and health, but with a differentiated approach driven by efficiency (Backer, 2011). Section 143[29] of the Guidelines, for example, noted an essential need for the social sphere, including education, to eliminate excessive costs and find means to generate revenues for their continuous improvement (PCC, 2011). On education in particular, section 145 outlined making the most out of the existing labor force, and section 148 called for reducing spending on students' transportation, food, and basic living costs (PCC, 2011). These altogether signaled the reduction or removal of some symbolic programs which were launched and emphasized in the previous decades.

First, the University for All program introduced during the Battle of Ideas was scaled back, and measures to raise the bar and improve the quality of students were emphasized, such as strengthening entry exams and academic rigor in secondary schools and universities (Ginsburg & Garcia Batista, 2019; Martín Sabina, et al., 2012). The resources were instead devoted to expanding technical vocational program (e.g. agronomy, computer science, education, medicine, etc.) (Ginsburg & Garcia Batista, 2019; Martín Sabina, et al., 2012) and moving students into

[28] http://www.walterlippmann.com/rc-07-26-2007.html [Author's own translation]

[29] "*Dar continuidad al perfeccionamiento de la educación, para lo cual resulta imprescindible reducir o eliminar gastos excesivos en la esfera social, así como generar nuevas fuentes de ingreso y evaluar todas las actividades que puedan pasar del sector presupuestado al sistema empresarial*" (PCC, 2011, p. 24).

more practical careers to reduce costs and fill gaps in the workforce.[30] As a result, the gross tertiary enrollment in Cuba almost halved[31] from 120% in 2008 to 63% in 2012 and continued to plummet to 34% as of 2016 (World DataBank).

Another major change that occurred during the presidency of Raul Castro was the closure of Schools in the Countryside (Ginsburg & Garcia Batista, 2019; Martín Sabina et al., 2012). The program appeared at the height of the revolutionary Cuba in 1971 and was designed to finance itself based on the revenues generated through harvested crops by the students (see Section From the 1970s to the 1980s). However, due to the reduced interest among students engaging in agriculture, coupled with deterioration in the overall agricultural sector in Cuba, schools were criticized for their excessive cost and inability to finance themselves, although they never did in the past (Carnoy, 1990).[32] Consequently, rural boarding schools were phased out in 2011, relocated to the urban areas, and their land was leased to the farmers (Martín Sabina et al., 2012).

In teacher training, the government removed fast-track *emergentes* and PGI programs (Espinosa Chepe, 2011) and reopened upper-secondary pedagogical schools (*Preuniversitarios vocacionales de ciencias pedagógicas*) all across Cuba which had been closed in the 1990s, "when teacher preparation became a tertiary education activity exclusively" (Ginsburg & Garcia Batista, 2019, p. 11). In 2010, 22 pedagogical schools were reopened with the purpose of more quickly channeling teaching personnel to preprimary, primary, and special education schools.

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[30] https://www.reuters.com/article/us-cuba-education/cuba-cuts-education-spending-shifts-priorities-idUSBRE89217O20121003

[31] This decline in the gross tertiary enrollment rate also in part resulted from the large expansion of university graduates in the population that took place prior to 2008, and thus the proportion of the population that "needed" to enroll in higher education was reduced.

[32] http://www.juventudrebelde.cu/cuba/2009-09-03/amplias-expectativas-genera-el-regreso-de-los-institutos-preuniversitarios-urbanos
https://www.cibercuba.com/videos/noticias/2018-09-18-u1-e186450-s27061-cuba-ha-sido-preuniversitarios-campo

Later, they expanded to preparing primary-level English teachers in 2013 as well as lower secondary teachers of subjects with teacher shortage (viz. history and mathematics) in 2017 (Ginsburg & Garcia Batista, 2019).

The 4-year-curriculum at these institutions includes academic subjects such as Spanish, history, mathematics (absent in English teaching track) and pedagogic subjects such as psychology, pedagogical theory, and practice, and from the second year, students engage in didactic practices in local primary schools (Ríos, 2013). As for the graduation requirement, a student needs to score above average of 80-85%, and generally more than half of graduating students get to teach in schools that they opted as their first choice (Ministerio de Educación, 2010). Students who graduate from a teacher formation school are also granted access to higher education in the Pedagogical Science University (in case of Havana) or school of education in provincial universities (Ginsburg & Garcia Batista, 2019).

Teacher Shortage in Cuba

Even with the reopening of pedagogical schools, the shortage of teachers[33] created during the Special Period maintained throughout the years under President Raul Castro. The problem of retaining teachers, also referred to as teacher exodus, continued as access to CUC economy widened and private tutoring became legal in Cuba. According to Rodríguez Guerrero (2013) in Granma[34], the official Gazette (*Gaceta Oficial de la República de Cuba*) first announced the private tutoring to be legal in 2010. This legalizing measure allowed for the underground private tutors[35] to surface and resulted in a continuous departure of teachers. This is because except for

[33]Earlier in the post-revolutionary period, there were also periodic shortages of primary then secondary teachers, due to expansion of public education.

[34] The official newspaper of the Central Committee of the Cuban Communist Party.

[35] Their official term is Reviewers (*Repasadores*) as the Official Gazette in 2013 define their role as the following:

languages, teachers of other subjects were not allowed to give private lessons unless they leave the public system. The same article reported that by 2013, the government had authorized 1,023 people to hold licenses to work as private tutors.

Coupled with the issue in teacher retention, recruiting and preparing future teachers became more problematic as youth were less attracted to teaching (Ludlam, 2012). Indeed, the Battle of Ideas, which was designed to instill revolutionary values and social consciousness in the young, was not successful, as their daily struggles continued and inequality grew based on the access to CUC economy (Font, 2008). Cuban youth became less interested in sacrificing themselves for national goals and entering teaching; they simply wanted to pursue lives on their own terms (Font, 2008; Ludlam, 2012). As a result, recruiting future teachers in Cuba became more difficult over time, and this was evident in the applications and enrollments in the official teacher training institutes, such as pedagogical school and pedagogical university or college of education in provincial universities, where teachers were prepared.

In higher education, the number of students enrolling and graduating with a degree in education decreased over time. According to ONE (2009; 2018a), the number of university students majoring in education was significantly reduced from 113,000 in 2008 to 44,000 in 2017. What must be noted along this enrollment trend is the government's policy to limit the available seats and make college entrance more competitive (Ginsburg & Garcia Batista, 2019; Martín Sabina, et al., 2012). Nevertheless, students' reduced interest in entering teaching were captured when calculating and comparing the graduation rate of those who entered university during the Battle of Ideas (2000 - 2003) against those who entered during the first years of Raul

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they help students study the materials of all levels of education defined in the national curriculum and help them enter higher education institution (Rodríguez Guerrero, 2013).

Castro (2008 – 2011). When calculating their graduation on time in 5 years and juxtaposing the two rates, that of the former group was much higher than the latter: it ranged from 21 to 33% (2004 – 2007) while the latter was between 6 to 13% (2012-2015) (ONE, 2009; 2018a).

In addition, depending on where the training institutes were located, the graduation rate differed significantly. This was found among the pedagogical schools. The branch in Pinar del Río reopened in September 2010, admitted 545 students who had completed the 9th grade, and in June 2014, the institution celebrated 345 teachers as their first graduates (Rodríguez & Suárez Rivas, 2014). However, this 85% graduation rate was uncommon across the other 21 pedagogical schools in Cuba. Fulgencio Oroz Gómez pedagogical school in Havana, which also reopened and admitted 670 students in 2010, was only able to graduate just over a third, some 256 students, even at a lower cut of graduation score rated at the average of 80% compared to 85% in Pinar del Río (Ríos, 2013). Across Cuba, only 4,500 from 22,000 enrolled students graduated from pedagogical schools in 2013 (Ríos, 2013).

The provinces that had low graduation rates in pedagogical schools aligned with those that suffered from severe teacher shortages. According to Barrios (2017) in Rebel Youth (*Juventud Rebelde*[36]), the provinces that experienced teacher shortage during the academic year of 2016-2017 were Havana, Matanzas, Camaguey, Artemisa, and Mayabeque; other provinces that produced enough teachers and exported them to other provinces included aforementioned Pinar del Rio, Granma, Santiago de Cuba, Guantanamo, etc., mainly located at the both ends of the island. Guantanamo, for example, during the same academic year produced 309 teachers in addition to its internal need and managed to export teachers to the provinces in need: out of 309

[36] An official newspaper of the Union of Young Communists (*Unión de Jóvenes Comunistas*) in Cuba founded by Fidel Castro in 1965. http://www.juventudrebelde.cu/

teachers, a vast majority (85%) were relocated to Havana, and the rest were split between Matanzas and Mayabeque (Merencio Cautín, 2016). In 2016, the province of Havana alone was in need of 2,000 teachers from other provinces[37].

Despite the reopening of pedagogical schools and relocation of teachers across provinces, the shortage of teachers remained, and it called for a diversification of supply chain of teachers in Cuba. Ena Elsa Velazquez, the Minister of Education in Cuba, reiterated at the beginning of each school year that the coverage is met through alternative measures, yet the quality of teaching is compromised and therefore these alternative measures are not long-term solution (Barrios, 2017; Juventud Rebelde, 2019). For instance, according to the report from MINED, a total of 7,400 teachers left the profession in 2013 and for the following academic year (2013-2014), 15,200 teachers were needed (Lotti & de las Nieves Galá, 2014). Out of the numbers required to meet the coverage, only a third was made up of the graduates of teacher training institutes and two thirds included a group of retired teachers who returned to contribute to the coverage and the rest who were not directly related to teaching (Lotti & de las Nieves Galá, 2014).

The diversification of supply chain of teachers persisted throughout the years of 2016-2017 as shortage continued even with the soaring number of graduates from pedagogical schools in 2015 (ONE, 2018a). In addition to reincorporating retired teachers and recruiting professionals from other fields to teach in schools, the government sought additional measures to close the shortage gap again in ways that were perceived as compromising the quality of teachers (Barrios, 2017).

[37] https://www.radiotelevisionmarti.com/a/habana-importara-profesores-secundaria-provincias/129450.html

Two major policies stood out in 2016: first, in response to the reduced number of university students majoring in education, the government lowered the bar by offering part-time courses (Curso por Encuentro) to the in-service teachers and accepting graduates of pedagogical schools to full-time courses without the requirement of college entrance exam (Barrios, 2017). In terms of improving the retention of teachers, MINED employed a teacher policy (La Resolución 249/2016) that paid teachers for their extra work: from 2017, teachers were remunerated for the additional hours (exceeding a minimum of 16 hours), subjects, and grades they teach (Barrios, 2017; Juventud Rebelde, 2019).

The shortage deepened with the increased departure of teachers. The teacher coverage without alternative measures for the most recent academic year of 2018-2019 was rated at 91.9%, which was significantly lower than the two previous years: 95.5% in 2017-2018 and 94.2% in 2016-2017 (Barrios, 2017; MINED, 2019). The provinces that have been traditionally short of teachers, namely Havana, Matanzas, Artemisa, Mayabeque, continued to face their problems and relied on teachers traveling from the east (Granma, Santiago de Cuba, Guantánamo, etc.) and the west (Pinar del Río).

When looking at the number of teachers who left teaching during 2018-2019, it was 12,000 which represented an increase from 11,700 in the previous academic year (MINED, 2019) and significantly more than 7,000 in 2013-2014 (Lotti & de las Nieves Galá, 2014). To cover for the loss of teachers, 13,900 were newly incorporated into the teaching force within which 38% were the graduates of teacher training institutes and the rest were a group of people from other fields patched together to make up for the shortage. They included those who do not have background in education (39%) and contractors who were hired to teach for a defined

period of time (23%), some of whom were university students majoring in subjects other than education through the project "Teaching for Love"[38] (*Educando por Amor*) (MINED, 2019).

In sum, the trend has been that the coverage was met through compromising and undermining the quality of teaching in class: lowering the entry bar for the teaching profession, diversifying the supply chains and accepting teachers with little or no education profession qualification, and shifting responsibility toward remaining teachers by imposing extra work to make up for teachers' absence.

Looking forward, the shortage of teachers is likely to continue, if not worsen, considering the current teacher's salary is relatively low compared to the national average and to the other professions in the state system, let alone occupations in the tourism-related sector. Unlike what is widely known about teachers' salary, that it is one of the best paid professions in the socialist regime (Bruns & Luque, 2014; Gasperini, 2000), 2014 was the first year when the average monthly salary of state professions was higher than that of the teachers: 584 CUP (US$ 24) vs. 527 CUP, (US $22) (ONE, 2017b). In addition, the salary gap between the national average and teachers widened to US$10 in 2017, and in the same year teachers on average made a monthly salary of 533 CUP[39] (US$22), ranked at the bottom of the pay scale along with jobs involving culture and sports (532 CUP) and community services (531 CUP) (ONE, 2018b). As reference,

[38]An initiative organized by the leadership of the Federation of University Students (Federación Estudiantil Universitaria, FEU) in Cuba since 2014 to alleviate the deficit of teachers in multiple provinces in Cuba. The university students receive training, teach in primary, lower and upper secondary schools nearby, and contract for hours (Castro Medel, 2017; Garcia, 2018).

[39] To provide reference to this salary, at the time of my visit to Havana to conduct interviews in December 2018, pork loin was 40 CUP per pound (7.5% of monthly teacher salary), cucumber was 7 CUP each, and tomatoes and limes were 5 CUP each (roughly 1% of monthly teacher salary). Despite the monthly rationing in Cuba (*Libreta de Abastecimiento*, Supplies Booklet) which provides chicken, rice, beans, soap and other basic products in a subsidized price, many informants complained that these supplies last less than two weeks, and the quality is extremely poor. Many of the informants reported that they needed to supplement the government-rationed supplies with private purchases in the markets.

jobs in sugar refining (1,236 CUP) and mining (1,219 CUP) industry were highest paid in 2017 (ONE, 2018b).

Moreover, the average teacher's monthly salary has plateaued over the past two decades, since Fidel Castro increased it to US$20 in 1999 (Sobe & Timberlake, 2010; ONE, 2017b; 2018b). However, during the similar time period, the average salary of people working in the public sector in Cuba doubled from 330 CUP in 2005 to 783 CUP in 2017. When narrowed down to those working in Havana, other public sector workers' average monthly salary skyrocketed from 316 CUP to 848 CUP (ONE, 2010; 2018b). It will not be a surprise given this salary trend if there continue to be waves of exodus that involves a large number of teachers leaving for not only the CUC economy but for any position in the state system that is not teaching.

Chapter 5: Conceptual Framework

In order to analyze the teacher shortage issue across time and explore developments in Cuba that shaped and influenced the occupational decision-making of teachers, this study incorporated Bronfenbrenner's ecological systems theory as a guiding framework. This theory will assist with understanding individuals as active participants in the society and analyze the ongoing interaction between the individuals and different layers of the society. The study also includes human capital occupational choice theory as part of its conceptual framework. Whereas ecological systems theory located individuals within a larger context and focused on the relationship between the two, the latter theory approaches them as active agents who reflect on their situation, weigh various options, and make occupational choices that benefit them the most.

5.1 Ecological Systems Theory

In 1979, Urie Bronfenbrenner introduced the ecological systems theory through his book, *The Ecology of Human Development: Experiments and Nature and Design*, with a belief that an individual develops over time based on the interaction with the surrounding environmental systems. He argued that in order to understand and explore human development, "aspects of the environment beyond the immediate situation" (Bronfenbrenner, 1979, p. 21), what he referred to as ecology, must be holistically examined. Bronfenbrenner (1979) defined the ecology of human development as follows:

> The ecology of human development involves the scientific study of the progressive, mutual accommodation between an active, growing human being and the changing properties of the immediate settings in which the developing person lives, as this process

is affected by relations between these settings, and by the larger contexts in which the settings are embedded. (p. 21)

Bronfenbrenner (1977) elaborates that the ecology with which individuals interact mirrors “a nested arrangement of concentric structures, each contained within the next” (p. 22). From the individual's immediate setting to the largest context, these structures are coined as the micro-, meso-, exo-, macro-, and lastly, chronosystem which uniquely involves a dimension of time.

Microsystem refers to the “relations between the developing person and environment in an immediate setting containing that person (e.g. home, school, workplace, etc.)” (Bronfenbrenner, 1977, p. 514). From the perspectives of Cuban teachers, family, neighbors, school, and fellow teachers fall within the context of microsystem.

Containing the microsystem is a mesosystem which, simply put, is the system of microsystems. It “comprises the interrelations among major settings containing the developing person at a particular point in his or her life” (Bronfenbrenner, 1977, p. 515). When applied to the Cuban teachers, the mesosystem encompasses interactions among their microsystem, namely the family, neighbors, and colleagues at school.

An extension of the mesosystem is the exosystem which embraces other social structures, both formal and informal, that do not directly contain individuals but encompass or impinge upon their immediate setting and thereby influence, delimit, or even determine individual’s behavior, attitude, and the relationship with the community and the societyat large (Bronfenbrenner, 1977, 1979). It includes “the mass media, agencies of government (local, state, and national), the distribution of goods and services, communication and transportation facilities,

and informal social networks" (Bronfenbrenner, 1977, p. 515). The exosystem for the contemporary Cuban teachers would involve goods and services available in the local area, teacher policies imposed by the Ministry of Education in the provincial and the national level, informal communication through social networks, and the availability of transportation facilities that enable access to other regions.

The macrosystem, on the other hand, differs fundamentally from the previous systems in that it transcends from the specific contexts and implies the "general prototypes, existing in the culture or subculture, that set the pattern for the structures and activities occurring at the concrete level" (Bronfenbrenner, 1977, p. 515). The transitional society of Cuba, which embodies a mixed culture of socialist and post-socialist norms and ideologies, constituted the particular macrosystem for the current teaching personnel in Cuba. For example, the body of knowledge, customs, material resources, opportunity structures, and life course options (Bronfenbrenner, 1994) included in this macrosystem provided the experiences for teachers in Cuba.

Lastly, a chronosystem incorporates a third dimension, time, into the environment. "A chronosystem encompasses change or consistency over time, not only the characteristics of the person but also of the environment in which that person lives" (Bronfenbrenner, 1994, p. 40). Particular time points in Cuban history generated and offered their own distinctive ecological environment for teachers. The critical periods that are of interest to this study are, after the demise of Soviet bloc which resulted in Special Period in Cuba in the 1990s and another set of economic reforms spearheaded by Raul Castro in 2008 which largely dealt with introducing practices from open market economies, such as legalizing private business and buying and

selling private properties. Figure 1 (below) visually summarizes the hierarchy of ecological systems that are conceptualized as surrounding contemporary Cuban teachers.

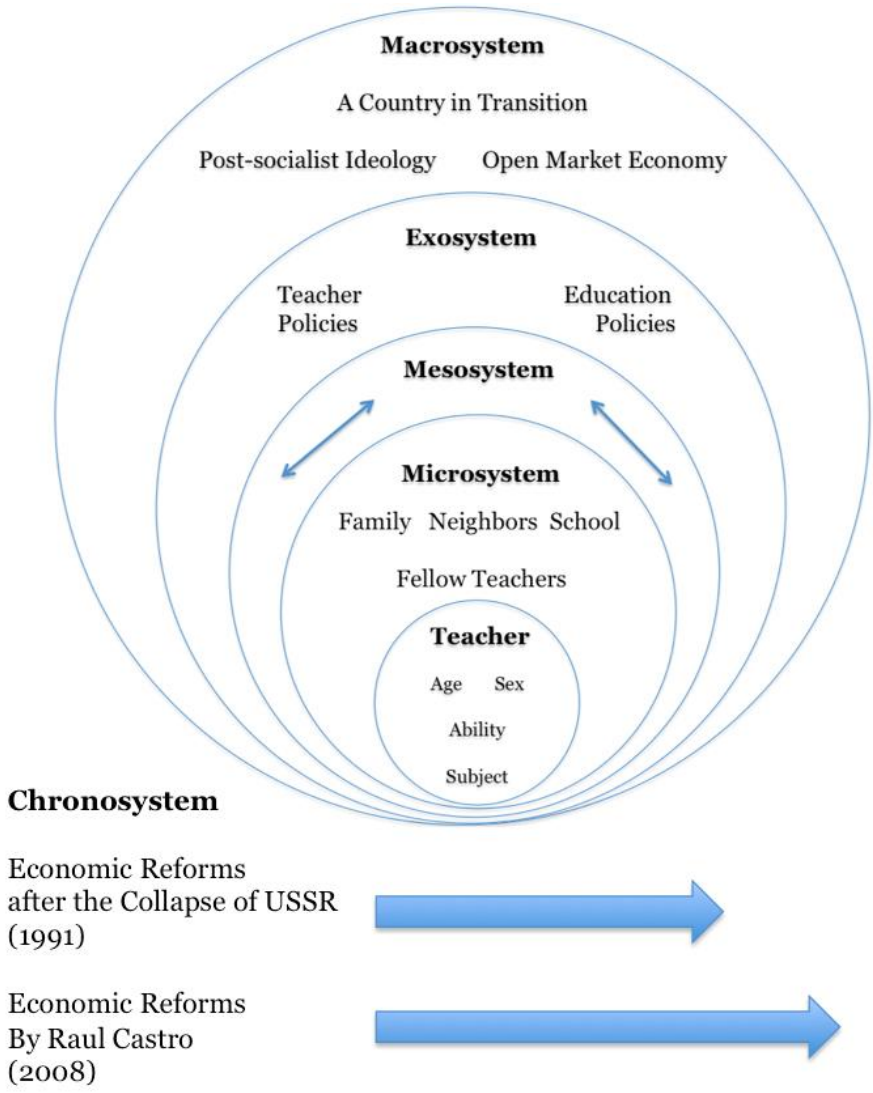

Figure 1. The Ecological System of Contemporary Teachers in Cuba

5.2 Human Capital Theory of Occupational Choice

Based on the interaction with multiple layers of the ecological system outlined above, an individual, in this case a teacher (or a student teacher) in Cuba, garners information around the occupation, consolidates, compares and contrasts against other occupations, and makes a final decision to enter, stay, or leave the profession. This process mirrors the fundamental tenet of human capital theory of occupational choice in which individuals "make systematic assessments of the likely net monetary and nonmonetary benefits from different occupations and make systematic decisions throughout their careers" (Grissmer & Kirby, 1987, p. 10). The theory explains that "individuals will choose to enter occupations or change occupations to maximize the net returns taking account of both costs of training and stream of benefits properly discounted" (Grissmer & Kirby, 1987, p. 10).

In the original model of 'Human Capital and Occupational Choice,' Benewitz and Zucker (1968) only explored monetary benefits and posited that "an individual chooses that occupation for which the present value of his expected income stream is a maximum" (p. 406). Salaries indeed play a determinant role in teachers' occupational choices and, in practice, as were the cases in the post-socialist countries including Cuba, teachers attributed the financial constraints to be the most critical factor to their departure. Therefore, "policymakers advocate substantial salary increases as a means of attracting and retaining talented teachers in the school system" (Santiago, 2002, p. 57) and those increases are usually considered in relative terms so that the new salary can compete and yield higher net returns compared to those in the alternative occupations.

Despite the fact that financial incentives are often considered as silver bullets to teacher policies, when teachers go through an occupational decision making process, they also take into account nonmonetary factors, which include working conditions, support of coworkers, the availability of adequate materials, and social status (Grissmer & Kirby, 1987; Ingersoll & Smith, 2003). For example, in the case in China, the low social status of teachers, as a result of a decade long persecution of teachers and other intellectuals during the Cultural Revolution, was one of the critical reasons for their exodus when the country opened to the market economy in 1978.

In addition to the monetary and nonmonetary benefits that enter occupational choice decisions, the cost of training is another component that individuals take into account when calculating the net return and subsequently choosing an occupation. The cost not only covers the direct cost for schooling, the tuition and living expenses while in school, but also includes the forgone earnings that occur while an individual obtains additional skills and is absent from the labor market (Grissmer & Kirby, 1987). Approaching from the cost aspect in the cost-benefit analysis, teachers are not likely to pursue an occupation if the training is either too costly or the opportunity cost of teaching is relatively high compared to that of the alternatives which require a similar cost of training and the level of qualification. Therefore, one of the common strategies that the governments in the developing countries take is to provide subsidized room and board in teacher training institutions in order to recruit highly competent students and make teaching more competitive by reducing the cost (Stromquist, Klees, & Lin, 2017).

Another aspect that influences the individual's occupational decision is the occupation-specific human capital which, according to Grissmer and Kirby (1987), is accumulated as one pursues a career in a particular profession. An occupation-specific human capital is often

translated to a wage premium and it is to award the professional knowledge, contacts, and networks that individuals navigate and build as they become experts in the field. Grissmer and Kirby (1987) posit that if the profession is highly occupation-specific, in other words, if the professional knowledge, contacts, and connections are exclusive to that profession and less transferrable to others, individuals are less likely to leave. This corresponds to the finding in post-Soviet countries where teachers with the least occupation-specific human capital, who were in their early career and teaching relatively transferable subjects such as English, math and science, experienced the highest rate of departure.

Chapter 6: Methodology

This chapter presents the research design, data collection procedures, data analysis strategies, researcher positionality, and ethical issues related to the dissertation study.

6.1 Research Design

In order to examine the issue of teacher shortage in Cuba and to understand how diverse stakeholders in the education system (e.g., government officials, teachers, former teachers, student teachers) have responded and reacted to it, document analysis and qualitative interview research method have been employed. The document analysis assumed a macro-level approach to identify the trends across time when Cuba encountered teacher shortage and how the government responded by implementing policies in each case. Based on this foundational work, the qualitative interview portion of the study helped confirm and crosscheck how each policy was put in practice and affected the lives of Cuban teachers and their surrounding school community.

I considered qualitative research to be a good fit for this study because of the social constructivism that this interpretive paradigm draws upon. Social constructivism assumes that each individual has his/her own way of understanding the world and therefore the role of the researcher is not to narrow or categorize people's ideas, but to discover and describe the complexity of multiple views (Creswell, 2013; Mertens, 2010). By drawing upon social constructivism and applying qualitative research methods, this research sought to provide distinctive portrayals of teacher shortage issue in Cuba based on the description and interpretation of a variety of individuals in the school community. Even among teachers, depending on their social standing, they may offer distinctive lived experiences. For instance, the

retired teachers who returned after witnessing the shortage issue would likely understand and portray the phenomenon differently from those who recently joined the teaching force.

In addition, social constructivism assumes that people's subjective meanings of the world are negotiated socially and historically (Creswell, 2013; Mertens, 2010). "In other words, they are not simply imprinted on individuals but are formed through interactions with others and through historical and cultural norms that operate in individuals' lives" (Creswell, 2013, pp. 24-25). Acknowledging that all knowledge is socially and historically constructed, I attempted to tease out how the shortage of teachers in one specific time would be perceived and communicated differently compared to others and, thus, lead to different behaviors in the teaching force. For example, to the nationwide search for more teachers in the early revolutionary days, many citizens responded with actively joining the teaching force; however, to the shortage issue that is felt in the current days, the public's response has been the contrary, which was a continued departure and a reduction in decisions to enter the profession.

6.2 Data Collection

Document Analysis

I primarily depended on the open source provided by the National Office of Statistics in Cuba (La Oficina Nacional de Estadísticas de Cuba, ONE) as the guiding information that may signal the potential teacher exodus and/or shortage from 1958 to 2017. The statistics obtained from ONE offer a variety of information about the teachers in Cuba: for example, the numbers in the total teaching population by the level of education and by province and teacher salary relative to other professions in the public sector. The numbers of teachers, for example, required a careful

examination, since it only informs the changes in total size and does not indicate the actual shortage.

In addition to this numerical data from ONE, I referred to the relevant articles from journals and newspapers, such as *Granma* (by the Cuban Communist Party) and *Juventud Rebelde* (by the Union of Young Communists). I searched for articles that covered the phenomenon of teacher shortage and introduced teacher policies to address the issue. Both are critical sources of information given their status as official newspapers authorized by the party and government. As they address the public and communicate with them directly, they carry a specific tone of voice and reflect the party's and government's approach to the shortage problem. I used the result of this review to either craft the interview questions or confirm the discussion during the interview.

Qualitative Interview Research

I engaged in a sustained, in-depth investigation of the teacher shortage issue in Cuba in December 2018 through semi-structured and informal interviews with diverse stakeholders in the education system. The study includes two main groups of participants: Cuban teachers (current teachers, former teachers, student teachers, retired teachers) and supervisors that work for the MOE and experts on teacher education in Cuba (The President of the Association of Cuban Educators and the Dean of the Faculty of Foreign Language Education at Enrique José Varona Pedagogical Science University), whose interviews were more informational with a purpose to collect contextual information, confirm the arguments raised by the teachers and supervisors, and ask their professional insights and reflections on the phenomenon of teacher shortage in Cuba.

As for the site visits, I set my regional focus on Havana, where the problems of teacher shortage are pronounced the most, and the in and out mobility of teachers is most active. I hired a research assistant for this dissertation study to maximize my field study in Havana. She helped with recruiting interview participants; translating English to Spanish, if necessary though the interview was led by me; transcribing the recorded interviews for the analysis; and following up with the informants to seek more information. I selected her for the professional profile she held, which critically tapped into all criteria of the informants I sought in this dissertation study. She was a young teacher from Havana, who recently graduated from Enrique José Varona Pedagogical Science University (*Universidad de Ciencias Pedagógicas Enrique José Varona*, UCPEJV) and at the time of the data collection taught English in middle school and at a private home (converted into classrooms) along with other fellow English tutors[40]. By relying on her social network, I was able to recruit individuals with diverse profiles, with whom she interacted actively during different time points throughout her career.

Interview Strategy

In total, 24 people were recruited and interviewed for this research. I conducted individual interviews, and group discussions based upon request, and engaged in an hour long to an hour and a half long conversation with each informant. Before the interview, I tried to build good rapport with the participants by introducing who I am, informing the purpose of the research, and discussing some ethical considerations so that they feel secure and comfortable to share their personal thoughts and opinions. I intended to invest as much time as possible on the

[40] Some private tutors transformed their homes into classrooms, recruited fellow tutors and formed an informal network, which mimicked a private language institute. This modality of self-employment (*Cuentapropista*) in Cuba was officially termed *Proyecto Educativo*, educational project in English.

pre-interview stage, because based on the result of this relationship building, participants may adjust or refrain from revealing their personal opinions.

This was critical due to the sensitivity of my research topic. My study sought to illuminate a negative aspect of the education system, which Cubans feel proud of and is perceived as the legacy of the Cuban Revolution. The shortage of teachers in the classroom has in fact settled as a public concern and is a topic that is officially communicated by the Communist Party.[41] However, to prevent hesitation and a possible delay in expression, I highlighted that the purpose of this research not only lay in the completion of my dissertation, but also in search for possible avenues to mitigate and, hopefully, contribute to solving the problem of teacher recruitment and retention. At the beginning of the interview, I also stated that this research was sponsored by the APC (*Asociación de Pedagogos de Cuba*, the Association of Cuban Educators).[42]

As participants seemed ready to commence with the interview, I asked their permission to record. In fact, all interviews were recorded with permission. The research assistant accompanied me at all times when I conducted individual interviews, and she transcribed our recorded conversation. After the first round of coding of the interview data, I followed up with some of the informants to confirm the preliminary findings and probed further the remaining questions.

[41] Retrieved on February 8, 2018 from: http://www.granma.cu/cuba/2016-04-22/educacion-cubana-compromisos-y-deudas-22-04-2016-23-04-36

[42]To formally conduct research in Cuba, one needs to hold a research license authorized by the MOE, and an expat needs a research visa to enter the country. Sponsored by the President of APC, I submitted the application of the research license in February 2018, but it was rejected in the following month. Regardless, the President of APC agreed to help with my dissertation study and it was carried out unofficially with my status holding a tourist visa.

Participants

The first group of interview participants consists of Cuban teachers and supervisors. I classified them into current teachers, former teachers, student teachers, retired teachers, and supervisors, as altogether they represent the overall teaching force in Cuba. For the current teachers, I recruited primary and secondary teachers who had entered the field at various points in time. They included those who entered before, during, and after the Special Period (i.e., the 1990s), as well as those who entered in the 2010s. The former teachers comprised those who dropped out of teaching, and at the time of the interview, held positions other than teaching (e.g. private tutor, waiter, housewife). In the sample, I had four students who attended teacher training institutions: two enrolled in the pedagogical school at the secondary level and the other two enrolled in UCPEJV at the tertiary level.

Retired teachers encompassed two groups, those who retired yet continued to teach due to teacher shortage in schools and those who retired for good. Only one out of four in the sample in fact retired and had left the field. Supervisors, called *Metodólogos* (directly translated to Methodologist in English) in the Cuban education community, referred to the officials at the MOE who are divided into districts and subjects and are responsible for supervising and training teachers. Their specific tasks include conducting weekly meeting with subject teachers, analyzing the teaching and learning process in the classroom, collecting student learning results on the subject, and communicating with the school management (Ministerio de Educación, 2014). They were included because of the unique role they play in the education community. They channel the conversation between teachers and the MOE, and with their close contact with

both groups, they were able to represent both voices. Moreover, the supervisor's role can be considered as a step in an educator's career after having been trained and worked as a teacher.

During individual interviews or group discussions with the Cuban teachers, I mainly probed their process of occupational decision making: why they pursued a career in teaching, what motivates and de-motivates them to remain in teaching; if they had left, what were their principal reasons; and if they had stayed, whether they have any plans to leave. I also delved into their philosophy of teaching and their understanding of teaching as a profession. I asked how they interpret economic crisis and teacher exodus and examined the ways in which this social phenomenon shaped their perception towards various themes of teaching, such as teacher professionalism, teacher's motivation, teacher's social status, and teacher's performance in the classroom. I also asked what other career options they have depending on their professional profiles. I closed the session by asking about how they viewed prospects for the teaching force and for public education as a whole. The interview protocols can be found in Appendix A.

Two experts on teacher education in Cuba were recruited for an informational interview (an example of interview questions can be found in Appendix B). The President of APC, Dr. Gilberto A. García Batista, with whom I became acquainted during the previous four years participating and leading the educational research program in Cuba, *Búsquedas Investigativas* (hereinafter Búsquedas). He formerly served as the Dean at UCPEJV, located in Havana, and worked in the MOE at the Department of Teacher Training and directed the post graduate training of teachers. Moreover, the Dean of the Foreign Language Education Program at UCPEJV, Dr. Martha Susana Neufville Morris, was recruited since she closely experienced the rise and decline of the quality of student teachers across decades and that of the teaching

population at large. The fact that foreign language (particularly, English) plays a key role in teacher exodus also added my interest and importance of recruiting her. The list of the interview participants and their classification are presented in Table 1 (below).

Table 1

The List of the Interview Participants and Their Classification

Classification	Number of Informants	Pseudonym
Student Teachers	4	Juanita, Madiery, Laura, Luana
Current Teachers	6	Alonso, Marcelo, Veronica, Diana, Elena, Mercedes
Retired Teachers	4	Emiliana, Natalia, Joaquin, Carolina
Former Teachers	6	Sammara, Matias, Eleonora, Jesus, Pablo, Angela
Supervisors	2	Humberto, Rodolfo
Experts*	2	Gilberto, Martha
Total	24	*I do not use pseudonyms, with their permission.

6.3 Data Analysis

Document Analysis

The analysis of the documents primarily occurred before and after the field study. In Havana, I tried to maximize my time to collect data via qualitative interviews. Before my departure, the numerical data from ONE helped to tease out possible teacher shortage that took place between 1958 and 2017. I reviewed the data such as the total number of schools, total number of teachers, total number of teacher trainers, total number of teacher training schools, and total number of enrollment and graduation of student teachers, and if available, probed further into the disaggregated data. I reviewed the data by the level of education and by location, such as per province and the rural and urban divide.

I initially coded for the years that could potentially indicate *excessive demand for teachers* or *insufficient supply of teachers* and identified shortage by crosschecking with other

literature. Shortage can occur at any time regardless of whether the total size expands or declines. Therefore, when utilizing this aggregated number as a proxy, I applied the following questions to detect a possible shortage: Does the number signal a potential shortage? What are the other sources of evidence to confirm the shortage? Was the shortage driven by the excessive demand or insufficient supply? If by insufficient supply, is it due to the problems of recruitment or retention?

Granma and *Juventud Rebelde* newspapers published from 1965 onwards were useful to verify the preliminary findings from the analysis of ONE data. I searched under the section on education where the articles referred to *teacher shortage, problem in teacher recruitment and retention, and teacher exodus* and inductively coded to look for areas that covered *reasons for teacher shortage, response strategies, result of the coverage policies, governments' self-reflection and evaluation,* etc. When the specific time points and their associated cause of teacher shortage were identified, I deductively coded the corresponding teacher policies based on the coding schemes constructed from the literature review. The examples of categories are *increase in salary, reduced qualification requirements, decrease in entry standards, diversify the supply pipelines*, which are inspired by the review on post-socialist transitional states in Chapter 3.

Given the official status of these two newspapers, I further raised the following questions to enrich the analysis: How differently is the Cuban party and government framing and addressing the teacher shortage issue across time? What piece or kind of information is absent in *Granma* or *Juventud Rebelde,* compared to the data from ONE, and what would be the party's and government's underlying motivation to do so?

Stakeholder Interviews

This study includes the two main groups of participants, Cuban teachers (current teachers, former teachers, student teachers, and retired teachers) and the supervisors as well as the experts of teacher education in Cuba (the President of APC and the Dean of Foreign Language Education Program at UCPEJV). After the interview, all conversations were transcribed verbatim in their entirety and the field notes were typed in a narrative form. Once the data were ready to be analyzed, I read through the transcripts, tried to understand the interviews as a whole, and checked the accuracy while listening to the recordings.

The interviews with teachers largely addressed the main research question focusing on the main reason for entering, remaining in, or leaving the profession. The data collected from the interview first went through an inductive coding to look for emerging themes and to outline the career trajectory of each informant. The analysis yielded a description of an individual, including a brief biography, processes of occupational decision making, as well as the context in which the decisions were made. Acknowledging that teachers' career decisions were deeply influenced by the time and the social context in which they were made, the result of this analysis was organized in groups based on a teacher's entry year into teaching. The categories of informants are listed in Table 2 (below), and the result of the analysis can be found in Chapter 7.

Table 2

The Classification of Informants Based on the Stage of their Teaching Career

Group Number	Classification	Pseudonym
1	Student teachers who were enrolled in a preservice program in: - a pedagogical school - a pedagogical science university (UCPEJV)	 Juanita, Madiery Laura, Luana

2	Graduates of pedagogical science university who did or did not enter employment as a public school teacher in the 2010s	Sammara, Alonso, Matias, Humberto
3	Teachers and former teachers who began their employment in the 2000s	Marcelo, Jesus, Angela, Pablo
4	Teachers and former teachers who began their employment during the "Special Period" (From 1989 to 1990s)	Rodolfo, Eleonora, Veronica, Diana
5	Teachers who began their employment between 1972 and 1987 before the "Special Period" and either had or had not retired	Elena, Mercedes, Emiliana
6	Teachers who began their employment between 1966 and 2010 and who retired yet continue to work as a public school teacher	Natalia, Joaquin, Carolina

After the inductive coding and identifying each informant's main reasons for entry, continuity and departure from teaching, I deductively coded the interview data based on the conceptual framework of occupational decision-making theory and the ecological systems theory. I coded how individuals were driven by *monetary benefits, relative income, nonmonetary benefits, etc.* and how various systems that surround informants, from *the individual level, microsystem, exosystem,* to *macrosystem*, influenced and determined their decision to enter, stay, and leave the profession. The emerging codes categorized by the corresponding ecological system, the deductive codes, are displayed in Table 3 (below), and the result of this analysis can be found in the first section of Chapter 8.

Table 3

Emerging Codes Categorized by Their Corresponding Ecological System

Ecological System	Codes
Individual Level	*Interest in the teaching subject (English)* *Interest in teaching and teaching as a profession*

	Interest in obtaining a bachelor's degree *Age*
Microsystem	*Opinions of the family members* *Classmates at the preservice program* *Poor learning environment at the preservice program* *Fellow teachers* *Poor teaching environment in public schools*
Exosystem	*Teacher salary* *Alternative jobs for public school teachers*
Macrosystem	*General values* *Perspectives toward the government*

During the interview, I also investigated the perception of teachers (e.g. teacher performance, professionalism, motivation), teaching, and formal education in Cuba. I directly requested their own definition of these concepts and probed further by asking whether it aligned with that of the government. The data on this discussion was largely inductively coded with few deductive codes, such as *teacher performance*, *professionalism,* and *job satisfaction,* inspired by the literature review. I also openly coded the discussion regarding informants' prospects on the phenomenon of teacher shortage and its impact on public education as well as the student performance in Cuba. Most of findings from this analysis are embedded throughout Chapter 7 and 8.

When the inductive and deductive coding was complete, I undertook a comparative analysis across groups inspired by the social constructivism. What was central to the data analysis of this dissertation study was to tease out the multiple views and portray the various subjective meanings concerning choices to enter, remain in, leave, and return to public school teaching in Cuba. Therefore, the analysis intended to illustrate how different groups of informants, depending on the time of the entry to teaching (e.g. before the Special Period, during

the Special Period, in the 2000s, and in the 2010s), relied heavily on a particular factor or a set of factors, when engaging in their occupational decision making. The results of this analysis can be found in the second section of Chapter 8 and, based on this comparative analysis, I was able draw policy implications with some targeting a particular group and others covering the overall teaching population in Cuba.

The two experts were recruited for an informational interview to collect more data on the context. From the President of APC, who has decades-long experience at UCPEJV and at the MOE on teacher training, I was able to gain a macro-level understanding of teacher shortage throughout the Cuban history and learn about the response policies that the government prepared to tackle and mitigate the shortage. From the Dean of the Foreign Language Program at UCPEJV, I captured more information on the teacher recruitment problem over the past few decades and the future prospects on this particular issue. The analysis of the interviews mainly involved juxtaposing their professional review of the phenomenon of teacher shortage against the official statistics, literature review as well as what is experienced and elaborated by the informants and crosschecking for the alignment and misalignment between the two. Given the nature of these interviews, the input of the two experts was incorporated in Chapter 4 and the last sections of Chapter 8.

6.4 Researcher Positionality

My relationship with the countries in Latin America and the Caribbean began when I visited Peru in 2008 as a delegate of Republic of Korea at an international conference. Spending a month in Peru traveling from Puno to Lima, I was fascinated by the culture that is vastly different from that of the West or Korea and, when I left Peru, I made up my mind to come back

to Latin America in a year. By the time I obtained a job in KOICA (Korea International Cooperation Agency) in Paraguay, I had learned Spanish for a year but most of my language skill was built in the country. In Paraguay, not only my Spanish but the way I navigate the Hispanic culture was self-taught and largely explored. The etiquettes, the family relationship, religion, and the way I am perceived as a young Asian woman, paved my path and were translated into other settings when I continued my career in Latin America.

Cuba was rather a natural transition reflecting on my profile, an educator from a country that is heavily education-oriented and built a career in one of the most economically and educationally deprived countries in Latin America (i.e. Paraguay). Moreover, the political aspect of Cuba, the fact that it is a communist country greatly attracted me based on my early education in Korea, which included activities that were politically dichotomous – capitalism vs. communism – and essentially anti-communist. Since my first visit in Cuba in 2012, I was fortunate enough to visit the country every year or at least every other year and grew fond of and academically intrigued by its education system. My visits involved a research trip to investigate Cuban literacy program *Yo Sí Puedo* (Yes I Can in English), three trips of Cuba-US education exchange program (*Búsquedas Investigativas*), and a few additional trips to prepare for the data collection of this dissertation study.

Throughout the multiple visits, my black and white approach to its political and education system went through constant changes and became grey with some areas becoming darker and others becoming lighter. From the first few visits to Cuba, I was fascinated by how the country prioritized education and with limited resources, can achieve so much on educational terms (i.e. student learning performance in international tests, teacher qualification, etc.). As the number of

visits accumulated, I gained a much wider view, not only their success but the challenges in Cuban education system, which I realized that they were rarely discussed not only by Cubans but also by international scholars. Much less was known and discussed regarding these challenges which led to my interest selecting teacher shortage as my dissertation topic.

I believe this prelude to the country and the basic Spanish skills I have built over the years provided a solid foundation to embark on this study. The relationship I have built with Cuban educators over the years also granted me an access to the teacher training institutes and various school communities, which otherwise would have been impossible if I were to attempt without their network and support. My Spanish skill, although limited, was useful enough to deliver basic ideas and especially my passion toward Cuban education and was critical in terms of building a close relationship with key members at the APC. So far, I have personally felt that Cubans or people from Latin America appreciated and were intrigued by the fact that an Asian woman spoke Spanish with a strong Paraguayan-Guaraní accent.

6.5 Ethical Considerations

Informed Consent

While recruiting and at the beginning of each interview with the informants, I carefully explained and reiterated what was written in the invitation letter (see Appendix C). I sought their permission before proceeding with the interview and at its culmination, I handed them my personal information and that of the APC to contact if they have any questions and concerns.

Confidentiality

For the confidentiality purposes, the name of the participants (other than the “experts”), locations, schools (with the exception of UCPEJV) are altered in this dissertation, and the

interview recordings as well as the transcribed data were kept on a password-protected computer that I alone have the access to. All the field notes were stored in a locked room in my site lodgings and once they were typed up, they were also subject to password protection on my computer.

Chapter 7: Teachers in Contemporary Cuba

7.1 Introduction

The purpose of this chapter is to present the career histories of twenty-two informants who were interviewed for this study. The histories mainly include their personal background and the milestones of their career such as the entry, teaching experience, leaving, or continuing teaching even after retirement. Introducing the informants was considered a critical step in that it situates how and why an individual with a particular profile made various occupational decisions. To identify the linkage between their profile and decision-making, twenty-two informants[43] were divided into six groups. The categorizations were based on their stage in the teaching career, from preservice preparation to the continuation after retirement. Given the review in the earlier chapters, the societal context existing during different historical periods in which they began, continued, or discontinued their teaching career likely influenced their occupational decision making. The six groups are listed as the following.

Table 4

The Classification of Informants Based on the Stage of their Teaching Career

Group Number	Classification	Pseudonym
1	Student teachers who were enrolled in a preservice program in a pedagogical school or a pedagogical science university (i.e. UCPEJV)	Juanita, Madiery, Laura, Luana
2	Graduates of pedagogical science university who did or did not enter employment as a public school teacher in the 2010s	Sammara, Alonso, Matias, Humberto
3	Teachers and former teachers who began their employment in the 2000s	Marcelo, Jesus, Angela, Pablo

[43] The remaining two participants were the Dean of the Department of Foreign Language at UCPEJV and the President of Teachers' Association in Cuba who served the role as informants and collaborators to crosscheck the interview results, provide more insights into the context, and help understand the findings.

4	Teachers and former teachers who began their employment during the "Special Period" (From 1989 to 1990s)	Rodolfo, Eleonora, Veronica, Diana
5	Teachers who began their employment between 1972 and 1987 before the "Special Period" and either had or had not retired	Elena, Mercedes, Emiliana
6	Teachers who began their employment between 1966 and 2010 and who retired yet continue to work as a public school teacher	Natalia, Joaquin, Carolina

7.2 Student teachers in a pedagogical school or the pedagogical science university

There were four informants who were enrolled in preservice teacher training programs in Havana at the time of the interview. Juanita and Madiery were enrolled in a pedagogical school majoring in English education and Laura and Luana were studying the same but in Enrique José Varona Pedagogical Science University (*Universidad de Ciencias Pedagógicas Enrique José Varona*, UCPEJV). The career histories of students will be outlined individually; however, students were jointly interviewed with their institutional peers, based on their request.

Juanita

Juanita was a third-year student at a pedagogical school in Havana majoring in English education. She identified her reasons to enter teaching because she likes language and likes to work with kids. She was initially interested in entering military high school but was attracted to the English education program at the pedagogical school because she said that she is not good at math and "the curriculum does not include math." After graduating from the pedagogical school, she plans to complete her three years of social service by teaching English in a primary school and at the same time enroll at UCPEJV to get a bachelor's degree.

In the conversation about her experience studying in the pedagogical school she discussed the shortage of teachers in her institution. She noted that her class was left without an English teacher for four to five months during the second year of the program. Because of the difficulties in recruiting teachers in pedagogical schools, her instructors tended to be recent graduates of UCPEJV and are thus often inexperienced. As an example, she talked about her homeroom teacher from the previous year, who was in her first year of teaching English, did not really know how to teach, and left after two months on the job. Recalling last year, Juanita noted: "it was really difficult. We complained all the time because we needed teachers, because in the fourth year we cannot graduate not knowing anything."

Madiery

Following up on the words by Juanita, Madiery, who is also a third-year student in the English Education program in the same pedagogical school, explained further on the issue of teacher shortage in their school:

> School is not bad; it is good, but it is just that there is a shortage of teachers. So, it is what makes learning difficult …. Let's see, in our first year, there was a shortage in the English Department. There were seven teachers, but the department chair made them enroll in a graduate program to continue studying. They did not want to go. All left except for one teacher. That's how we started our second year [missing six instructors].

For Madiery, teaching was her first choice for a profession. Like Juanita, she likes language and also likes to work with kids. She became interested in teaching through her

participation in a Circle of Interest[44] (Círculo de Interés) in the 9th grade. With regard to her experience in the pedagogical school she expressed difficulty studying with many of her classmates who are not really interested in learning and becoming teachers. She explained that around a third of her classmates are there because they did not make it in other types of high schools:

> [They are at this pedagogical school] perhaps because of their parents. They didn't have any other options …. Sometimes, it is a little difficult [to study with them] because they are a little spoiled and they interrupt class. But when they are not there, everything is fine.

After graduating from the pedagogical school, Madiery plans to complete her three years of social service by teaching English in a primary school and at the same time enroll at UCPEJV to get a bachelor's degree.

Laura

Laura is a fourth-year student at UCPEJV majoring in Foreign Language Education[45]. She decided to enroll in this program because she likes English and she is not good at math. She added that her mother is an English teacher in middle school and, when she was little, she always imitated her and wanted to become a teacher. Her mother, however, did not support her when she decided to study in UCPEJV:

> My mom in the beginning told me, 'I want you to study something else.' Because when she was studying, the time was different. Now there are many options and career paths. But after I told her, 'I'm going to choose this [pedagogical science university program],'

[44] The Circle of Interest is organized by professions, and students in middle school rotate different circles to explore various career options. These activities help them decide their preferences in high schools and in the long run guide their future career path. https://www.ecured.cu/C%C3%ADrculos_de_Inter%C3%A9s

[45] Faculty of Foreign Language Education (*Facultad de Educación en Lenguas Extranjeras*) primarily trains English teachers across all levels of education. Students can choose French as an additional language.

she supported me and said, 'Study and prepare yourself well, so you can work on other things. You can expand.'

With regard to Laura's experience in UCPEJV, much of it overlapped with how Juanita and Madiery described their experiences in the pedagogical school. First, many of her classmates entered UCPEJV because it was the only available major based on their performance in the university entrance exam. Laura explained that "they are there to get a bachelor's degree." In addition, she said, "many students over the years had lost their interest in becoming teachers because it is not a profession that is well paid."

Laura also mentioned that UCPEJV provided a poor learning environment driven by a shortage of professors and a lack of instructional resources. In her fourth year she needed to complete the first chapter of her thesis. She complained that this experience was really a "self-study" without a proper guidance by an advisor, due to the limited number of professors in the department:

> There are 10-15 professors overseeing 100 students[46]. And not just the 4th year students, because there are 5th year students too. There are many. So, you do research by yourself. You are the one ... finding out how to write an introduction, methodology, baseline, and everything. It is difficult.

In terms of lack of resources in UCPEJV, she talked about her freshman year when she was baffled to find out that there is no hard copy of English textbooks. All materials were provided in a digital format:

[46] Laura noted that there are about 100 students in each grade. Altogether, 10-15 professors need to oversee 200 theses each year.

> In my first year when I entered university, I thought, 'How am I not going to have an English book!' It is [better] … when you have a printed book that you can read on paper whenever you want. The digital book you need to have a cell phone, laptop, or a tablet …. I don't have a laptop…. How am I going to study?

Laura at the time of the interview was doing her practicum in a middle school teaching English. She enjoyed her time interacting with students after class and sometimes helped them with homework from their private English lessons. One of the challenges she identified in teaching was the wide range of English skills among the students:

> Some start English in primary school taking private lessons. So, by the time they reach middle school, they speak more or less English. There are others who do not speak English at all. They speak nothing, so you cannot treat [them] the same way…. So, you need to know how to manage all. And this shows. I don't like it because there is a difference. One [a student who has been taking private English lessons] will stand out more than others [who have not]. But already it is taking place too much because more students are taking private lessons than not.

Given that she enjoys teaching despite all the difficulties, she is undecided whether she will or will not pursue employment as a public school teacher after graduating from UCPEJV. She "would like to stay;" however, she referred to "the recent graduates who went into private sector, tourism, or other fields," saying that "nobody wants to be a teacher." As a major solution to teacher exodus and the mushrooming of private tutoring, she thinks "if teachers are paid at the level of work they do, there won't be too many private tutors, and teachers would be interested in teaching in the public system and do a good job."

As reference to how much tutors were paid in the private sector, Laura provided an example of a private English institute near her place. Students paid 30 US Dollars for learning materials such as textbooks and workbooks and in addition paid 10 US Dollars monthly as tuition[47]. The classes were two hours long and twice per week. Tutors receive about 50-75%[48] of each student's tuition and they are paid by the number of students they have in class. To compare, an average public school teacher in Cuba made 22 US Dollars per month in 2017 (ONE, 2018b). By teaching three to four students four hours per week, a tutor can earn the monthly salary of a teacher.

There were other payment systems where students pay per class. Laura said when she prepared for math test in the university entrance exam, she paid her private tutor 2 US Dollars per class. She also added that compared to when she was studying in 2013-2014, the tuition for private lessons was rising: the same private tutor now charged 5 US Dollars per class.

Regarding the next step in life, Laura also thought about leaving Cuba, since her brothers and many other family members live in the U.S. Her thinking was driven by her concern and uncertainty about the future situation of living in contemporary Cuba:

> Even when I graduate, I won't have a job that will be [financially] secure, that will help cover my needs, and feel good about myself.… We are young and sometimes we do not have those opportunities. If I was given the opportunity [to leave Cuba], I would.

[47] Los Biliguitos, the first private English institute for children in Vedado (therefore possibly the first in Havana or Cuba) charged each student exactly the same.

[48] Sammara noted that when tutors work at a private learning institute, they receive about 50-75% of each tuition that their students pay. The rest is kept by the owner and the owner pays the government to maintain the license.

Luana

Luana is also a fourth-year student in the Foreign Languages Education program at UCPEJV. And, like Laura, English Education was also her first choice in university majors. Since she was little, she had always wanted to become a teacher, and she liked language, English in particular. Her mother was a former primary school teacher but left teaching after her social service and now works at the airport. As a fourth-year student, she was also doing her practicum in middle school. She came to like teaching more as a result of her experiences in the practicum. With regard to her love for teaching and interaction with students, Luana stated:

> I teach two classes and I have one class that is tough to teach. There are 34 students in that class. It is tough but I have so much fun with them. I love it. I love to arrive to the classroom. And sometimes during class they engage in learning and ask questions, 'teacher, how do you say this?' When I arrive to the class and they greet me …. Even when I run into them on the street, [they greet me] 'teacher, teacher, how are you?

A few challenges that teachers face according to Luana included lack of instructional materials as well as the heavy workload of teachers, who had to cover classes that were not being covered because of a shortage of teachers. Often teachers have to pay for teaching materials or make students bring the needed materials. Regarding the heavy workload of teachers, Luana referred to one of her teachers who loved teaching but was exploited to teach multiple classes. Until one day she decided "I cannot continue" and abandoned teaching. In fact, she saw many competent teachers who were in their twenties leave public school teaching for jobs in the airport, customs, or private sectors.

Given the mixed impressions about the teaching profession, she also remained undecided about her next career steps. It seemed like her family and friends were adding more confusion:

> My friends and families ask me, 'Are you going to continue teaching? What will you do after you graduate? I always tell them I want to finish [my degree] … you have to first have a degree. Without it, you don't have anything.

7.3 Graduates of pedagogical science university who did or did not enter employment as a public school teacher in the 2010s

There were four participants in the interview who fell under this category. Three out of four informants were classmates of the Faculty of Foreign Language Education who graduated from UCPEJV in 2018, yet only one entered public school teaching to complete his social service; the others did not, having decided that they did not want to be teachers. The remaining one informant graduated from the pedagogical science university in Santiago de Cuba majoring in Foreign Language Education in 2014 and was working in the public school system as a supervisor[49] of the English subject in a municipality in Havana.

Alonso

Alonso is one of the three graduates of UCPEJV in 2018. At the time of the interview, he was teaching in a pedagogical school in Havana as part of his social service and taught English pedagogy to Juanita and Madiery. In addition, he was teaching private English lessons in the evening. Given his high proficiency in English, he answered most questions in English. To the question why he wanted to become an English teacher, he replied:

> "Because I didn't know what I wanted to be. [Initially,] I wanted to be a lawyer. [However,] I didn't like the idea of being a lawyer [because] …. I don't want to live in

[49] For more information on the role of supervisors or *metodólogos*, see Chapter 6.

> Cuba, I … want to move, and that's a big problem because law changes in each country …. So, my father told me, 'You know what? Study English, it will always be helpful.' And [then] I entered UCPEJV and I liked it! The first time I went into a classroom I liked it. This is why I am a teacher today."

During his first practicum, Alonso realized that he liked teaching. It was his first year in the pedagogical science university, and he was sent to a middle school to teach for a week. He recalled, "[We were sent in pairs] and my partner and I were thrown to a classroom…. [We] tried to create an activity…. I liked interacting with students and at that moment, I realized that [I liked teaching]." His comments on his private English lessons also reflected that he thoroughly enjoyed teaching and that he was a true education professional:

> I try to keep my students motivated. For me, that's the most important thing. I come up with activities that involve them. I try really hard to make learning personal…. [I learned this from writing my thesis.] In my thesis, I studied the concept of 'compelling.' It is a word that Krashen used…. Compelling is the state that you are in, a … flow. You don't sense what you are doing. So, you are studying English and if the input I give to you is compelling … you like it, you are not realizing that you are studying English. That's what I try to replicate. It's really hard.

After finishing his first year in the pedagogical school, he wished to move to the University of Havana (UH) as an English instructor. Two factors played into this decision. First, he wanted to move to UH to obtain a scholarship to study abroad. The idea to leave Cuba was heavily influenced by his brothers living in Spain and Peru and his mother working as a community doctor in Venezuela. Second, because he liked teaching, he wanted to search for a

better teaching condition. That is, he would continue teaching private English lessons for a better salary and teach students at the university level for their better discipline. Based on his experience teaching part-time courses (Curso por Encuentro) as a student teacher in UCPEJV, he compared his teaching experiences in both spaces, pedagogical school vs. pedagogical science university:

> [Teaching at the university is] much better ... for the quality of students you get …. I taught at the university for three years and I never had disciplinary issues .... In the pedagogical school … you have to deal with problems in the classroom, … parents, and all that. I like to teach … university students.

Echoing what Juanita and Madiery described about their peers, he speculated that his students at the pedagogical school would not become teachers. He reflected on the common school preferences in Cuba: "You know that they are not going to be in school [teaching] because … when students finished middle school, they had different options: to go to Lenin[50], to the pre-university, and the pedagogical school was their last option." Coupled with that, he believed over the years studying in the pedagogical school, students become even more discouraged to enter teaching due to the lack of teachers in the pedagogical school, the practicum that exposes them to difficult situations in primary or secondary schools, as well as the low salary that is not fair for the amount they work. Given this dire situation for students to study in pedagogical school, he expressed his frustrations to keep them motivated. Later he revealed his intention to quickly advance to the next step in career:

[50] An elite high school in Cuba with an official name of Vocational Pre-University Institute of Exact Sciences 'Vladimir Illich Lenin.' Those who score above 85% in science and math then are in a position to compete for places in various pre-university schools or vocational technical upper secondary schools.

> I really can't keep them [students] motivated because, first of all, it is a lot of work to deal with 31 de-motivated students. It's hard work and I am not willing to do that because I don't want to be in that place. I am in that place because I have to be there for one year[51] in order to do something different.
>
> Sammara

Sammara graduated from UCPEJV in 2018 majoring in Foreign Language Education. She entered that institution because of her interest in language and not necessarily her interest in teaching as a career. She has been teaching private English lessons since her junior year and continues to teach privately without completing her three years of social service. Sammara indicated that she was not alone among her peers in making this decision: "There were 24-25 students who were not attending social service ... out of almost 100 graduates." Referring to those who dropped out without completing their social service, she explained:

> We studied with many people who did not identify themselves with the profession, who did not like pedagogy. Perhaps they were certain about not doing the social service even before. They had already experienced their fourth and fifth year teaching in schools. So, they knew what they were getting into…. Now what is worse, depending on the necessity of schools, [there will be more] responsibility [of teaching extra students and/or extra classes because there aren't enough teachers]. They will give you more work.

With regard to her own reasons, she outlined two aspects: first, she was assigned to a school for social service where she did not want to teach:

[51] Social service for men in Cuba is two years in addition to one year of military service. His plan was to complete his first year in the pedagogical school and move to UH as an English instructor for the second year. At the time of the interview he already received the offer from UH.

> I was not happy with the school where I was assigned [to teach]. It was a pedagogical school. I think pedagogical schools are … like our major but in technical-vocational level…. I am not so sure about the functions of those schools. Moreover, it is located in a place not so favorable. It is in Cerro, a municipality that is complicated, where students are also complicated[52].

In addition, she believed that not only was there a shortage of teachers in this institution, but the teaching quality of English teachers who were on staff was extremely low. To the question of whether she would complete social service if she were to be assigned to a school in Vedado:

> I would not be interested either because I taught in a pre-university in Vedado …. But it [the pre-university] is not any better to teach …. English teachers there are not well prepared …. I am not sure why they are bad teachers: their pedagogy is ok, but their language skills are bad.

What must be noted about Sammara is that she came to like teaching and continued to teach after her graduation. Yet, it occurred outside of the public school system. This decision was made based on two factors: First, in addition to above about the fellow teachers, her practicum in pre-university left her a negative impression on teaching in the public sector. She criticized that "[i]n the pre-university, [there are] forty something students [in one class]. Each class is [only] 45 minutes. Lesson plans do not match student workbooks. There is no TV or DVD to play. You can't [teach]!"

[52] She used the word 'complicated' to explain the context of students in the pedagogical school that they are not there to become teachers but because they could not make it to other pre-universities, reiterating the comments by Juanita, Madiery, and their English pedagogy teacher, Alonso.

In contrast, her teaching experience in the private sector helped her find her interest in teaching. When she entered UCPEJV, teaching was not her first choice, but she "came to like teaching after her junior year" while teaching English at a private home converted into classrooms.[53] She noted this experience helped her tremendously with the actual teaching skill.

> The university gave me the training of pedagogy and psychology but for the actual teaching, you need to [practice and teach.] You need to study the content. You may be able to speak [English], but to explain … and see how you can make [students] understand, this [private teaching] helps you a lot.

Sammara enjoyed teaching and committed to teaching in the future, whether be it "in or outside of Cuba." Sammara evidenced the challenges in teaching but expressed her enthusiasm for meeting and overcoming them:

> Pedagogy is a challenge every day because everyone is different ... everyone has a different story, everyone lives differently, everyone reacts differently, learns differently, assimilates differently based on what you [teachers] do. Not all will have the same understanding. So, you have to work with these particularities of individuals…. It is very beautiful but very difficult, if you want to do it well.

In the conversation about teacher exodus in Cuba, Sammara strongly argued for the salary that is decent and just, which she thought would prevent further dropouts from the public school system. Though not explicitly outlined as one of her main reasons, low salary of public school teachers was frequently raised and seems to have played a central role in her decision not

[53] This informal arrangement through a network of English tutors mimicked private language institute. She called the owner of the house and a fellow tutor, *Jefa*, which means boss in English.

to do her social service – and, thus, continue in a teaching career. She described public school teacher' salary to be "unjust," "inhumane," and "negligible":

> Here [in Cuba] no teachers in the public system, … [regardless of whether] you have a master's or PhD, ... have a real benefit or a benefit that is just. I dare to use the word, just, because of the hours they teach, the research, the work, the effort, and so many other things they do. Beyond just, I would say [that a teacher's salary is] inhumane. I don't know how to describe it. I think the word should be much stronger...Because teachers are the engine that keeps society moving and prepare all the professions in the society. Without teachers, nothing is possible. Then how is it possible, given that they put so much effort, they receive such negligible benefits?

Coupled with the low salary, she noted that the high living cost in Cuba made things more difficult. She referred to the daily items such as a bottle of olive oil, toilet paper, a bar of soap, which with 20 CUC of teacher salary were impossible to buy on a regular basis. Sammara sounded furious when discussing the following:

> [For example,] a bottle of olive oil. The cheap ones you can get it for 5 dollars. You can even get a bottle of sunflower oil that is 2 dollars or 2 dollars 50 cents…. Say you do not fry food, then [good,] you don't even need cooking oil. But I'm not sure if you can live without a bar of soap or toilet paper. Like [these are] basic things! …. You go to a farmer's market and everything is so expensive. It is not only expensive for teachers. I don't think any professionals in Cuba can live off of their own salary. No professionals in Cuba can live off of their salary. With their actual salary, you cannot maintain home, let

alone a proper family. It is not logically possible. You cannot do it, unless you do magic. It is impossible.

Matias

Matias graduated from the Faculty of Foreign Language Education at UCPEJV along with Alonso and Sammara in summer of 2018. After graduation, when he was also assigned to the pedagogical school in Cerro, he decided not to do his social service. His case was different from Sammara in that she came to like teaching during her engagement in the private sector and pursued the career related to her teaching degree yet outside the public sector. Unlike Sammara, Matias abandoned teaching completely, whether that be in public or private sector. He sometimes felt that he "wasted [his] time" in UCPEJV. At the time of the interview, he was making a living by building and selling furniture online.

Matias was an example of classmates who "did not identify themselves with the profession" (words of Sammara) and were "there to get a bachelor's degree" (words of Laura). He blamed the university assignment system that forcefully put him at the pedagogical science university, despite it not being his preferred choice. Because of the strong push from his family, however, he stayed until the graduation:

> I wanted to choose the University of Havana but couldn't because of my scores [in the university entrance exam]. So, what I was able to choose, among the ones that were left, was this [pedagogical science university]. It wasn't a profession that I wanted … that I really liked, but you know, family members always say, 'you have to have a [bachelor's] degree.' So here I am. I finished my degree.

Matias was also an example of peers described by Laura and Sammara, in that he reported that he lost interest in becoming a public school teacher after realizing the low salary (noted by Laura) and difficult situations in schools during the practicum (noted by Sammara), both of which he labeled as a "reality hit." He sounded infuriated:

> After I graduated, I did not enter [public school teaching]. I was struck by the reality, struck by a series of things, you know. The salary is very low for us, very low. If we were to compare it to other countries, for example … would be twenty American dollars per month. It is so low you cannot think. You cannot think to do anything…. So, I didn't want this to happen to me. This is why many people try to escape [from Cuba] and emigrate to find a better solution …. Youth do not want this. Youth today will not conform to this. Moreover, it [teaching] is a job that you teach, struggle with students, have to have much patience, … have to work at home planning [for class]. It's a tough job.

Regarding teaching itself during the practicum, he said that he "cannot deny, it was good." However, Matias was discouraged about the lack of instructional resources, outdated materials, and most importantly, was distressed about the lack of professionalism and corruption in the school community. That is, "an inflation of the reality" rampant in the school culture because of the problem of "promoción" or mandated grade inflation:

> There is no professionalism because you grade [a student] and …. they [those who work in the head teacher's office] say 'put another grade' and change [it] completely. So, I stopped going [to school] and started missing [classes]. I became another person. This happened to me in the fifth year, because of the problem of promoción [i.e., grade inflation]. Because there can't be any bad grades. That is, if a student scored 'Regular'

> you have to put ‘Good’ …. What reaches above [the leadership of the country] is the message that ‘everything is good,’ when really it isn't.
>
> Humberto

Humberto graduated from the pedagogical science university in Santiago de Cuba in 2014, majoring in Foreign Language Education. He entered the program because teaching was his first choice, and he wanted to become a teacher for “its prestige in the society.” He also mentioned that many of his family members were teachers. During the program he had practicum experiences teaching English in a secondary school in Santiago de Cuba, and this experience reinforced his desire to work as an educator. As part of his social service, he taught English in public middle school in Santiago de Cuba for a year, but then relocated to Havana in 2015 to teach English in public middle school. After only four months on the job, he became a supervisor of the English subject in a municipality in Havana and later started his master’s in Foreign Language Education at UCPEJV.

Based on his role as supervisor observing and supporting English teachers in his municipality, he noted that dropout from the profession, even before completing preservice training, was a serious problem. And he emphasized that this was more of a problem in pedagogical schools than it was in the pedagogical science university:

> There are students who mistakenly choose this career [teaching], and when the reality hits, they feel that it is not really a profession they should exercise. So, the enrollment is often elevated [in the first semester] but when the second semester starts, it tends to decrease, and by the end of the program, only 40 to 60% enter [employment or social service as

teachers] …. This does not happen in the pedagogical science university. [The retention rate is] almost 80%.

However, retention in and completion of the pre-service training program does not necessarily equate to entry into employment as a teacher. To the graduates of the pedagogical science university who avoid doing social service, he explained:

> It has been years since they [the Ministry of Education] said completing social service is obligatory; otherwise the [bachelor's] degree will be invalidated. From my point of view, … there are many graduates who do not complete social service and work in other institutions [private sectors] and nothing happens.

In the discussion regarding the teacher coverage in two provinces, he argued that there is less deficit of English teachers in Santiago de Cuba because it does a better job orienting students[54] to the profession compared to how it is done in Havana:

> [There is less deficit in Santiago de Cuba] because the province guarantees teacher training with professionalism and does an exquisite job of professional orientation compared to how it is done in Havana. Students in middle school fall in love with the subject [English] and attend pre-university saying that they will become English teachers. When they graduate, they major in Foreign Language at the pedagogical [science] university, so the province secures them, doing more appropriate work compared to Havana.

[54] In the follow up interview in October 2019 with Humberto, he disagreed to the possibilities of less job opportunities in Santiago de Cuba (compared to Havana) being associated with the less drop out of teachers in the province. He was a firm believer that it was the program in Santiago de Cuba that did a better job orienting students to become teachers. During the interview he also noted he completed his masters with a plan to continue to Ph.D. and at the same time work as a Supervisor of English in his municipality.

7.4 Teachers and former teachers who entered teaching in the 2000s

This group includes four teachers and former teachers who entered teaching in the 2000s. Marcelo and Jesus entered teaching in 2007 and at the time of the interview were teaching in a middle school and a high school, respectively. Angela and Pablo started teaching in primary school in 2005 and 2002, respectively, after a short training without a pedagogical school diploma or a university degree and, in 2018, were working in the private sector.

Marcelo

Marcelo is originally from Granma and moved to Havana to participate in the Emergency (*Emergente*) program to get his bachelor's degree in Comprehensive Middle School Teaching (*Profesor General Integral, PGI*). After graduation, he was sent to middle school in Vedado in 2007 to teach multiple subjects as a PGI, and in 2018 he had a master's degree in History from the University of Havana and was teaching Cuban history and civic education in the same school (see Chapter 4 for more information on PGI). He received his parents' support on the decision to move to Havana because "it involved getting a college degree and was a good opportunity."

In the discussion about the proportion of teachers like himself who moved to Havana from outside, he answered "it is relative [to each school] ... ranging from 50 to 80%." In his school, however, the number of teachers from outside does not reach half and there has not been much change in the teaching staff during the past 12 years, which brought prestige to school since the stability "guarantees the quality of learning":

> [Teachers in our school] have not changed. It is one of the reasons why everybody wants to go there [i.e., parents want to send their kids there]. The school is known for its

stability of teachers. There have been some changes [in teachers] but there are few who left and returned. But everyone [every teacher] stays.

Behind the school's prestige stands the head teacher who was highly respected and well received in the education community in Cuba. Marcelo had a high regard and deep respect for her, and thanked her for making him feel professional:

> [She is] a teacher and an exceptional leader because she challenges us [teachers] and at the same time is flexible with us …. She earned so much love and respect from her students because those who left the country, when they visit Cuba, the first thing they do is to see her…It says so much about her. For us [PGIs in this school] … she helped us incredibly with our preparation because when we graduated from the university, we had another university with her …. We had to show that we were preparing ourselves …. This is why many people say, 'Teachers of Fray Teodoro!' We stand out because we are well prepared…. She was a critical person to our professional preparation …. Particularly me, I thank her because she allowed me to go beyond average [in teaching]. I feel so, beyond average.

Regarding the new salary policy in 2016 that provides incentives to teachers who teach additional hours and more students (see Chapter 4), Marcelo noted that it was affecting each teacher differently. For some, it served as an incentive and they returned to teaching, and for others, their economic needs were too great that they could not afford to come back. Regardless, Marcelo firmly believed that for teachers who left, it was because of their economic needs not because they thought "the profession is bad." For Marcelo, his love for education and the teacher

profession as well as the recognition he received by being associated with Fray Teodoro, trumped his economic needs; thus, it made more sense for him to stay than to leave:

> It [the occupational decision] is subject to each case.… I do not have much economic needs and I like education but if I am in education and I have economic obligations, I have to leave …. I cannot speak on behalf of everyone … life is different for everyone …. Perhaps I do not need [money] and I stay.

Jesus

Jesus would be the opposite of Marcelo in the sense that he was always on the move and searched for positions with better payment. He moved within the public sector by exploring opportunities across subsectors (in and out of education) and outside, within the private sector, sometimes utilizing his Bachelor's Degree in Mathematics and Informatics and other times engaging in the "gig economy," like selling cell phones and baby strollers and helping out moving. In December 2018, at the time of the interview, he had returned to teaching after six years and was teaching mathematics in a pre-university in Cerro.

Jesus graduated from the pedagogical science university in Havana[55] in 2007, majoring in Mathematics and Informatics. He entered the pedagogical science university based on the recommendation by the teachers at the pre-university. No other career options available at the year of college application intrigued him. He initially aspired to enter the Foreign Language Education program; however, he confused the date of its entrance exam and missed it. Mathematics and Informatics education was his second option and he was admitted fortunately. After graduating from the pedagogical science university, he completed his social service by

[55] At the time, the institute was called *Instituto Superior Pedagógico Enrique José Varona*, which changed its name to *Universidad de Ciencias Pedagógicas Enrique José Varona* in 2009.

teaching in a high school in the countryside for two years and moved to the Center for Software Education located within the education complex which included teaching 10th grade informatics in a nearby pre-university (2009-2012). He first left education as well as the public sector, due to its conservative nature – i.e., its resistant to change – and because of his thirst for better financial rewards:

> Really, we were comfortable there, myself and other teachers who worked with me. But I started having other perspectives [in life]. Maybe, our ideas were not heard. They [the leadership] maintained the way, 'this is how it is done and just do it that way.' We wanted to create. There was no feedback. So, in some ways, given that we were professionals, it struck us to explore the possibility to do new things. Added to this was a search for an economic betterment. A few colleagues and I decided to leave the Center as well as the field of education.

Jesus noted that the main medium to explore opportunities in the private sector was through a website called *Revolico*. It was managed in Italy, away from the control by the Cuban government, and therefore allowed a hosting of black market, displaying services and products that were illegal in Cuba, such as selling visas and stolen phones and arranging prostitution. He recalled one year when he was "officially" unemployed – his employment was not registered in either public or private workplace – yet he gained more income than ever by finding jobs via listings on Revolico.

He decided to return to teaching in late 2018, taking into account the unstable work in the private sector and the benefits that the state system brings. His main motivation was to explore the possibility and build an occupational model of combining teaching in the morning and

engaging in gig economy and/or tutoring in the afternoon[56]. He outlined the mechanism how he and other contemporary Cubans approach the state system:

> I didn't have work every day. So, I started looking at the state system differently. I knew I could not teach 8-5 [because I want to work in the private sector, too] and maybe I could teach 8-5, if I don't have to show up every other day. I was thinking 'how can this sector [i.e., the public sector] accommodate me, what are the advantages?' Here, Cubans try to seek within the state system the kinds of advantages that the public sector brings.

He outlined the benefit of the public sector to be "less demanding" compared to the work in the private sector, to "stay employed which allows for recognition in the society," as well as to "accumulate years towards retirement" which for men requires 30 years of working. With regard to the employed status, he alluded to the social stigma that:

> People approach the public sector with the intention to stay employed because[, if you are unemployed,] others can see you like a social parasite or someone that does not contribute to the society….They ask you 'how do you survive?' They assume that you are not doing something correct in the society [if you are unemployed].

After a month exploring the combination of teaching in school and working in the private sector and "calculating the economic return," he decided to leave teaching again at the end of the semester. His plan was to search again for the opportunities on Revolico and engage in a gig economy. Jesus identified the following reasons his decision to leave public school teaching at this point:

[56] This combination is illegal for Jesus, because according to Gazette in 2010 (See Chapter 4), it is only permitted to language teachers.

> First the curriculum is tight [i.e., much content to cover], second the time [45 minutes for a class session is not enough], and the other factor is teaching. I need to address the different learning styles of each student and follow up on their progress, but I have 120 students! So, this is why there is a private tutor … they have five students, not 35 in each class.

In addition, Jesus stated that students' lack of interest in math and lack of respect for teachers added more complexity to the already troubled system of high school math. He referred to his high school students in Cerro, the municipality where (as mentioned above) Sammara and Matias feared to teach:

> Students are not fully engaged in learning the subject. Students are spoiled…they became accustomed to being fed and do not study …. Teachers push and push them to study, yet they have to give out grades [because of promoción, i.e., grade inflation to enhance school performance]. So, the system trains and un-trains [students] with this [contradictory] approach.... Then you enter the class and realize the knowledge that you assumed they had [was wrong]: they don't even know how to multiply. So, you have to go back a few grades to start reviewing. This runs against the quality and the [limited] time in teaching.

Jesus also identified other factors that discouraged him from continuing as a public school teacher – the culture driven by school performance and the amount of required paperwork:

> The priority goes to whether the teacher was present in class all week, rather than whether students learned. We have to make tests easy [so students can get good grades and thus enhance the school's performance]. There are more and more paperwork and

> checklists of whether things are done rather than [whether] students learned. This is what is happening and nothing's new. I keep seeing the same thing since years ago.
>
> Angela

Angela started as a teaching assistant in a primary school in 2005 after receiving a short training required for teaching assistants. She recalled, "nothing allowed me ... to work near home, so I took advantage of it [i.e., working as a teaching assistant]." At the time, as a single mother with a five-year-old daughter, it was crucial that her workplace be near home. After working in a primary school for three years, she enrolled part-time (afternoon/evening program) in the Faculty of Foreign Language Education at UCPEJV while teaching English as a full-fledged teacher in middle school from 2008 to 2013. She entered the teacher training program because she "always liked English … [and] wanted to be a university graduate." She also commented that many of her peers in the course worked in the military and signed up for the course for a "fast promotion and better payment."

Reflecting on the years studying part-time at UCPEJV, she felt like a second-class student compared to the full-time students:

> The quality of classes actually is not the same …. Full-time students receive more benefits [than the part-time students] .... They take the class, Integrated Practice of English, more frequently … It is true that they have better … professors. They have more variety [of professors] …. And even internet access, we [part-time students] don't have it.

After graduating from UCPEJV, she was able to leave teaching in the public system, with the years of her work in the middle school counted toward satisfying the social service obligation. Her reasons for the departure overlapped with many of those identified by the other informants:

"lack of teaching materials," "unjust salary," and "bad student behavior." What stood out for her more than others was the "lack of support from colleagues." In other words, she was not part of the support system that Marcelo enjoyed and kept him in the public school system. Angela commented that it was difficult for her to work with colleagues in middle school where she taught, especially with the head teacher who came from another province:

> It [teachers do not help each other] is the reality and it is sad. It is what happens in my country. It is true. Teachers do not help each other. The head teacher is shameless. He is an opportunist … He is someone who came from the province [outside of Havana], does not want to teach and does not have any motivation to teach. They [Ministry of Education] just put him there because his [old] friend from the province that he comes from put him there as a head teacher. He does not have the capacity [to manage the school]. Nothing.

Since 2013, she had been exploring opportunities in the private sector. She worked in an office with a good salary, yet she "missed being in the classroom, the communication and feedback from students." This led her to teach English in a private home converted into classrooms with an informal network of English tutors, and there she enjoyed working: "There my life changed, and we were in harmony, all the teachers. Everyone got along. There was no problem."

Pablo

Pablo graduated from Lenin pre-university (see section on Alonso for more information) in 2002 and took a short course at a technical vocational school to teach informatics in primary school. He taught in a primary school from 2002 to 2005 while enrolling in a part-time course at the technological university in Havana. Similar to how Angela complained about the low quality

of education in the part-time program, Pablo recalled that, "[the courses were] too easy, so we can graduate and continue to teach in schools. When I realized this, I quit teaching [dropped out of the program]." Instead, he enrolled full time in the technological university and studied Information Technology Engineering for two years, and before graduating, he signed up for a course to teach programming in pre-university. From 2008 to 2012, he taught informatics to the 12th graders and later left teaching in both public and private sectors. Since 2013, he has been enrolled in University of Havana majoring in economics, and at the time of the interview in 2018 he worked as a waiter in a restaurant in downtown Vedado, Havana.

When he was asked about the reasons why he pursued a career in teaching, he responded that it was because of his love for teaching and working with kids:

> I loved teaching. I loved teaching kids .... the ones in kindergarten who had never touched a computer before and when they see it, they get really excited. It's really easy to work with them because we teach them through games, lots of games, and at that age, it is not so important to teach a specific content, but it is more about developing psychomotor skills to use computer and familiarize them with the interface.

Though he enjoyed teaching in primary school more, he grew professionally as a teacher while he taught in a pre-university:

> The experience that helped me become a true education professional was teaching in a pre-university…. I had to study, continue to professionally develop himself, and deal with complex situations … like teaching programming to 17 years olds [with disciplinary issues].

Pablo left teaching in 2012. Out of all the jobs he had, he admitted that his favorite was teaching. However, he "could not dedicate full time because of the fundamental discouragement that came from the [low] salary." Pablo spoke to the point argued by Marcelo that those teachers who left did so because of their economic needs, not because "the profession is bad."

Ever since his departure, Pablo had been constantly switching jobs within and outside of the public sector to make ends meet, similar to how Jesus was always "calculating the economic return". As a result of this exploration, he concluded that "the only place you can make enough money to live with dignity is to work in the private sector." For example, from the restaurant where he worked, he was getting paid on average 15-20 CUCs a day which was approximately a monthly salary for teachers (see Chapter 4). The arrangement with the employer was that he kept 1% of total revenue that the restaurant made that day which required him to work 14 hours a day, 15 days a month, and only getting paid for the days one works.

Though it was a good pay, he called this experience to resemble "slavery." He explained that there is no legal framework or a workers' union to protect employees in the private sector and mediate the contract between employers and employees in Cuba. In fact, on the day before the interview, the owner of the restaurant fired Pablo "for taking [his] cell phone out and saving a number of a friend [to organize the transportation back home after work at 1 am]. He said, 'Today is your last day,' [And fired me] for a ridiculous or ironic reason." Pablo, drawing upon his backgrounds in economics, interpreted this incident to be the manifestations of immature capitalism and social chaos in Cuba:

> Cubans are new to the management of private property, the management of, let's say, a small company…. [In Cuba,] there is no course on the management of human capital and

> certain things that are necessary when you manage a company, [like] the conditions for capitalist production which is the case for this type of business [restaurant]. And this is why they [business owners] make this kind of mistakes [firing employees for insignificant things] …. You don't want to let go of an employee who you trained, for such a simple thing. You need different management strategies.…We live in Macondo.

To Pablo, Macondo, from the book *One Hundred Years of Solitude*, reminded much of Havana reflecting on the identity crisis and crashing moral value that the city was going through. He contrasted contemporary Cuba with the Special Period, when in both times the country suffered economically, yet now it is suffering culturally as well. Reminiscing the time during the Special Period, he noted:

> I was six years old in 1989 when the Socialist camp collapsed, [and later did] the USSR, which [had given] the country much economic support. The Cuban economy changed a lot … the buses ran every five hours, we didn't have electricity for hours, we didn't have gas to cook, … and we didn't have food….Regardless, we were all happy, because people, my family and my friends from the neighborhood were happy, kind, and educated, and there was always healthy environment for children to grow up.

In contrast, he witnessed the collapse of the moral values on a daily basis in recent days. He expressed his sadness and showed his tears:

> In recent years, I see the youth, I ran into them on the street … and we talk and [I find] the environment [culture] we had is becoming rare.… You get on a bus, in these days, [if] there is an old lady standing and there are 4 or 5 men [sitting], nobody stands up to give up the seat. This did not take place ten years ago…. girls on the street wearing clothes

> that look almost naked, work on prostitution and had lost their [moral] value. I can tolerate all the economic constraints that I have as a Cuban, but what I cannot tolerate, what makes me feel bad, what makes me feel sad, is what always made me feel Cuban …. This capitalism we lost economically, I can resist, but [what we lost] culturally, no. I do not feel that this is my country. This is not the country that I have lived in all my life. What was the great value we had as Cubans? It is the people and it reached the point where I cannot tolerate any more.

Pablo confessed that given the rising social anomie and economic constraints, coupled with "the leadership that does not care, even if its people starve, as long as they keep money in their pocket," he had been saving money to fly to Europe and move to Spain for a better future:

> The fundamental decision for the reason why I want [to leave] is because … I want to build a family and I do not want my son to grow up in a county like this and in addition go through all the economic problems that we have and structural problems like transportation [an indication for him that the leadership in Cuba does not care about the wellbeing of their people]. I never wanted to leave but I have to do it…

7.5 Teachers and former teachers who entered teaching during the Special Period

Four informants fell under the category of teachers and formers teachers who entered teaching during the Special Period (the 1990s). Rodolfo and Eleonora entered teaching in 1992 after graduating from the pedagogical science university[57] in Santiago de Cuba and Havana, respectively. Rodolfo at the time of the interview worked as a supervisor of English subject in the municipality of Vedado, and Eleonora was a housewife after leaving public school teaching

[57] At the time, the institution was called Higher Education Institute of Pedagogy (*Instituto Superior Pedagógico*, ISP).

in 1998. Veronica and Diana both entered teaching in 1989, having graduated from the pedagogical school and pedagogical science university[58], respectively, and continued to teach in primary schools as a 2nd grade teacher and an English teacher in middle school, respectively.

Rodolfo

Rodolfo graduated from the pedagogical science university in Santiago de Cuba in 1992, majoring in Foreign Language Education. He started teaching English mostly in pre-universities and technical vocational schools in Santiago de Cuba until 2007, when he was transferred to the province of Havana to teach in pre-university in the countryside[59]. He was relocated "due to teacher shortage in Havana," when "the Ministry of Education proposed teachers [from outside of Havana] to come here [Havana] and informed that it was an internal mission within the country to contribute to the shortage and cover for the [unfilled teaching] positions in the [province of] Havana. [Generally,] teachers come here and stay forever."

With regard to his transition to Havana, he recalled the experience to be "the worst years of his teaching career." The hardship came from two main sources: the pre-university in the countryside that was understaffed as well as the school culture in Havana that was distinct from Santiago de Cuba. Regarding the former, he complained that the pre-university in the countryside was always short-staffed and 16 teachers (11 from the eastern provinces[60] and 5 from Havana) had to oversee 400 students who lived on campus. When "teachers from Havana left and abandoned the [public] education system," there was even more shortage of teachers. At times, there were only two teachers in the night shift monitoring the dormitories of 400 students. Rodolfo, however, considered the latter source of hardship to be more serious. He explained:

[58] At the time, the institution was ISP.
[59] This program removed in 2011 for costly maintenance and lack of efficiency (see Chapter 4).
[60] The provinces included Las Tunas, Granma, Holguín, Santiago de Cuba and Guantánamo.

> It was more difficult because one needs to adapt oneself being a teacher [in Havana] which is not the same [as being a teacher in Santiago de Cuba]. It is not always the same. Teachers there, based on my experience, are more demanding than here.… There, there is less compromise. Teachers compromise less with students compared to here…. They are strict. [Students] cannot fail [to meet the expectation of the teachers]. Here, there is more flexibility. Teachers are more flexible here [with students] and school leaders are more flexible here [with teachers]. One of the reasons is because given that there aren't many teachers, if they [school leaders] are demanding, they [teachers] leave.

Due to teacher exodus in Havana, there was a strong presence of teachers from the eastern provinces in Havana. Rodolfo explained that in the municipality of Vedado, where he supervises, in middle schools "more than half of the head teachers and almost half of the regular teachers are from eastern provinces because [the teachers from] Havana alone cannot cover the students enrolled [and] cannot cover the teacher shortage." He also added that "headteachers and [deputy headteachers] are from eastern provinces because teachers from Havana … do not want to be in charge of these positions." This comment hinted at the possible conflict – or at least non-collegial relations – between the teachers from Havana and those from outside of Havana, a situation which was in line with Angela's complaint based on the lack of support and disappointment expressed toward the headteacher in middle school where she worked.

The phenomenon of teacher shortage was less pronounced in his municipality, Vedado, compared to the other municipalities because "everyone wants to be here. Thus, it is easier [to recruit when there is a teacher shortage because] teachers quickly want to come to Vedado because it is the center of the capital [and thus] the country." In other municipalities in Havana,

"there is only one [English] teacher covering three grades ….so [teachers] are overloaded with work." To the question whether this heavy workload, due to the teacher shortage, encourages teachers to leave, Rodolfo answered:

> Yes, because teachers are tired, they are exhausted. They are really overloaded with work…There is a national policy in Education that now the government pays for the extra work [of teachers]. [The policy began] two years ago…. However, it [the shortage of teachers and the exhaustion of the teachers in schools] is compromising the quality of the class.

In addition to the heavy workload of teachers, Rodolfo believed that multiple channels of becoming teachers, especially through the Emergency program (see Chapter 4), damaged the teacher prestige in Cuba and negatively impacted the quality of public education. He argued:

> A variety of teacher [profiles] that the country has now – [the country] had to prepare Emergency teachers – degraded a little the prestige of teachers, because not all of them have the quality and the [necessary] preparation to become a [competent] teacher. They entered the [education] system and what they have done is rather bad than good. And this reduced the quality of education [in Cuba].

With regard to the graduates of pedagogical schools, he also expressed concerns in terms of their quality as teachers but explained measures in each school to have a mentor to guide their first steps:

> There are many graduates who are good [teachers] but [equally] there are many graduates who are not good. This affects a little bit the quality of education. But when they [the

> graduates] are assigned to schools, they are not alone. They always have a mentor, a teacher with bachelor's degree who can guide, teach, train, and advise them in school.

Similar to how Rodolfo paired solutions to the identified problems in the public education system in Cuba, he stayed positive and added, "Cuba always finds a way to adapt to the situation" and believed in the resilience of his people:

> Us, Cubans, due to [difficult] situations we've always had in this country, we are very adaptable. We adapt ourselves easily to the difficult situation, a complex situation…. Because we have lived all our lives adapting ourselves to the difficult situations.

In contrast to the years in pre-university in the countryside, Rodolfo indicated that his time in Angola was "the best years in his life" when he taught English in the local pedagogical university from 2011 to 2014. He recalled: "It was a good experience because we were there in a country where they lagged behind in education and we were able to do many things they didn't have." Financially speaking, he was also able to buy a house in Havana with the salary he saved from teaching in Angola. He made 550 US dollars a month compared to teachers' average salary in Cuba which was 22 US dollars in 2014 (ONE, 2017b). He proudly said, "if I were in Cuba, I would have been rich, a millionaire." To the question why he did not leave for a better paying job in the private sector, he shared two main reasons: unstable salary and his love for teaching.

> Many jobs you get when you leave teaching are part time. People like to leave for tourism…. I am not interested in tourism. It does not catch my attention because there is no stability in salary. And I also love what I do. If I made [enough] money, if I were to have a good salary, I would die for being a teacher.

In fact, Rodolfo agreed to the low salary of teachers, which led almost all informants in the previous categories to express their frustration. He made 710 CUPs a month as a supervisor of English subject in Vedado (equivalent to 30 US dollars), which was even less than what middle school English teachers made in a month (e.g. 900 CUPs, 37 US dollars). However, his approach was distinct. Given his love for teaching, he was able to adapt himself and planned his spending around the salary he was making, rather than leave the public education system like how Sammara, Matias, and Pablo did:

> Many times, we work more than what we make [in salary] … Well, it is part of the resignation. We are already accustomed to this and to work like this [relatively less salary for a heavy workload] …. Each Cuban is an economist. Each time you receive your salary, you need to say, this is for this, this is for this, this money for this, until you exhaust all. If not, I have to look for other sources of income.

Rodolfo, however, in his previous years, attempted to leave for the private sector and considered leaving the country, yet failed to do so due to his strong attachment to the public education in Cuba. In tears, he noted the following:

> For me it is extremely difficult to leave [the public education system and the country]. To make that decision is difficult because I feel nostalgic, I don't know. I feel the nostalgia to leave something that I spent so much time and to leave, I feel nostalgic…. I wanted to make that decision multiple times and I haven't been able to do so.

Eleonora

Eleonora graduated from the pedagogical science university in Havana in 1992, majoring in vocational education and technical drawing, and taught vocational education in a middle school in Havana until 1998. Eleonora decided to enroll in the pedagogical science university during her last year of pre-university "based on [her relatively low] average score [in the university entrance exam]." She initially wanted to pursue a career in medicine, but she decided not to because she "cannot see blood." Instead, she entered the pedagogical science university majoring in vocational education and technical drawing "not so much because I wanted to become a teacher, but because I like to draw."

In 1998, after her daughter was born, Eleonora was on maternity leave for three months. After three months, she could not return to teaching because she had to take care of her daughter who had severe gastric reflux. Eleonora said, "[my daughter] was malnourished until she was 4. I could not leave her in the kindergarten." Her daughter at the time of the interview grew up and lived in Miami with her father, Eleonora's ex-husband. Her daughter, in fact, dropped out of the Foreign Language Education program at UCPEJV (along with Laura and Luana) and moved to the US in 2017. To the question why she continues to stay out of teaching in the public education system, Eleonora answered, "I have already lost the [teaching] experience. I also have another son. Life has moved on."

With regard to the multiple social phenomena that involved teachers in Cuba, Eleonora sounded indifferent or noncommittal at best. In fact, the overall impression of the interview with Eleonora was that she felt uncomfortable discussing the topic of teacher shortage. For example, in relation to the teacher exodus in Cuba which had been around for the past few decades, she

argued that "[it is] normal. People can leave teaching. [Just like how] people leave engineering. People leave. [It's] normal." When asked about her thoughts about whether the public perception of teachers has declined, she simply answered, "No. Even the teacher salary is better [than the 1990s]." Her answers, combined with her financial status, assumed based on the wealthy area she lives; her status as a housewife depending on the salary of her husband working as a salesperson; as well as the high possibility of receiving remittances from her daughter and brother in the US can be speculated in two ways: either she is isolated from the everyday struggle of Cubans or she is circumspect of sharing her honest opinions in the interview.

Veronica

Veronica entered a pedagogical school when she was fourteen years old and, after she graduated, started teaching in 1989. While she was teaching, she enrolled in the pedagogical science university in Havana and received a bachelor's degree in Primary Education. At the time of the interview, she had been teaching in the same primary school in Vedado for 29 years.[61] For her reasons to enter teaching Veronica explained:

> I had always wanted to become a teacher since I was little. I always loved it [teaching]. My mom worked in a school[62]…. When I was in the sixth grade, I helped the teacher in the 2nd grade to take care of her students…. I was always in the classrooms of the younger grades helping out teachers.

[61] Reflecting on three decades teaching in the same primary school, she recalled that, "when I started [in 1989] right during the Special Period there were teachers, teachers with much experience. All teachers were experienced in our primary school. It was not until the 2000s when they decided to leave…. [The teacher exodus] has not stopped since and it is growing."

[62] Mercedes, who taught in the same primary school and participated in the interview with Veronica noted, "She was raised in that [school] environment."

When Veronica was asked about the aspects in teaching that motivate her, she sounded discouraged and noted the only incentive was the relationship she has with her former students:

> Nothing. The only incentive [of being a teacher], I don't know, would be to teach them [students], and when they grow up, they remember you, and they come and see you and say, 'my teacher!' This may be one incentive. Because material wise, teachers do not have any [incentive].

Veronica outlined throughout the interview the factors that make teaching challenging. First, she argued that "educators are not well remunerated." What made this group of informants different from those in the previous groups is that they agreed that the education and health are the two sectors that are highly paid in Cuba, a comment never made by the previous groups of informants, yet they still complained that their salary "is not enough" (Rodolfo) or "education has always been not well remunerated" (Veronica). Only Eleonora, who left teaching 20 years ago, touted the teacher salary. Veronica added that it is not just the low salary, but the high living cost in Havana which makes it more difficult for teachers to make their ends meet. Referring to her colleagues, she noted:

> Sometimes teachers have to have … another job…. After school, they clean houses, iron, and wash [clothes], to have a little more money, to have a little extra money, because the [teacher] salary does not cover [the basic costs].

In addition, Veronica shared that the lack of respect toward teachers, which originates from the lack of discipline and moral values in the household, makes it more difficult for teachers to manage the classroom:

> The values are lost in this country. And this [lost value] is inculcated in children from the household where education begins. [In fact,] what we do is to reinforce [the values]. To inculcate these values, when the school and household do not share the same, we are lost.

In fact, the relationship between teachers and parents has evolved in complex ways, as teachers now rely heavily on parents' material support due to the lack of resources in public schools in Cuba:

> When a parent helps to put a lamp, paint the classroom wall, bring materials needed in the classroom, there is a problem because, later, they believe that they have the rights … to ask [teachers] for their son to receive a better treatment.

Despite the difficulties, Veronica had stayed in teaching for almost 30 years because she liked the profession and had dedicated her entire life to this career. However, she felt it was time to leave for another job, outside of education, before she becomes too old:

> [I stayed in teaching because I love] my job. Moreover, I have done this all my life. Now, I have to face [the reality and look for] another job. Also, considering my age [it will be more difficult to get a job outside of education if I leave later] …. I love my job but when my kid graduates from primary school, I will leave teaching. I don't know where to go …. [Perhaps] look for another job … outside of [public] education.
>
> Diana

Diana graduated from the pedagogical science university in Santiago de Cuba majoring in Foreign Language Education in 1989. When she was young, she did not want to be a teacher. In fact, she wanted to be an interpreter. She believed that it was her fate that she was meant to be a teacher: "well, it [teaching] came to me." Referring to her occupational choice, she noted, "It

seems that there was something [about teaching] that I liked, and I stayed. Because I could have left for tourism." After she graduated from the pedagogical science university, she taught English in middle school in Santiago de Cuba until she moved to Havana in 1997. She explained:

> I wanted to move to the capital city. Everybody does. [It is] where the development is, where everything is easier. There [in Santiago de Cuba], I worked in the countryside. I had to walk under the sun and now I don't. I just wake up, get on the bus, and get to school.

The first year in Havana she did not work because "I didn't want to … and looked for other things [jobs] but earned less money [than teaching], like cooking." After that year, she came back to teaching and taught English for few years in the same primary school where Veronica and Mercedes teach and later was transferred to a middle school "because there were no [English] teachers in middle schools." At the time of the interview, she had been teaching English in the same middle school for almost twenty years, where Marcelo was also teaching. Diana acknowledged the difficulty of transitioning to the school culture in Havana, yet her transition seemed smoother than Rodolfo's:

> Whenever people recently move to a city [Havana], even kids recognize that they are from the countryside [outside of Havana] by the way they talk. However, I had already worked in middle schools there [Santiago de Cuba], [so it was not too difficult].

Diana identified her students to be the main motivation of teaching for her: "it [dealing with students] is a struggle but I feel happy with them, because on the day I don't go [to school], I am bored at home and I prefer to be there [at school] wrestling with them." She also outlined some of the challenges in teaching which largely overlapped with those by the previous

informants. For example, Diana noted the lack of respect toward teachers as one of the main challenges and added that it not only comes from the lack of discipline in the household, but the system that grants education for free in itself encourages "students to not make most out of the class." Diana's salary as a teacher was low and, therefore, she "was economically dependent on him [her husband]," who was a construction worker in the private sector. She argued that the salary is one critical factor that determines the occupational decision making of teachers:

> Most teachers leave because of the salary problem…. Because if they [Ministry of Education] increase [it], even [more], the retired teachers will come back to school again. The problem is the salary.

To the question whether she thought about leaving teaching and changing her profession, she replied:

> I thought about it, but I don't anymore [think about moving] to anywhere [different]. I am 52 years old. Most jobs [in the private sector] require up to 35 years old. I will stay here [teaching in the public sector] until I retire.

Diana, in fact, sounded regretful for not searching for better opportunities in her younger days. Her comments quoted below mirrored the conversation that Laura had with her mother who was a middle school English teacher:

> Look, I wish I were young, so [I could search for other career opportunities] … I tell my daughter 'what happened to me was that I did not search.' Because perhaps, if I had searched [for other opportunities] in Havana and I would have been like her: how she left medicine and now she is in tourism. I arrived [to Havana] and stayed in schools and did not search [for other career opportunities]. Perhaps that is why I was stuck. Not to be

stuck, but I stayed in the same job. Perhaps [if I had actively searched for other career opportunities,] I would have been somewhere else. I would have made more money.

7.6 Teachers who began their employment between 1972 and 1987 before the Special Period and either had or had not retired

This category includes three teachers who entered teaching before the Special Period, between 1972 and 1987, and had or had not retired. Two teachers were still in service: Elena worked as the headteacher in a primary school and Mercedes taught preschool in a primary school. Emiliana first retired in 2008, yet returned for another five years in teaching. She retired again in 2013 and, from that time, she stayed retired.

Elena

Elena has worked in the same primary schools since 1987: first as the cleaning lady, next as the teaching assistant, and then a regular teacher after getting a bachelor's degree in primary education in the pedagogical science university[63] in Havana. She decided to enroll in a course to become a teaching assistant because she had always wanted to become a teacher. She continued to study and entered the pedagogical science university to develop herself as an education professional. The teacher exodus that was rampant in the school community also encouraged her to stay and prepare herself more professionally by obtaining a bachelor's degree. At the time of the interview, she had been working in the same school as the headteacher since 2015.

To the question whether her school, like many others, was experiencing a shortage of teachers, she replied negatively, yet her explanation was contradictory given the deficit of a teacher in the fourth grade. Her approach to teacher shortage mimicked the narrative officially

[63] During that time, the institution was called ISP.

framed by the Minister of Education in Cuba (see Chapter 4): as long as the classes are covered by an individual, regardless of the individual's teaching qualifications, there is no shortage problem:

> No, [my school does not encounter a shortage of teachers]. Let's see. At my school, the thing about teacher shortage is normal [and therefore, not a problem]. People explore other [career] fields ... because they have rights to be where they want to be. At my school, [the situation] is the following: there is a deficit of teachers. Not a deficit. Let's say. There is a 'necessity' of teacher in the 4th grade. But there is an alternative [way to cover for the deficit or 'necessity'] because there is a teaching assistant who covers the class ...

Elena recalled that when she was a teaching assistant in the early 1990s, she had to cover a class by herself: "I always had the training, so I was able to do it [manage the class by myself] easily." The previous informant, Angela, who started working in primary school as a teaching assistant in 2005, also experienced the same. She complained that "they [the Ministry of Education] paid me as a teaching assistant. [However,] I was not really a teaching assistant. I was teaching English [by myself]."

Concerning the teachers who left for a better paying opportunity, Elena believed that "everybody has his own interest and it needs to be respected." She admitted that the teacher salary does not cover the basic needs. However, she argued that regardless of whatever different profession they might pursue, it will never be satisfying for teachers. She perceived the phenomenon of teacher exodus to be an issue of greed rather than a response to deprivation:

> Our [teacher] salary does not cover the basic costs. However, the people who earn the most in this country are doctors and teachers. You see, no one is satisfied with his own salary. But how much [more] do you need? Health and education earn [the most]. I make 745 CUP [31 US dollars] [a month] and I cannot cover [my basic needs] because the living cost is high.... [However,] one would never be able to cover for the basic needs, not in this country nor outside.

Elena did not believe increasing the salary would either prevent teachers from leaving or bring back those who had already left. Instead, she argued that the government should help teachers address their immediate needs:

> I think it is not the salary what needs to be raised [to solve the teacher exodus]. In my opinion, you have to tackle the immediate needs of the person.... What is it that torments the person? For example, there are people who have a problem of housing, that they need materials to build [a house]. Even if the salary is increased, one [a teacher] would not be able to buy the materials, because they are expensive. Therefore, this is the problem that the government should focus on, the housing problem that teachers face.... not the salary, because salary does not solve all the problems.

Mercedes

Mercedes entered a pedagogical school when she was 12 years old and, after she graduated, she started teaching preschool in 1979. Later, while she was teaching, she enrolled in the pedagogical science university[64] in Havana to earn bachelor's degree and, later, a master's degree in Early Childhood Education. At the time of the interview, she taught preschool in the

[64] At that time, an ISP.

same primary school in Vedado where Veronica was teaching. Mercedes taught in different preschools in Havana and Mayabeque before moving to the current school in 2000.

Mercedes wanted to become a teacher after she was actively engaged in leadership activities in primary school. After completing the 6th grade, she entered the pedagogical school to become a teacher. Similar to Veronica, her main reason for remaining in teaching was because she loved working with children and she had been teaching all her life, for almost 40 years. Based on their dear friendship and long history working together in the same school for almost 20 years, Mercedes largely echoed the challenges of teaching outlined by Veronica.

First, she agreed about the low salary of teachers and referred to the mechanism that the Cuban government applied when explaining: "According to the government, we do not produce [any tangible products], thus we do not get much remuneration." Regarding salary, Mercedes did not seem to complain as much as Veronica did and was able to make ends meet by "managing things [the expenses]" and "buying things in the black market." Mercedes, however, felt sorry for Veronica who was struggling more financially because of her young son:

> There are items like medicines that sometimes her son takes, not my kid since he is a grown up. However, her kid is young, and she had to buy the medicine in the international pharmacy…. Sometimes you visit the store, pay 200 CUP, and exhaust all your money. How can something cost 200 CUP? [It is] 10 US dollars or 9.

Next, Mercedes referred to the lack of respect from students. She complained that this attitude negatively impacts the status of teachers in the society:

> Parents, when they talk to teachers, they do not care if the students are around and [just] say whatever they want to say. [Witnessing how their parents address teachers,] how can

students address teachers with respect? The same family that shows disrespect to his teacher, [does the same] in the society."

For Mercedes, however, the lack of autonomy and the lack of recognition from the government as a professional made her feel disempowered and upset her the most about teaching. These were manifested through multiple school visits and detailed lesson plans. These lesson plans, imposed by the Ministry of Education in Cuba under the name of *Perfeccionamiento*, in fact, were not only distant from the classroom practices but had little room for teachers to adapt to their own classroom setting. She complained:

> Martí said that each teacher has her own book [teaching method], but they [the Ministry of Education] don't let you [teachers] have your own book … [Y]ou need to have your own method to teach, but according to them, you don't have your own method. You do not have the scientific value. No. So, you have to do it [teaching] this way [the way imposed by the Ministry]. Really, this is what happens to you. The state sets [specific] objectives so that kids learn, but it [this policy] does not work, it is not practical. So, you apply them in different ways, but since you don't have scientific validity [according to the Ministry], you can't. You also get punished [by the Ministry] for this.

Given these challenges in teaching, Mercedes confessed that, unlike many retired teachers, after her retirement in three years she would not continue teaching.

Emiliana

Emiliana graduated from the pedagogical school in Havana in 1972 and taught in primary school until 1979. While she was teaching, she enrolled in the pedagogical science university[65]

[65] At the time, an ISP.

majoring in Biology and received a bachelor's degree in 1978. From 1979 to 1992, she worked in Lenin pre-university School teaching Biology. From 1992 to 2003, she taught Biology in middle school, where at the time of the interview Marcelo and Diana were teaching. Until she first retired in 2008, from 2003 to 2008 she worked in the dormitory where PGIs were staying, as an onsite instructor to oversee them.

At the time of her first retirement in 2008, there was an offer from the Ministry of Education looking for retired teachers to return to teaching. The incentive to attract retired teachers was a double salary: "They [the government] pay you a salary in addition to the pension. [Therefore] two paychecks." She accepted the offer, though she did not mention whether the double salary played a significant role, and she worked in a middle school teaching multiple subjects making use of the videos prepared by the Ministry of Education (see Chapter 4 on the PGI program) for two years, and for additional three years she taught Informatics in special education school for students with autism. At the time of the interview, she was retired and did not wish to go back to teaching: "People came to see me [to convince her to return to teaching] at my house, but I don't want to anymore." Even if she wanted to continue, she could not because she spends months every year in Italy where her daughter works as a doctor.

Unlike how "people say 'Since I was a girl, I have always wanted to be a teacher!'" Emiliana never aspired to be a teacher. The opportunity to enroll in the pedagogical school approached her and she took it. Reflecting on her forty years of career in teaching, ranging from primary to secondary education, from teacher education to special education, from one subject (biology), to all subjects, she said she "liked every part of it [teaching]:

> I like everything about teaching. I like the relationship between a teacher and a student, a teacher and parents, and with the fellow teachers, because you always learn, [even] from students, constantly. They [students] give you not only love and respect.... Sometimes they flatter you for what you know, so you have to prepare yourself well as a teacher so that they feel proud of you and happy that they have you as their teacher.

When I asked Emiliana about her opinion on what was occurring in the Cuban teaching force, particularly the teacher shortage and teacher exodus, her stance overall was either defensive or in denial. Emiliana simplified the root cause of the teacher shortage in Havana to be its large population:

> Everybody wants to move to the capital city. Capital cities always receive more people [than the rest of the country], and therefore require more resources, and this is what is happening in Havana. Because you hear [people] saying 'there is a necessity, a crisis of teachers!' No, it is not that there is a crisis of teachers. It is because of the population. Given that Havana is heavily populated, there is more necessity [for teachers].

Referring to the teachers who had left due to their low salary, Emiliana sounded disappointed:

> When you have decided to become a teacher, you cannot think of the salary. Like when you decide to become an engineer or a doctor, you cannot think of the salary…. Because you already know before entering the field how much they will pay you…. So, either you do it or you don't. Either you start or you don't. If you started it, finish it, and do it well.

Lastly, to the problem of teacher exodus, Emiliana assured that "in schools where there is a teacher exodus, where teachers decided to leave education, there is always a solution. It [the

government] always gives us the solution." One example Emiliana referred to was mandating teachers in middle school to teach all subjects with the support of videos, a practice that was being pursued between 2001 and 2011. In fact, the purpose of PGIs was not to address the shortage issue of teachers but to emphasize the social aspect of learning, where the idea of inclusion played an important role in the rhetoric around the Third Educational Revolution (2001-2009) (see chapter 4 on the PGI program):

> We had one time when there was a huge exodus of teachers…. [The government] came up with a good solution. It prepared teachers [PGIs] and recorded classes. These classes were provided through videos … and students received classes…. Nobody lost the opportunity of teaching and learning, never.... It was a solution. Students were never left alone without a class, even if you hear that there is a crisis of teachers.

Again, it seems that for Emiliana the solution to shortage was the simple coverage, similar to how Elena thought having a teaching assistant 'cover' the fourth-grade class represented a solution.

The overall impression from the three interviews with Eleonora, Emiliana, and Elena was that they were extremely cautious in their responses to my questions and that they were not necessarily sharing their personal opinions on the matter. For Eleonora and Emiliana, it was an individual interview; however, based on their request, each individual participated in the interview with the presence of the other. Eleonora remained noncommittal throughout the interview and often made eye contacts with Emiliana as if she was confirming her answers with her; Emiliana during her interview turned to Eleonora and sought her support or confirmation/agreement, particularly when denying the teacher shortage crisis. At the beginning

of the interview, Emiliana expressed her concern having what she says in the interview being reported to the State authorities. The same concern was expressed by Elena when she gave a heads up to the research assistant that she would not answer all the interview questions and share only limited answers.

7.7 Teachers who began their employment between 1966 and 2010 and who retired yet continue to work as a public school teacher

The last group of interviewees includes three teachers who had retired but continued to teach for various reasons identified individually.

Joaquin

Joaquin entered technical and vocational high school, the Institute of International Relations, in 1972 to become a translator. Subsequently, through part-time courses, he earned a bachelor's degree in Linguistics and Translation in the same Institute, after its level of education was elevated to a higher education institution. He spent most of his career working as an interpreter and an English tour guide, while teaching occurred to him relatively recently.

At age 55, he started teaching English in primary school in 2010 for two reasons. First, the primary school where his son went lacked English teachers, and there was a precedent in the same school that his eldest daughter also had a parent teaching English. Second, during this time, his mother was sick, so he needed to take care of her and could not travel frequently as a tour guide. At the time of the interview, Joaquin was managing three jobs:

> [During the week I am a] teacher [both in public and private sectors] and over the weekend, a translator/tour guide. I have done it for many years. When academic exchange groups visit [Cuba], I serve as an interpreter and a tour guide.

He explained that he kept both jobs, as a public school teacher and as a private English tutor, because each has its own advantage. First, his job as an interpreter and a tour guide help him to "keep my language skills alive … and improve my English…. [I]t also has the [financial] benefit that [I do] not receive from the public school." Teaching in the public sector, on the other hand, brought him "practically, the stability." Joaquin was teaching English in primary schools and advising students in the pedagogical school in the municipality of Cerro with their practicum in primary schools and another group of students in UCPEJV in the Faculty of Foreign Language Education with their theses. His advising role was an additional responsibility he assumed as he taught in the public sector. Given his exposure to a variety of student teachers, he pointed out graduating from the pedagogical science university to be the critical time point for their abandonment of the public school teaching:

> After they [students] graduate from the pedagogical [science] university [they leave teaching]. After the bachelor's degree [they leave], because graduating from pedagogical school is no good for other professions. The knowledge [from the pedagogical school] … only applies to teaching in primary school…. In the university, when students graduate …if they see the [financial] benefit of teaching in the private sector, they leave.

The same applied to Joaquin. His private English lessons were his main source of revenue. He was teaching a wide range of students, from children in his primary school, to teenagers, to adults preparing for their international trips. Some students were in pre-university taking his private lessons because "students sometimes know more than their English teachers…. Their English teacher is not trained to teach. He is an engineer, contracted to be present in the classroom." He also had some students applying for a doctorate or master's degree abroad, and

artists and painters who had international exhibitions scheduled and enrolled in his class to practice English.

He was teaching privately a total of 18 students. He registered his place as a private language institute and accepted students. Given that his major income comes from offering these private lessons and serving as a tour guide over the weekend, he considered teaching in public schools rather a voluntary work for social good: “It is more for that [purpose]. I do it [teach in public schools] with a moral commitment for children to learn. To prepare them for tomorrow and for the future.” He plans to continue teaching “[as long as] his life permits,” since he loves teaching, and remaining in both public and private sectors allows him “to balance the income.”

Natalia

Natalia holds two bachelor’s degrees: one in Russian education and the other in English education. For her bachelor’s degree in Russian education, she enrolled in the pedagogical science university[66] in Havana where it provided a 3 + 2 program which allowed students to study first three years in the Soviet Union and last two years in Havana. As part of the program, Rafaela lived in Kiev from 1977 to 1980, and when she returned, she started teaching Russian and finished her degree in the pedagogical science university. From 1980 to 1989, she taught Russian in middle school. In 1989, “when the socialist bloc collapsed, they [the Cuban government] gave the opportunity for Russian teachers to study another language…. I was interested in English and started my bachelor’s degree [in English education].”

After she graduated with a bachelor’s degree in English education, she taught English in a middle school from 1991 to 2001. From 2001 to 2013, she served as a supervisor for the

[66] At the time, an ISP.

English subject in the municipality of Marianao in Havana. From 2013 to the time of the interview in 2018, she has been teaching English in the pedagogical school where Alonso worked, and Juanita and Madiery studied. She returned to teaching after twelve years of working as a supervisor because she believed the classroom is where she belonged. Coupled with that, the headteacher at her current school was an old friend and asked her to be in charge of managing the English department:

> I graduated [from the pedagogical science university] to become a teacher, not to be somebody's boss. I like to be in the classroom with students. If they are troublemakers, I like it even more, because … I like to see them transform.

Natalia did not retire in 2018 "not only because of the necessity [of teachers] but I do not see myself at home. I do not know how to do things other than being in school. I like it." In fact, she claimed, "while I have the energy and I am healthy and needed in the place [school], that is where I will be."

Regarding her students in the pedagogical school, she confirmed and contested the comments by the previous informants. She confirmed that students nowadays come to pedagogical school with different motivations: some enter because of their interest in teaching but others enroll because "they could not make it to the other high schools." She continued, "There are many people who are learning English, not because they want to be [English] teachers forever, like me, who has been in education for many years." However, she argued that whatever their reasons for entering the pedagogical school are, the program will "ensure that students fall in love with the profession." In addition, unlike Humberto, who speculated that the rate for student teachers to enter the public teaching force to range between 40 to 60%, Natalia explained

almost all students graduate, and 95% of the graduates enter UCPEJV which requires them to teach in primary school at the same time.

Although she enjoys teaching in the pedagogical school, she identified poor teaching environment as well as the lack of support from parents to be the main challenges of teaching there. Regarding the former:

> Perhaps we need a better [learning] condition [in school.] In our case, English [education], we only have one laboratory, which is not enough. All the conditions needed [for students] to specialize in English education are not in place. The other thing is, unfortunately, we have a problem with teacher coverage which makes the remaining teachers work more. And this is burdensome.

Natalia sounded more frustrated when she elaborated on the relationship with parents who became adversary over the years. She indicated that many parents of students at the pedagogical school, in fact, discouraged their kids to become teachers: "Sometimes they tell their kids, 'This profession [teaching], no. That is not what you want to be.' [They say this] even to the students who want to be teachers." In addition, she complained that families do not value and support education, a situation that did not exist in the past:

> There is no support from the family. They believe that the teacher is responsible for all [in the education]. In the past, there was a better relationship between families and schools…. Families used to say, the teacher is the law. Nowadays the relationship with the family is difficult. It is a byproduct of their valuing other things [that is, not education].

Reflecting on the wide prevalence of private tutoring in Havana, parents do continue to

value education, but what discontinued was their support and belief in the quality of 'public' education. In the classroom, Natalia struggled everyday with students because they paid less attention to learning in school and constantly sought out private tutoring:

> I even proved to the parents, who pay for English tutors, that students are not learning despite the tutoring…. They are parents who have a lot of money and waste [money] like that. This is a topic that I always struggle with my students. [They ask,] 'Teacher, how can I look for a private tutor?' [I respond,] 'But why? Make most of your time while you are in school!'

Despite the unfavorable environment, she was confident that her students would not drop out from the pedagogical school. She said, "I kept them inside my pocket." Speaking in Cuban Spanish, she meant that she convinced her students stay in teaching and she was not letting them leave. The same level of confidence was found with regard to the new program in the pedagogical school which expanded to training of middle school teachers. She acknowledged the challenges ahead, yet argued the program would work with a rigorous preparation of student teachers:

> I would say it is playing with fire. Because a teenager will be struggling with another teenager! The task won't be easy. It [the success of the program] depends a lot on the preparation … the skill sets the program provides them to work with [students in] secondary education…. From the second year, students participate in a weeklong practicum every month. Mentors in each middle school will also give them a follow-up of their class.

For those teachers who are early in their career and thinking about leaving, she wanted to share her story and gave the following advice:

> I cannot convince them to stay but I would like to analyze with them [young teachers] the reality. Or at least, give them the advice that while you are working as a teacher, teach with dignity. After that, you can do whatever you want to do with your life. While you are here [in the classroom], however, [teach] with dignity…. For me, I never thought of becoming a teacher. I always wanted to become an engineer. I entered the technological university in Havana, yet regarding the call [from the government] in need to train more teachers, I responded [and became a teacher]. Then I fell in love [with teaching.]
>
> Carolina

Carolina graduated from the pedagogical school in 1965 in Havana, and in January 1966, she was assigned to a primary school deep inside the mountains in Mayari Arriba, Santiago de Cuba, as part of her social service. After a year, she had to return to Havana because she suffered from a skin infection. At the time of the interview, she taught civic education and history to 5th graders. She had been teaching in primary school for 53 years. She first retired in 2010, yet continued to teach in the same primary school where Veronica and Mercedes were teaching.

Her main motivation to enter teaching was her experience participating in the literacy campaign at the age of 15. She spent a full year in the mountains teaching farmers how to read and write. She lighted up when she recalled her experience in the literacy campaign:

> I fell in love with this career of teaching after participating in the [Literacy] Campaign .... I had one student who was ninety something years old and he told me, “Teacher, I want you to teach me nothing but how to sign, so that I won’t have to sign with an X.” Because

> that was what they did, the capitalists, before the triumph of the Revolution. .... They exploited them because they signed whatever [documents] because they didn't know how to read.
>
> To the question why she remained in teaching even after her retirement, she replied:
>
> Because of the necessity [of teachers]. Because of the teacher exodus, so I did not feel [good] sitting in my house, when there is a necessity of teachers in school. I did not feel comfortable. That's why I never retired.

The general impression from Carolina was that she tended to highlight the positive aspects of the teaching profession, aspects that had encouraged her to enter and remain in the profession. For example, while she noted her reason for continuing after retirement was because of the problem of teacher shortage and teacher exodus, she chose to negate the presence of these developments: "For me, I don't think it [teacher exodus] is true. There is no problem in my opinion. We are [even] lending [teaching] services to other countries." With regard to teacher shortage, she applied the narrative that as long as the coverage is met, the shortage problem is addressed. She also argued the reopening of pedagogical schools to be a promising solution:

> The coverage [of teachers] is met because the headteacher, [deputy headteacher, and] all the teaching staff with the capacity ensure students will not miss class. That is the fundamental aspect…. When students complete their ninth grade, they enter pedagogical schools. I think it [the number of teachers] will increase. In addition, we, the retired teachers, are providing a great support [to the teaching force].

In addition, Carolina was the only informant who bluntly criticized teachers leaving the classroom due to economic reasons:

> It occurs because people do not have consciousness…. During the Special Period, there was a problem, but it did not affect people to leave [teaching]…. I believe that people feel love for their profession. I do feel love for my profession; [thus,] I cannot leave the classroom because of a financial problem. Some people leave [teaching for the economic reasons] but I didn't. I cannot [leave] for economic reasons.

She believed instead of abandoning the profession, teachers should "plan and organize their spending." She compared the current time being better than the years under the capitalist regime: "Before [the Cuban Revolution] things were cheaper in the capitalism but not everybody could eat…but now we have food guaranteed." To the question of how long she would continue to teach, she shared, "Well if it is possible, [as long as] my life permits. It [teaching] does not have the age [limit]. There is no limit."

Chapter 8: Cross-Case Analysis, Implications, and Conclusion

8.1 Introduction

This dissertation study sought to address the following research question: Before, during, and after the Special Period, why did individuals enter, remain in, or leave teaching as a profession? To address this question, I conducted a qualitative study, relying primarily on semi-structured interviews with 22 teachers, who were in various stages of their careers, in Havana, Cuba. The study was informed by Bronfenbrenner's ecological systems theory and human capital theory and contextualized by a review of policy documents and other literature.

In this chapter I present a discussion of the findings, first focusing on the factors that influenced teachers' occupational decision making, at the individual, micro-, exo-, and macro-levels. Second, I discuss the findings comparing across groups of interviewees, defined by time period when they entered the field. Following the discussion of the findings, I identify the implications of this study for theory and research on teacher occupational decision making, for research methodology, and for policy/practice. This chapter ends with a conclusion section which discusses possible future research topics.

8.2 Cross-Case Analysis

Factors that influence teachers' occupational decision making in Cuba

Individual level

Factors such as *interest in the teaching subject, interest in teaching and teaching as a profession, interest in obtaining a bachelor's degree, and age* shaped the occupational decision making of teachers in Cuba. For some, these factors served as reasons to enter and stay, and for others, they informed teachers' decisions to leave the profession.

Altogether, six out of 22 informants shared that they entered teaching due to their interest in a subject, which was primarily English. This derived from the sampling strategy which strictly relied on the network of the research assistant who was a recent graduate of the Foreign Language (English) Education program at UCPEJV and a middle school English teacher in Havana (see Chapter 6. Methodology). Out of the aforementioned six informants, three (Juanita, Madiery, and Laura) were student teachers who enrolled in the preservice program at the pedagogical school and UCPEJV to become English teachers. They combined other reasons, such as not being confident in mathematics and enjoying working with kids, as having influenced their decision to pursue a career in teaching.

Diana was another informant who identified her interest in the language to be a critical factor that led her to teaching, yet her initial aspiration was to become an interpreter. Nevertheless, there was a demand for more teachers in the country, and she responded by becoming a teacher. Alonso and Sammara entered UCPEJV because they saw the generic utility of English in and outside of Cuba. Their interest was not necessarily in the language itself, but they were more intrigued by the uses of English in Cuba, related to the employment in the private sector, and outside of Cuba, taking into consideration the possibility of moving abroad where their close family members live.

Interest in teaching and teaching as a profession was also widely referred to as one of the reasons that led individuals to enter a preservice teacher education program and to pursue employment as a teacher. First, there were a few teachers who recalled that they had "always wanted to be a teacher" (Laura, Luana, Veronica, and Mercedes). Humberto also noted teaching had always been his first career choice, driven by its high prestige in the society. A somewhat

related factor, having a love for working with children or youth, attracted five interviewees to enter a preservice teacher education program and pursue employment as a teacher (Juanita, Madiery, Pablo, Veronica, and Carolina). This factor influenced four interviewees to remain working in the public education system, despite various challenges they faced (Veronica, Diana, Mercedes, and Carolina).

Alonso and Sammara, who entered UCPEJV with an extrinsic motivation to make use of the English skills, came to like teaching after their teaching experience in the public and private sector. Their newly found interest in teaching manifested differently for Alonso and Sammara. After the completion of the preservice program, Alonso undertook his social service teaching in a pedagogical school and wished to study abroad through the exchange programs in the University of Havana. For Sammara, liking teaching (and working with children/youth) was not enough to keep her working in the public education system; after completing the preservice program she did not do her social service and worked in the private sector as an English tutor.

Marcelo, Matias, and Angela decided to enter the preservice program with intention to *obtain a bachelor's degree*. Angela, to a greater extent than Marcelo, was driven by this extrinsic motivation (for having the status of being a university graduate) and, therefore, at the completion of her part-time courses at UCPEJV she did not seek employment in a public school but pursued work as a teacher/tutor of English in the private sector. Matias, who entered UCPEJV because it was the only available university based on his performance in the university entrance exam, did not undertake social service and immediately sought positions in the private sector. Unlike Angela, Matias was less fond of teaching and therefore worked in jobs that were different from teaching (i.e., building furniture and selling it on Revolico). In contrast, Marcelo remained in the

public education system even after the completion of his degree, mainly motivated by the professional support from fellow teachers.

Age also operated as a critical factor for some Cuban teachers to decide whether to stay in public schools. Veronica, who was in her mid-40s, felt it was imperative to leave public school teaching, in which she had been involved for more than thirty years, before it became too late for her to get a job in the private sector. According to Diana, there was a rule of thumb in the private sector that the age of 35 was considered as a threshold where individuals were recruited and could be employed. Diana, who was 52 years old at the time of the interview, regretted not having been proactive in her younger days searching for jobs outside of public sector schooling. For her, age was one of multiple factors that deterred her from leaving.

Microsystem

Microsystem refers to the immediate surroundings of individuals that influence their daily interactions. Factors such as *family, classmates in the preservice program, poor learning environment in the preservice program, fellow teachers at the schools where they did their practice teaching or where they became employed as a teacher, and poor teaching environment in public schools* fall under this category when applied to the occupational decision making of teachers in Cuba.

Family was a frequent factor noted by multiple informants. Explicit and implicit family influences both encouraged and discouraged individuals to enter preservice teacher education, pursue employment as a public school teacher, and/or remain in the teaching career. For instance, Humberto reported that many of his family members were teachers and he was proud to become one as well. For Laura, it was on the contrary: even if she had always wanted to be a

teacher, her mother, who was an English teacher in middle school in Havana, did not support her and continuously advised her to seek other professions after graduating with a bachelor's degree in Foreign Language Education. Matias, who did not really want to attend UCPEJV, remained till the end of the program because his family members pushed him to obtain a university degree.

Having close family members live abroad also seemed to influence the occupational decision making of individuals in Cuba. For example, Laura, Sammara, and Alonso had siblings living in the U.S., Europe, and Peru, and even though they had little possibility of moving abroad and getting a job in other countries, their family members' situations/experiences greatly influenced their decision to major in Foreign Language Education and take advantage of English skills they developed as part of the preservice training. I also speculate that Eleonora's and Emiliana's decisions to not to return to teaching may have been associated with their family members residing abroad. Eleonora could afford to not work and stay home by living off of her husband's salary in the private sector and complementing it with remittances from her brother and daughter living in the U.S. Emiliana was traveling to Italy regularly to visit her daughter who worked as a doctor, which gave her little financial incentive to continue teaching after retirement.

Preservice program classmates – who enrolled based on the extrinsic motivation factors, such as the only accepted institution, parents' push, or obtaining a degree – negatively influenced or deterred individuals from opting for a career in public school teaching. Juanita and Madiery, who entered the pedagogical school with intrinsic motivation to become teachers (i.e., they liked teaching and/or liked working with children), expressed their frustration studying with the classmates, who were not intrinsically motivated but rather enrolled in the program for extrinsic reasons. Although they did not explicitly identify their classmates as a critical factor for any

negative occupational decision making, it seems that the quality of their learning was reduced by the classroom disturbances by their peers. Furthermore, the average low performance of students in the pedagogical school could potentially damage the reputation of the profession and, in turn, diminish the social status of teachers, which in the long term may negatively impact individuals' decisions to continue teaching.

Equally in UCPEJV, Sammara and Laura mentioned that many of their classmates were not interested in becoming teachers; this situation appeared to influence their decisions, once they received their bachelor's degrees from the Foreign Language Education program, to opt out of the social service "requirement" and instead to pursue work in tourism in the private sector. Angela enrolled in a part-time program at UCPEJV (while teaching full time) with a strong motivation to obtain a bachelor's degree. She recalled that many of her peers in the program were military personnel and their main goal was to get a bachelor's degree for a fast promotion and salary raise. This setting at UCPEJV may have confirmed and reinforced Angela's initial idea to leave public education immediately after the completion of her degree.

In addition to the uninterested classmates, the *poor learning environment in the preservice program* consisted of limited instructional materials (viz., textbooks) and inadequate facilities (e.g., computer labs) as well as the shortage of teaching staff. Their perception of this environment may have largely dismantled the initial motivation and expectations of student teachers. No informants noted explicitly that the detrimental learning situations in the pedagogical school and UCPEJV drove them away from entering employment as a public school teacher. However, some interviewees complained about the poor learning environment, and I believe that they would perceive the lack of resources as the declined investment in education by

the government and a possible rearrangement in the national priority and have this impression confirmed through witnessing teacher shortage in the preservice program. The high instructor turnover rate in the pedagogical school, in particular, not only provides negative examples for student teachers but also indicates that teaching in public education system is not a promising career in contemporary Cuba.

The lack of teaching quality among the teachers who remained was another factor that contributed to Sammara's decision to avoid entering employment in a public school. She recalled her experience in practicum where the English proficiency of *fellow teachers* in the pre-university was extremely poor. Simply, she did not want to become part of them. For Angela, it was lack of support from *fellow teachers* (as well as the headteacher) while working full time in middle school that was critical in her decision to abandon teaching in public school.

Great support from fellow teachers, on the other hand, served as a positive factor in teachers' decisions to remain in the profession. For instance, Marcelo decided to remain as a teacher at a public school, which had little staff turnover, because of the headteacher's style and actions, providing rigorous professional training and extensive supervisory support. For Marcelo, it was the first school that he had ever taught, and it did not seem he would quit, despite the general challenges that remained constant across all schools in Havana, such as the low teacher salary and lack of resources.

Challenging teaching environment in public schools was a factor that was unanimously noted across various groups of informants. Again, this factor for some individuals encouraged them to leave the profession, for others it inclined them to consider leaving, and for the others it informed their decision to continue teaching, to remain resilient in the difficult times and

demonstrate solidarity. Across a series of interviews, there were two main settings where informants found the teaching environment in public school extremely challenging: a) student teachers encountered it during their practicum experiences and b) teachers working in pre-university, pedagogical school, middle school, or elementary school, depending on the years of experience, perceived that either the teaching environment stayed poor or had worsened over the years.

Sammara when she referred to a quarter of her classmates who graduated with her and dropped out without completing their social service "requirement" noted that student teachers usually decide not to enter employment after their experience of practicum in public schools. Sammara was one of them as she was dissatisfied with the experience working at the pre-university, where she felt that the teaching environment was set for failure: the classroom was overcrowded with students, the instructional time was extremely short (45 minutes), and teaching materials were either insufficient or outdated. The main frustration for Matias was that grade inflation was rampant in the school community. He found during his practicum assignment that teachers were requested by the school leadership to falsely report on student achievement and cover up any low performances. Disappointed at this practice, along with other dissatisfying factors, he decided to drop out after the graduation.

Laura during her practicum experienced a wide gap of English skills among students due to the prevalence of private tutoring for some but not all students; this made it difficult for teachers to organize lessons for the class. Luana shared that the remaining teachers had been teaching extra hours to cover for the shortage and were largely overburdened. As student teachers, both Laura and Luana wanted to reserve their decisions of whether to enter

employment until the end of the degree, and for the time being, focus on the completion, though their experiences during the practicum certainly did not encourage them.

Similar challenges were identified by teachers currently employed in schools and influencing their decisions whether to continue in the public education system. Unique to the pedagogical school, Alonso and Natalia echoed what was raised by Juanita and Madiery, managing a mixture of motivations, which in many cases were extrinsic (e.g., this was the only program they were accepted in, due to their low academic performance, and their parent's push to complete a high school degree). Furthermore, while Natalia wished to continue teaching in the pedagogical school, Alonso wished to move to the university, where he had better experience teaching students who were more mature and motivated to learn. Sammara, in addition to the unfavorable practicum experience in the pre-university, decided not to participate in her "required" social service because she was assigned to a pedagogical school, whose location she perceived to be in a bad neighborhood and whose students were difficult to teach.

Jesus, who recently came back to teaching mathematics in pre-university at the time of the interview, reiterated the challenges that Sammara experienced during her practicum in the pre-university, including: overcrowded classroom, short instruction time, students not interested in learning, and a large gap in mathematics performance. He also regretted that not much had improved over the six years while he was away from the public school: the grade inflation as well as lots of paperwork remained as part of the school culture. One month back into teaching in the public school, he had already decided to return to the private sector and engage in a gig economy.

Angela, in addition to the lack of support from fellow teachers, complained that the

unjust salary, bad student behavior, as well as the lack of instructional materials make teachers suffer in the public education system. Lack of instructional materials to teach English was in fact a common challenge perceived at all levels of education in Cuba (Joaquin, Angela, Sammara, Luana, Matias, and Natalia). After graduating from UCPEJV, Angela was able to secure a job teaching with a network of English tutors, at a private home of one of the tutors converted into classrooms. There, she was exposed to a better teaching environment, with a higher salary, more motivated students, more instructional materials, and, most importantly, more supportive and friendlier group of co-instructors, which gave her a sense of belonging and a high level of satisfaction, encouraging her to continue working.

As much as Veronica saw the relationship with students as a single incentive that motivated her to remain in the public education system, the lack of respect from students occurred to her as a major challenge in teaching. She, along with Mercedes, argued that their students' behaviors stemmed from the lack of discipline and the limited valuing of education in their households. Unlike the past, when school was considered an extension of the household and the education was a co-responsibility of the two, at least some parents nowadays reject this notion and pay less attention to disciplining their children. In addition, some interviewees reported that now some parents expected favoritism for their child in return for providing material support to augment resources in the classroom. Mercedes pointed to the reduced autonomy in how they teach in the classroom, manifested through the *Perfeccionamiento* reform, which requires teachers to follow a detailed guideline prescribed by the government and receive frequent monitoring visits, as a factor that undermined her commitment to remain in the profession. Because of this and other factors, Mercedes planned to stay three more years until

she was eligible to retire and then leave the profession for good.

Exosystem

Exosystem refers to the formal and informal structures in the society that do not directly affect individuals, like those in the microsystem, but encompass and impinge upon their immediate setting and thereby influence, delimit, and at times determine individual's behavior and attitude. From the perspective of an individual, government policies, distribution of goods and services, and informal social networks fall under this category. Applied to Cuban teachers, *low teacher salary* and *alternative jobs available for public school teachers* were factors in the exosystem that influenced their occupational decision making.

Low teacher salary has been the single critical factor that caused the teacher exodus after the collapse of the Soviet Union in 1991 and has been at the center of the discussion determining the occupational decision making of teachers in contemporary Cuba for the past 30 years. Echoing the views expressed by teachers in many countries around the world (e.g., see Stromquist, 2018), almost all informants agreed that the salary for teachers in the public schools was low. However, how the salary was perceived manifested differently across the informants based on their entry year to preservice program or employment in teaching in public schools.

For the group of informants who entered the preservice training program in 2010s, the teacher salary was not simply low; they utilized the term unjust, indecent, inhumane, and negligible to describe the salary for public school teachers in Cuba. For example, Sammara believed that the teacher salary was merely "symbolic," and Matias described the salary, which ranged between 20 to 30 US dollars per month, as "absurd". Identifying the teacher salary in US dollars or Cuban convertible peso, rather than the national peso, was unique to this group and

served as an extrinsic motivation factor encouraging them to leave for the private sector and to consider departing the country.

The informants, who began their employment in the public school in the 2000s, took a similar stance regarding teachers' low salary. They responded by leaving for the private sector (Angela, Jesus and Pablo), switching jobs frequently (Jesus and Pablo) or seeking ways to combine the employment in the public and private sector (Jesus) for a higher income. Humberto and Marcelo are the only two among interviewees who started their employment in the public education system in 2000s and 2010s and who remained amidst the teacher exodus. They are from the Eastern provinces, which may indicate that their perspective is informed by the regional culture that is more loyal to the Revolution and society compared to that of Havana. They agreed that the salary of teachers was low but were able complement it and maintain a high level of occupational satisfaction through other channels, such as the high prestige of school, great fellow teachers (Marcelo) as well as the opportunity to balance between work and the graduate studies (Humberto).

Teachers who began teaching in the public school during the Special Period demonstrated a mixture of ideas toward the teacher's salary. They resonated with the opinions of the younger generation that "the teacher salary is not enough" (Rodolfo) and "teachers are not well remunerated" (Veronica), but tended to reiterate the Revolutionary government's national priority on education and health, despite the fact that this priority no longer being reflected financially (see Chapter 4 for a stagnant teacher salary in Cuba, which became lower than the national average in 2014). In practice, this group also entailed a wide range of teachers, those who tolerated/accepted the turmoil of teacher exodus and planned to stay (Diana) or planned to

leave (Veronica), those who depended on their husband's salary from the private sector (Eleonora and Diana), and those who considered leaving but did not do so because of a strong attachment to the country and its public education system (Rodolfo).

The general notion of the two groups who entered public school teaching before the Special Period in the late 1980s and either continued or retired from teaching was the following: they acknowledged the fact that the living cost in Havana is high and the teacher salary does not cover the basic needs. However, they argued that it is an individual's responsibility to plan ahead regarding their expenditures and the low salary is not a justifiable reason for teachers' departure. Therefore, they responded rather strongly and negatively to the teachers who had left for a higher salary; they characterized such behavior as a representation of "greed" (Elena), lack of "commitment" (Emiliana), and lack of "consciousness" (Carolina). This was in stark contrast with the previous four groups, who entered preservice training and employment in public schools during or after the Special Period and who considered teachers' departure to the private sector an individual right to pursue one's preferred career and lifestyle.

It was not only the low teacher salary but the expansion of *alternative jobs that are available for public school teachers* that played a fundamental role resulting in the explosion of teachers' departure from public schools in contemporary Cuba. According to the informants who attended or graduated from UCPEJV (Laura, Luana, Alonso, Sammara, and Jesus), teachers with a bachelor's degree in Foreign Language Education commonly left for jobs in tourism such as the tour guide and translator, and those with a degree in mathematics, technology, or informatics worked as a programmer, web designer, or accountant in the private sector. The teacher exodus seems to have been an unstoppable, irreversible force involving many – but by no means all

teachers – ever since its inception during the Special Period. Three major factors associated with the alternative jobs for teachers, which may have contributed to the continuing pressure for departure, include the following:

What is known as Cuba's eBay or Craigslist, an online website, Revolico, has facilitated fast and effective communication of supply and demand of goods and services in the private sector. Launched in 2007 by the Cuban immigrants in Spain, Revolico hosts a wide array of products, including houses, old cars, imported goods, and at times illegal products such as visas and stolen phones. The website also provides the service of labor market intermediaries, a platform where individuals can easily post and find jobs as a cleaning lady, maid in a hotel and/or private house (e.g., Veronica's colleagues at the elementary school), server in a restaurant (Pablo), or immediately engage in the gig economy selling phones, baby strollers, etc. Of course, none of these types of work requires a degree or utilize the skills associated with it but, according to Jesus, generated a good income.

The legalization of private tutoring (*Repasadores*) in 2010 played an important role allowing many underground tutors to surface and attracting non-language subject teachers to leave for teaching in the private sector. Jesus is an example: he temporarily came back to teaching to brush up his mathematical knowledge/skills and search for clients in the classroom. He intended to explore the possibility of combining teaching at the pre-university in the morning and tutoring in the afternoon, which was illegal for him and only legal for the language teachers.

Two English teachers were teaching private lessons after school at the time of the interview. Alonso saw the benefit of teaching in the public school with a specific plan to move and teach at the University of Havana, build a network, and later receive the scholarship from the

University to study abroad. To complement the low salary, he taught private lessons in the evening. Joaquin chose to teach in both sectors because teaching in the public school gave him the stability and he felt the social responsibility to contribute to the development of the future generation. However, for Joaquin, most of his income came from tutoring students.

It is unclear how effective this measure has been in meeting its objective to retain teachers: unless the individual teachers found a clear motivation and respective incentive to maintain in the public education system, teachers tended to drop out. This was the case for Sammara and Angela, who decided to focus on private tutoring for the reasons of low salary[67], poor quality of fellow teachers, and poor teaching environment in public schools.

Furthermore, teacher salary, which has plateaued at US 20 dollars for the past two decades, also played into teachers' departure for jobs in the public sector other than teaching. The salary of government positions that used to be lower than the teacher's salary, now exceeded and began to extract teachers from the classroom. According to ONE (2017b), the year 2014 marked as the first year when the average teacher salary was lower than the national average, and in 2017, it was one of the lowest paying jobs in Cuba (ONE, 2018b) (see Chapter 4 on the average teacher salary in the 2010s). Given the situation, teachers chose to move anywhere, across or within sectors that paid them a better salary. According to Laura, the graduates of the Foreign Language Education program at UCPEJV also acquired jobs in the public sector at the Ministry of Foreign Affairs, airports, and customs, where they may get paid more than public school teachers, though less than jobs in the private sector. In addition, these other public sector jobs – as with public school teaching – allowed them to enjoy the stable salary as well as

[67] By tutoring a group of three to four students two hours per week, teachers can easily make their monthly salary in the public school.

accumulate their years toward retirement.

Macrosystem

Macrosystem implies the general *prototypes* that exist in the culture or subculture and set the pattern for the structures and activities occurring at the ground level. *A transitional state of Cuba* which embodies a mixed culture of socialist and non-socialist norms and ideologies created a unique macrosystem for the current teaching personnel in Cuba. Transitional Cuba hosted a wide range of individuals with *distinct values* and *incongruent perspectives toward the government and its policies in the public education system* which affected their decision to enter, remain in, or depart from the teaching profession.

Overall, the culture of the transitional Cuba led by the forces associated with the capitalistic values was not supportive of the profiles expected of Cuban teachers. In other words, there was a mismatch between what the youth aspired to and what is demanded of teachers, which resulted in a constant challenge in attracting and retaining teachers in their early career. Being a teacher in Cuba was considered "tough," "struggling with students," "requiring much patience," and "working more than you make" (as various interviewees expressed it), while Cuban youth valued efficiency and practiced a real time calculation of rate of return in each occupation. Given this backdrop, all informants agreed that the teacher shortage would likely continue due to the problems of both recruitment and retention.

A great example is Pablo and Jesus who were heavily oriented by monetary values in the society. Both switched jobs frequently and were always alert about the upcoming employments that paid a better salary. Jesus with a background in math and informatics education was extremely nimble at calculating the rate of return, the time and energy spent against the salary

paid, simultaneously compared it across multiple jobs, and opted for the highest. Pablo loathed the private sector, comparing the experience to the 21st century "slavery;" however, he believed it is the only place that allowed for a "living with dignity". Jesus's and Pablo's values, focused on financial incentives, gave them a fundamental reason to leave teaching, even though both identified it as their favorite profession they held so far.

For others, loyalty toward the public education system (Rodolfo), commitment to one's profession (Emiliana), and the necessity of teachers in the society (Carolina) were the traditional values that stood out and kept teachers in the public education system. Joaquin's initial motivation to enter teaching, which was to contribute to the teacher coverage, and his intention to continue as part of "moral commitment" and "social good" are in line with the values promoted by his cohort.

When these values (commitment, loyalty, and social need) are translated into actions, they often mirrored "resilience" and "adaptability" in difficult times. Rodolfo identified the two attributes as the essence of Cuban identity and assimilated each Cuban as an "economist." Given the economic hardship that has gone on for decades, Cubans developed a skill to maximize the use of resources by meticulously planning and organizing their spending. Rodolfo, Mercedes, Emiliana, Natalia, and Carolina argued that this is the way to tackle financial constraints, and it is possible for teachers to live on what they make and stay in teaching. Indeed, this was what they did.

Among the five informants who suggested well-planned spending as a solution to tackling the financial constraints, Mercedes was the only teacher[68] who foresaw her departure

[68] Although Emiliana had retired for good at the time of the interview in 2018, she had continued teaching five additional years after her first retirement in 2008.

after retirement. Though not explicitly noted as a main reason, she did not *resonate with some of the policies imposed by the government*, for instance, defining the salary in the public sector based on productivity, which is unfavorable for teaching because it is less visible and difficult to identify. In addition, she felt disempowered by the detailed lesson plans prescribed by the government which left little room for adaptation to the classroom environment and by the frequent school visits, both of which she perceived as reducing autonomy and respect as professionals.

Rodolfo and Natalia also disagreed with some of the policies implemented by the Ministry of Education; however, their strong belief and commitment to the government and the society motivated them to stay and continue in the public education system. Rodolfo, for example, condemned the salary policy that encouraged teachers to work extra hours at the cost of their quality of teaching, and Natalia was doubtful when the pedagogical schools expanded their preservice programs to train middle school teachers, calling this arrangement "playing with fire." Nevertheless, these concerns were not sufficient to push them to leave public school teaching. Instead, Rodolfo and Natalia engaged in efforts to make the unsatisfactory policies work rather than to abandon the teaching force.

Emiliana and Carolina, on the other hand, agreed entirely with government practices and continued to teach even after their retirement. Emiliana, for example, was a firm supporter of the government: she believed whatever the problem the society encounters, government leaders will grant the best solution to the public. Regarding the phenomena of teacher exodus and teacher shortage, though they were officially acknowledged as national problems, she was extremely defensive and, at times, in denial, simplifying and minimizing their cause to be an explosion of

population in Havana. In fact, her defensiveness in discussing government policies made it difficult to discern whether this derived from her concern of retaliation by the government or her truthful belief in them.

Carolina stated that she did not believe there was a real teacher shortage in Cuba: she referred to the group of teachers on the international mission ("*Yo Sí Puedo*"), which she believed impossible if there is a severe internal shortage. When discussing teachers' financial struggle due to high living cost and low salary, Carolina uniquely drew upon the pre-Revolution period as a reference point for comparison. She reflected on the core aspect of socialism, equity, and viewed the situation in contemporary Cuba as still better than the days under the Batista regime, because everybody could eat and learn, owing it to the Revolutionary government. She committed to teaching as long as she was healthy enough to do so.

At the opposite end of the spectrum were Pablo and Matias, who expressed their resentment and frustration over the leadership in Cuba. They indicated that government leaders no longer represented the public, and that the society was suffering from "structural problems" across all sectors, which teacher shortage being only one of many. For example, grade inflation in schools, according to Matias, is a situation about which the government stays oblivious and unresponsive. Pablo also believed that the government does not consider citizens' wellbeing as the ultimate goal of the society, which gave him not only the reason to leave the public sector, but also, with no hope in the private sector, to emigrate from the country. Their perception of incompetence of the government encouraged Pablo and Matias to seek ways to survive without expecting any support from the government.

Factors that influenced different groups of teachers[69]

In this section of Chapter 8, I discuss how the above-discussed factors influencing their decisions to enter, remain in, and exit public school teaching by teachers who entered the field during different historical periods (before the Special Period, during the Special Period, in the 2000s, and in the 2010s) differed across groups. The discussion is organized by the different levels at which factors are seen to operate.

Individual level

At the individual level, there were four main factors that influenced informants' occupational decisions to enter, remain in, or leave the public school teaching*: 1) interest in the teaching subject (English); 2) interest in teaching and teaching as a profession; 3) interest in obtaining a bachelor's degree; and 4) age.* Figure 2. illustrates how different groups of informants relied heavily on a particular factor or a particular set of factors, when engaging in their occupational decision-making process.

- [69]Student teachers who were enrolled in a preservice program in a pedagogical school or a pedagogical science university (Juanita, Madiery, Laura, and Luana).
- Graduates of pedagogical science university who did or did not enter employment as a public school teacher in the 2010s (Sammara, Alonso, Matias, Humberto).
- Teachers and former teachers who began their employment in the 2000s (Marcelo, Jesus, Angela, Pablo).
- Teachers and former teachers who began their employment during the "Special Period" (From 1989 to 1990s) (Rodolfo, Eleonora, Veronica, Diana).
- Teachers who began their employment between 1972 and 1987 before the "Special Period" and either had or had not retired (Elena, Mercedes, Emiliana).
- Teachers who began their employment between 1966 and 2010 and who retired yet continue to work as a public school teacher (Natalia, Joaquin, Carolina).

Individual Level				Microsystem					Exosystem		Macrosystem	
Interest in the teaching subject	Interest in teaching	Interest in the Bachelor's degree	Age	Family influence	Classmates at the preservice program	Poor learning environment in the preservice program	Fellow teachers	Poor teaching environment in public schools	Teacher salary	Alternative jobs for public school teachers	Distinct values in the transitional state of Cuba	Perspectives toward the government
Juanita	Juanita	Matias	Veronica	Laura	Juanita	Juanita	Sammara	Laura	Laura	Laura	Jesus	Matias
Madiery	Madiery	Marcelo	Diana	Sammara	Madiery	Madiery	Angela	Cynthia	Sammara	Cynthia	Pablo	Pablo
Laura	Laura	Angela		Alonso	Laura	Laura	Marcelo	Sammara	Matias	Sammara	Rodolfo	Rodolfo
Sammara	Cynthia			Humberto	Cynthia	Cynthia		Alonso	Pablo	Alonso	Emiliana	Mercedes
Alonso	Sammara			Matias	Sammara	Alonso		Matias	Angela	Jesus	Natalia	Emiliana
Diana	Alonso			Eleonora	Angela	Sammara		Jesus	Jesus	Pablo		Natalia
	Humberto			Emiliana				Angela	Veronica	Angela		Carolina
	Pablo							Rodolfo	Rodolfo	Veronica		
	Veronica							Veronica	Diana	Joaquin		
	Diana							Mercedes	Mercedes			
	Mercedes							Natalia	Elena			
	Carolina							Joaquin	Carolina			

Figure 2. Factors that influenced different groups of teachers by level

The first factor, *interest in the teaching subject*, was largely dominated by the group of student teachers and the group of graduates of UCPEJV who did or did not enter public school teaching in the 2010s. The student teachers, for example, enrolled in the preservice program because of their interest in the language. The two graduates of UCPEJV in the 2010s entered the field mainly driven by the generic utility of English in and outside of Cuba. Diana, who entered the field in 1989, was the only teacher who began her employment before the 2000s and identified language to be the main motivation for her to pursue a career in teaching. Unlike the informants who were student teachers at the time of the interview and those who began their work as teachers in the 2010s, Diana opted for work as a teacher, despite her original aspiration in becoming an interpreter, in order to respond to the necessity of teachers in the country.

The second factor, *interest in teaching and teaching as a profession*, was evidenced across all groups of informants with a relatively balanced representation of each. The student teachers, a former teacher who began his employment in the 2000s, as well as the teachers who entered public school teaching before the Special Period, recalled that they enjoyed working with

students, and this played a critical role for their pursuit of a career in teaching. Similarly, there were multiple informants across groups who noted they had always wanted to be a teacher.

The third and fourth factors seemed to resonate with particular groups of informants. The graduates of UCPEJV in the 2010s as well as the teacher, who began his employment in the 2000s, chose public school teaching career because it involved obtaining a bachelor's degree. Age was a determinant factor for the group of teachers who entered teaching during the Special Period. The age of the teachers in this group ranged from the mid-40s (a teacher, who was about to lose the opportunity in the private sector based on the tacit age limit) to the 50s (a teacher who had already passed the age and decided to remain in teaching).

Microsystem

Contemporary Cubans tended to depend heavily on the aspects of their immediate surroundings when making occupational decisions. Compared to the other levels, factors in the microsystem were most frequently noted when informants were asked about their decision to enter, remain in, or leave the teaching profession. They largely based their decision on *1) the opinions of the family members, 2) their perceptions of their classmates and 3) the poor learning environment at the preservice program, 4) their perceptions of their fellow teachers, and 5) the poor teaching environment in public schools*. Except for the last factor, factors in the microsystem were predominantly referred to by the groups of informants who entered the preservice training and employment in public schools after the 2000s (see Figure 2.).

The comments by the informants indicated that they frequently depended on their family members' opinions when making their occupational decisions to enter, remain in, or leave the public school teaching. The two groups of informants – a student teacher and the recent

graduates of UCPEJV – were either encouraged or discouraged to enroll in this institution by their family members. Having family members reside abroad seemed to affect informants' decision to major foreign language (English) education, and at times, relieved them financially through remittances, which gave them an extra motivation, along with other factors, to leave or to not enter employment in public schools. The latter trend, in particular, was evidenced across multiple groups, ranging from the recent graduate of UCPEJV, a former teacher who entered teaching during the Special Period, to a retired teacher who entered teaching in the 1970s.

Limited motivation by the classmates as well as the poor learning environment in the preservice program was largely felt across all student teachers who attended the pedagogical school and UCPEJV. The difficult instructional environment at the pedagogical school was infamous among recent graduates of UCPEJV and, therefore, encouraged some of them to dismiss their "required" social service at the pedagogical school and to seek positions in the private sector. The perceived quality and the relationship with the fellow teachers at public schools also played a critical role for the recent graduate of UCPEJV and a teacher and a former teacher who entered employment in the public schools in the 2000s. Depending on the level of support they received from the fellow teachers and the sense of belonging they felt at their workplace, informants opted to continue or discontinue public school teaching.

Informants from all groups unanimously called for the improvements of teaching environment in public schools. Student teachers encountered classroom challenges during their practicum; however, they enjoyed working with students and decided to hold off their occupational decision making until at least the end of the training program. The recent graduates of UCPEJV, because of their perceptions of the deficits in the teaching environment, either

ignored the social service “requirement” and left for the private sector or entered public school teaching, expecting an external benefit such as participating in the study abroad program through the University of Havana. Former teachers who began their employment in the 2000s, either left for a better teaching environment in the private sector or temporarily came back to public school to find possible clients for private tutoring.

The three groups of teachers who began their employment before the 2000s seemed be more hesitant or even resistant about exploring alternative options in the private sector, compared to their younger cohorts. The group of teachers who continued after retirement demonstrated their strong commitment and solidarity to teaching and intended to contribute to teacher coverage as long as their health permitted. The cohort of teachers who entered public school teaching during the Special Period was more proactive about their departure: They either had tried to leave but failed, due to the emotional attachment to the public education system, or finally determined to leave after a long internal debate. A teacher, who began teaching in the 1980s, decided to stay until she was eligible to retire in three years, yet wished to retire completely, due to the perceived challenges that she believed were relatively new in public schools.

Exosystem

Factors in the exosystem included the two key forces that generated teacher shortage and teacher exodus: *1) the teacher salary* and *2) the alternative jobs for public school teachers*. These factors go hand in hand in the sense that without the latter, a destination for public school teachers who were not satisfied with their salary, there would likely be less teacher exodus or teacher shortage. The following illustrates how each factor manifested distinctively across the

different groups of teachers.

In terms of teacher salary, the group of student teachers and the recent graduates of UCPEJV compared it to the salaries available for them in the private sector and, in turn, considered either not pursuing public school teaching (student teachers) or had already left for the private sector (the recent graduates of UCPEJV). The former teachers, who began their employment in public schools in the 2000s, either had left and taught in the private sector or held non-teaching jobs in the private sector, though they identified teaching as their favorite profession thus far.

The cohort of teachers employed during the Special Period paid less attention to the possible salaries in the private sector, compared to their younger counterparts. They seemed to mechanically reiterate that the education and health were the two sectors that were paid most in the Cuban society, unaware of – or consciously ignoring – the fact that since 2014, teacher salary had become lower than the national average. Given the mismatch between what they believed in and what goes on in reality, this cohort included a variety of informants who reacted differently to the perceived teacher salary: some managed to stay in the public education system by complementing it with other resources from the private sector, while others indicated that they could not afford to stay and decided to leave.

The last two cohorts of teachers did agree with the rest of the cohorts in terms of the current teacher salary being low; however, these teachers argued that it could be managed by the meticulous planning of spending and that the teacher's salary could not be justified as a legitimate reason for departing the profession. Indeed, they criticized those who had left, showing their disappointment and hostility towards those who had abandoned teaching, unlike

the other cohorts who considered it to be an individual right.

The three groups (student teachers, teachers as well as former teachers who entered the preservice program or began their employment in public schools after the 2000s) were able to easily map out the alternative jobs that were available for public school teachers. Overall, they seemed knowledgeable about the changes occurring in the labor market and about how they could take advantage of the employment policies and regulations for teachers. This was not limited to jobs in the private sector. They were open to all possibilities of enhancing their income, by combining the pay from the public and private sector, or even solely focusing on the jobs in the public sector that paid them a higher salary than teaching.

On the other hand, the cohorts of teachers who entered teaching before the 2000s seemed to be oblivious, intimidated, and sometimes resistant about the idea of exploring alternative jobs other than public school teaching. Nevertheless, two teachers stood out and entailed the attitude and behavior of their younger cohorts: a teacher who recently determined to leave due to financial constraints and another teacher who continued after his retirement. The latter teacher in his 60s, for example, started teaching only ten years ago due to desire to reduce the teacher shortage. He was an interpreter who considered teaching in public schools as a social responsibility. Unlike his peer, he seemed to resonate more and understand the mentality and the priorities of the youth that oriented toward the financial rewards.

Macrosystem

1) General values and *2) the perspectives about the government* were the two factors in the macrosystem that informants took into consideration when making an occupational decision. For two former teachers who were employed in public schools in the 2000s and a recent graduate

of UCPEJV, they decided to leave or not enter public school teaching based on these factors. Nonetheless, the same factors served as sources of motivation to adapt to the challenges and stay resilient in teaching for the three groups of teachers who began working for the public education system before the 2000s.

As for the values and priorities that guided their occupational decisions, the younger generation, who entered the preservice program and public school teaching after the 2000s, was oriented by the concepts such as efficiency and financial rewards. The perceived low teacher salary alone provided them with a strong rationale to consider a departure. Teachers, who began their employment before the 2000s, on the other hand, based their decision on loyalty, commitment to the public education system, and the needs of the society, which reflected their priorities on the social wellbeing rather than individual benefits. When these values were practiced throughout the difficult times in Cuba, they translated into resilience, tolerance, and adaptability, which together define Cuban identity. A former teacher who began his employment in the 2000s no longer found these values among Cubans, and because of this perception along with other factors, he decided to leave the country.

The distinct values that informants held in transitional Cuba mirrored their incongruent perspectives toward the government and its policies. The younger cohorts, who recently graduated from UCPEJV and a former teacher who began working in public schools in the 2000s, without any reservation expressed the criticism toward the current leadership. They viewed the government as corrupt and incompetent because it let the structural problems decay the society. Teachers, who began their employment before the 2000s, at times disagreed with the teacher policies; however, they expressed a relatively high level of trust in the government as an

entity that serves the population and wished to contribute to that effort.

8.3 Implications

Implications for theory

The findings of this dissertation study confirmed, contradicted, and extended what is known about teaching as a profession and the aspects that teachers consider when making an occupational decision. Chapter 2 mainly discussed what constitutes teaching and how teaching manifested differently across contexts. It outlined the elements of teaching as a profession, including teacher training, social status, teacher salary, and job satisfaction. Chapter 3 probed into how these aspects were translated in a specific context, in transitional states where their economic model shifted and opened to the market economy, notably post-Soviet countries and China. Chapter 5 introduced ecological systems theory and human capital theory of occupational choice as a guiding conceptual framework to analyze the teacher shortage issue in Cuba. This section outlines the implications for theories and related research findings that helped to frame this study.

In terms of teacher training, for example, it is becoming more common that countries are expecting teachers to hold a bachelor's degree when entering employment (Chang et al., 2013). Cuba, in contrast, reduced the minimum requirement to the completion of upper secondary program for the elementary school teachers and a few subject teachers in middle school. Still, to become middle school teachers and above, one needs to graduate from the pedagogical science university or a pedagogical faculty in a comprehensive university. However, beginning in 2013, the years required to obtain a bachelor's degree in education (and most other fields) were reduced from five to four. Moreover, the preservice programs in Cuba now accept any applicants

to ensure a sufficient number of graduates, mirroring the low selectivity in teacher colleges in the US focusing on a large production of teachers rather than a smaller, more selective group of high competence and prestige (Lortie, 1977).

The low selectivity in teacher training is linked to the low social status of teachers. Lortie (1977) defined the status of teachers in the US as "special and shadowed" in the sense that teachers are praised for their service to the society yet disdained as having an easy job. The economically transitional state of Cuba is reflected in a mixed social status of teachers: it ranged from the headteacher with a great reputation in the education community, who still professionally coaches junior teachers and brings prestige to her school, to the teachers with decades of experience who recently began to identify the lack of respect from students and parents to be a major challenge in public schools, and to student teachers at UCPEJV who felt shameful and tended to disguise the program they attend, due to its low selectivity (and the apparent limited commitment of their fellow students).

The lowered social status of teachers is again linked to the lack of acknowledgement as professionals and lack of autonomy in what and how they teach in the classroom (Day et al., 2000). In Cuba, the recent implementation of frequent monitoring visits by the government officials and prescribed lesson plans with little room for adaptation were the complaints by a teacher with almost forty years of teaching experience. The lack of autonomy occurred to her as one of the main reasons to discontinue her work as a teacher after reaching retirement age.

With regard to the teacher salary in Cuba, it used to be relatively high, falling under the category of successful models such as Finland and Singapore (Auguste et al., 2010). However, it plateaued for two decades and became lower than the national average, which mirrors the cases

of many OECD countries (Schleicher, 2011). The ongoing teacher exodus, that is unstoppable according to the informants, can partially be explained by the concept, "price-elasticity." Schleicher (2011) argued that when the teacher salary is relatively high, the level of in and out mobility of teachers is low; however, when the salary is low, the mobility of teachers, in most cases, attrition, grows.

Days and his colleagues (2006) argued that job satisfaction of teachers derives not only from the extrinsic motivation, but also from intrinsic motivation, which was the case for the informants of this dissertation study. Given the perceived low salary, poor teaching environment, and a growing number of alternative jobs for the public school teachers, those who were drawn to teaching by sources of intrinsic motivation, such as the love for working with students, solidarity to teaching, and social responsibility, persisted, and those who did not, left teaching.

Chapter 3 analyzed how the opening of the market economy impacted teachers and the education system in countries in transition, such as the post-Soviet countries and China. Overall, the economic constraints experienced in post-Soviet countries seemed more severe than the current situation in Cuba. Bacon (2014) noted that after the collapse of the Soviet Union, teachers in Russia were unpaid for months, and in Central Asia, their salary declined precipitously (Silova, 2009) to a third of what the government announced as an adequate salary to live on (DeYoung et al., 2006). In Cuba, there has been announcement of reduced government investment on education (PCC, 2011); however, the government expenditure on education as a percentage of GDP is expected to be higher than the world average (e.g. 12.84% (Cuba) vs. 4.58% (the world average) in 2010, World DataBank), and teacher salary was stagnant, never

reduced[70].

The prolonged decline of teacher salary in the post-Soviet countries brought about their decline in status in these societies (Maslinsky & Ivaniushina, 2016; Silova, 2009): that is, the standing of teachers, once located near the top of the social ladder, was demoted to a position toward the bottom of the hierarchy. In case of Cuba, a mixed social status of teachers can be partially explained by the constant investment in education and the stagnant teacher salary. Considering the increased living cost in Havana, however, without an "adequate" salary, the social status of teachers at least in the capital city is doomed to follow what happened in the post-Soviet states.

Although financial constraints were not as severe in Cuba, teaching and learning environment in public schools was largely deprived, and the lack of teaching staff became an ongoing issue, conforming to the situations in post-Soviet countries (Bacon, 2014). Moreover, at least some Cuban teachers who are still in service covered multiple shifts, taught oversized classrooms, and worked on multiple jobs, similar to teachers in post-Soviet countries (Niyozov & Shamatov, 2010; Silova, 2009). Some, in the end, departed to work in the private sector that had more access to higher wages and to foreign currency, resembling the teacher dropouts in China, after its economic reform in 1978 (Leung & Hui, 2000; Sargent & Hannum, 2005).

The patterns of teacher exodus or teacher shortage evident in Cuba largely mirrored those in China and post-Soviet countries with small dissimilarities. For example, teachers from the eastern provinces in Cuba were frequently relocated to Havana, similar to how Chinese teachers travelled to coastal provinces to make up for shortages in these areas. The coastal provinces were

[70] Teacher salary in Cuba remained stagnant around $20 a month, after Fidel Castro increased it by 30% in 1999 to prevent further drop outs of teachers (Sobe & Timberlake, 2010).

assigned as special economic zones and attracted foreign investment with a fast growth in commercial and private sector. Given this relocation, China and also the post-Soviet countries experienced more pronounced teacher shortage in the rural areas, while the eastern provinces in Cuba continue to serve as a stable source for teacher supply in Havana and Matanzas (a province with extensive tourism), without much shortage in the eastern provinces.

Alternative professions for public school teachers play a central role in teacher exodus: both cases in Cuba and Kyrgyzstan confirmed that the subjects such as foreign language and informatics experienced more shortage of teachers than others, because of the available jobs that teachers can obtain in the commercial sector with a better income (Silova, 20099). Age, which mattered to the occupational decision making of some Cuban teachers, was also relevant to teachers in the post-Soviet Russia. According to Maslinsky and Ivaniushina (2016), the average age of teachers in Russia was higher than the national average in 2013, which indicated the challenges in teacher recruitment and the retention of early-career teachers in the country, the same problem that Cuban education currently encounters.

The opening of the market economy not only impacts the salary that teachers get and the condition of public schools where teachers work, but the way teachers perceive and practice their profession. Silova (2009) observed that when teachers embody market principles, they construct entrepreneur identity and begin to approach teaching as a provisional service in exchange for money. This was the case of the informant, Jesus, who temporarily came back to teaching to search for potential clients for private tutoring. Heyneman and DeYoung (2006), however, illustrated the identity crisis that this shift in ideology causes teachers in Tajikistan, which was reminiscent of one of my informants, Pablo, who struggled to survive in the private sector driven

by capitalistic values, but which made him feel disoriented and decide to leave.

Chapter 5 introduced Bronfenbrenner's ecological systems theory and human capital theory of occupational choice to be a guiding conceptual framework to analyze the teacher shortage issue in Cuba. Combining the two theories was critical to establishing a robust conceptual framework, because the former allowed to locate individual teachers within in a larger context with multiple layers, and the latter approached them more as active agents who reflect on their situation, weigh various options, and opt for what they perceive to generate the most benefit for their wellbeing.

This study confirms Bronfenbrenner's (1979) argument that "aspects of environment beyond the immediate situation" (p. 21), what he referred to as ecology, must be holistically examined to understand and explore human development, in the case of this study, teacher's occupational choice. Depending on the individual, or a group of individuals, they tended to make occupational decisions based on a particular layer or level of factors, more than others. For example, for those informants who entered teaching during and before the Special Period, many entered teaching because the country needed more teachers and they wanted to contribute and respond to that call, which is a high level factor (exosystem and macrosystem) and a factor that was not identified among younger cohorts.

This study also greatly benefitted from the temporal dimension of the ecological systems theory. By acknowledging the shifts in ecology over time, the study was able to capture and highlight different groups of informants, who lived through different time periods and made various occupational choices. All informants experienced and navigated contemporary Cuba in transition; however, the way they navigated differed based on the time periods they entered and

experienced. I argue that the Special Period was one of those determinant periods and provided a new system of ecology for Cuban teachers and influenced their occupational decision making, be it to enter, remain in, leave, or re-enter the teaching profession.

In terms of human capital theory of occupational choice, this study confirmed that individuals placed more value on monetary or on non-monetary benefits and, therefore, made occupational decisions centering on them. Those who placed more value on monetary benefits tended to change occupations frequently, always in search of better paying options. Those who were driven by non-monetary benefits tended to make their decisions on fellow teachers, the necessity of the country, and love for teaching and teaching as a profession; thus, they were more likely to remain in or re-enter teaching.

Implications for research methodology

For this dissertation study, I largely drew upon two qualitative research methods, document analysis and semi-structured interviews. I believe this combination was relevant and useful, because the document analysis provided me with the context, the landscape of historical and contemporary Cuban education, and the semi-structured interviews complemented it by offering a more detailed picture, vibrant stories and explanations as to what went on at the ground level. I believe that the main contribution of my study to the qualitative research method is that I was able to listen and collect the voices on the ground, in this case, teachers with different career histories navigating contemporary Cuba, and shed light on experiences and perspectives of those who are commonly unheard. This study represents them by bringing in a variety of their voices and delivering them in a most vibrant and lively way.

I had once thought about conducting a mixed method research by incorporating

quantitative methods to tease out the patterns of teacher attrition, based on teacher salary, and thus to predict the phenomenon of teacher shortage in the future. However, the findings from multiple in-depth interviews confirmed that the process of occupational decision making is extremely complex and governed by so many factors (both measurable and non-measurable) that even though a shortage rate could be computed, assuming that the data were accessible, it would be challenging to explain variations in teacher shortages across provinces and over time.

Speaking of data, I primarily depended on the open source provided by the National Office of Statistics in Cuba (*La Oficina Nacional de Estadísticas de Cuba*, ONE) as the guiding information that may signal the potential teacher exodus and/or shortage at the time. The statistics data from ONE offers a variety of information about the teachers in Cuba: for example, the number of total teaching population by the level of education and by province, and teacher salary relative to other professions in the public sector. Along with this information, I reviewed the relevant journal and newspaper articles, such as from *Granma* (by the Cuban Communist Party) and *Juventud Rebelde* (by the Union of Young Communists), and used the results to either craft interview questions or confirm the discussion during the interview.

What could have been improved in terms of the data would be the access to the data from the Ministry of Education that would allow reviewing the number of teacher dropouts and shortage across the timeline. However, as outlined in Chapter 6, my application for a research license was rejected by the Ministry of Education in Cuba and, therefore, my research was unauthorized and carried out under the status of a tourist visa (but with the support of the Asociación de Pedagogos de Cuba, the Association of Cuban Educators). This implied that I had to recruit informants based on a personal network of an individual, which in my case was the

research assistant whom I hired for this dissertation research. This unique recruitment strategy brought about both advantages and disadvantages to this study.

The greatest advantage of utilizing personal network of the research assistant for this study was that it allowed me to conduct data collection. It is uncertain how I could have recruited this number of participants with such level of diversity in profiles (in terms of when they entered the profession), if it were not for the assistance of my research assistant. Her profile in fact critically tapped into all criteria of informants I sought in this dissertation study. My research assistant, who was a young teacher from Havana, who recently graduated from UCPEJV, taught English in middle school and in a private home converted into classrooms. By relying on her social network, I was able to recruit individuals with whom she interacted throughout her career trajectory.

Another huge benefit of involving my research assistant in the recruiting process was that, through her, I was able to build rapport with my informants very easily and quickly. That is, in many cases, with a brief introduction of myself, I could dive directly into the topic of my interview and engage in an in-depth conversation where the informants seemed to feel safe and shared their ideas with trust

The main disadvantages of this recruitment method were twofold. First, my sample was heavily represented by the individuals teaching or trained to teach English. Less is known about the teachers of other subjects and how they perceived and were affected by the opening of the market economy. However, given the topic of the study, which is teacher exodus and/or shortage, and coupled with the fact that English is the subject that experienced and continues to experience the most teacher dropouts and shortage, I believe it deserves a certain level of

emphasis and the distribution of sample accomplished that.

Second, the personal influence of the research assistant could have affected the narrative of the discussion during the interview. Though never sensed, given the recruitment procedure strictly carried out through the personal relationship of the research assistant, her presence during the interview may have, to some extent, influenced the way in which the informants framed or expressed their stories and their opinions. Given such possibility, my research assistant and I agreed that I lead the interview in Spanish and limit her input and translation unless it is absolutely needed.

Implications for policy and practice

This section intends to translate the findings from this dissertation study to implications for policy and practices and contribute to mitigating the problems of teacher exodus or teacher shortage in Cuba. Given this qualitative study included a relatively small, non-representative sample of preservice, inservice, and former teachers, the implications are presented as issues for consideration. They are issues for consideration by the government and the rest of the education community to help improve the recruitment and retention among the early and mid-career teachers (those who entered preservice or employment in public school teaching after the 2000s), as they experienced the highest level of departure. The following combines the result of my analytical work, messages from the informants as well as the ideas put forward by two Cuban education experts, Dr. Martha Susana Neufville Morris, the Dean of the Faculty of Foreign Language (English) Education at UCPEJV, and Dr. Gilberto A. García Batista, the President of Association of Pedagogues/Educators in Cuba, with whom I discussed the issues addressed in this dissertation study (see Chapter 6. Methodology).

Vision of education and the roles teachers play in Cuba.

What was truly surprising about the teachers across different generations was that regardless of their status (i.e., whether they had left or remained in the public education system), they demonstrated a great level of professionalism in teaching. This equally applied to the teachers with more than 30 years of experience and to the teachers and former teachers who were relatively early in their career. They all approached teaching as an art of "reaching students" (*llegar a los estudiantes*) and invested a great deal of time and thinking into mastering it based on their pedagogical philosophy and methodology.

What seemed to be missing, however, was a common ground, a common understanding among teachers from different generations, on what is expected of teachers in the classroom. That is, the younger cohorts who became teachers after the 2000s generally perceived the role of teachers as limited to being an instructor and did not reference the teacher's role in Cuban society as a social equalizer. Both Martha and Gilberto lamented that the social inequality is rising in Cuba and that it has become more and more evident in the classroom by the way students dress and come to school (e.g., their shoes, their backpacks, and the type of snacks they bring in a lunch box). These all reflect the different levels of financial resources available to students from their families. Gilberto considered this to be extremely concerning because of the unique role that public schools and teachers have played –and should continue to play – in Cuban society:

> School is like a small society where you mix all kinds of people, their differences and everything. Teachers address these differences, and that is why it is so important to have a teacher well prepared with a culture that helps the student. And that is why we prioritize

teachers, because of the role that teachers play in our country.

The younger generation (who became teachers after the 2000s), however, did not seem to internalize this role of teachers and education or to resonate with it, because they no longer perceived Cuba to be socialist, in the sense of aspiring to be equal. What was provided by the government, equally for everyone, was not enough. To enter UCPEJV, for example, many of them had to prepare their college entrance exam with the help of a private tutor; during practicum they were able to see that there is a huge learning gap in the classroom based on students' access to private tutoring, or as a parent, had to hire a private tutor to make up for the low quality of education their children received from the public education system.

Transitional Cuba hosted three groups of individuals, none of whom felt adequately represented in their society: 1) the oldest generation (who became teachers before the Special Period) felt the nostalgia for the Revolutionary society and were disappointed at the young generation who seemed to take education for granted; 2) another group of teachers (who entered during the Special Period) was lost in between generations and struggled to navigate the transitional state; and 3) the youngest generation (who entered after the Special Period) did not believe in the capacity of the government and perceived the public education system to be obsolete and distant from the reality. What seemed lacking, therefore, is a shared vision across generations on education in Cuba – where they want education to take Cuba – and the role that schools and teachers play in shaping society, taking into consideration and negotiating the demands from the new generation of the teaching force.

Teacher salary.

The group of teachers who began teaching before the Special Period argued that instead

of increasing teachers' salary, addressing directly their actual needs would be more effective in terms of encouraging individuals to enter and remain in teaching as well as re-attracting those who had left the classroom (e.g. providing materials to build houses, an idea suggested by Martha and Elena). However, the result of this qualitative research indicated that their idea needs to go hand in hand with the increase of teacher salary and not be mutually exclusive. In fact, 10 out of 16 informants (who entered preservice or employment in public schools during and after the Special Period) identified low perceived salary to be a main reason to leave, to plan to leave, or to debate whether to enter public school teaching or not, even though they enjoyed teaching and/or working with children and youth.

For example, Laura, a student teacher from UCPEJV majoring in Foreign Language Education, argued that the teacher salary needs to be on par with the salary that they can get paid for teaching in the private sector. She believed that this was paramount and fundamentally the solution to teacher exodus and shortage, because many teachers leave for the salary, not because of the nature of the profession. Matias called for a teacher salary that was equivalent to what was available for service jobs in the private sector, which do not even require a bachelor's degree. He argued that by working at a bar, one can make 600 to 700 CUCs a month, which was thirty times as much as the average public school teacher salary in 2017 (ONE, 2018b).

Given the critical role that teacher salary seems to play in occupational decision making in contemporary Cuba, teacher salary needs be reanalyzed and reassigned. One possible option is to retrogress to the time under Fidel Castro when it was at the top of the pay scale in the public sector (Gasperini, 2000), reflecting the government's two priorities in education and health. As of 2017, the job that was paid the most in the public sector was sugar refining and/or harvesting

(1,236 CUP), compared to teachers who were only paid 533 CUP (22 CUC), representing less than a half of the top salary as well as one of the lowest paying jobs in the public sector.

I stand on the side of the informants who argue that teacher salary is "unjust" for the following two reasons: First, the government allocates almost a quarter of its budget to education, yet teacher salary is one of the lowest in the public sector. According to the Minister of Finance and Prices, Meisi Bolaños Weiss, covered in Granma[71] on December 2019, 24% of the government spending was allocated to education for 2020, and education and health alone exceeded half of the government budget, yet public school teaching remains near the bottom of the pay scale[72].

Second, it is unclear why teacher salary has remained stagnant for almost two decades when the Cuban economy grew more than three times during the same time period. Per capita GDP in Cuba as of 2017 was US$ 8,540, reaching closer to the regional average in Latin America and the Caribbean (US$ 9,400 and still higher than Peru (US$ 7,000), Colombia (US$ 6,650), and Ecuador (US$ 6,340) (World DataBank), whose teachers are paid more than the US$ 22 a month that Cuban teachers receive on average[73]. I believe that the government owes educators and other members of the society an explanation about how and why it reached the calculation of teacher salary. Moreover, I believe that there needs to be greater transparency about spending in education and other sectors, so the lost trust can be recuperated, particularly from the younger generation.

[71] http://www.granma.cu/cuba/2019-12-20/presentan-el-presupuesto-estatal-de-cuba-un-presupuesto-historicamente-social

[72] The average monthly salary of health sector workers in 2017 was $35, which was above average of public education personnel ($22) and the national average ($32) (ONE, 2018b).

[73] For example, the monthly average of teacher salary in Peru and Colombia in 2013 was $518 and $1,129 respectively (OECD, 2014).

Teaching environment in public schools

Moreover, the younger generation called for an update in all aspects of public school teaching. They called for not just an improvement in school facilities and equipment (e.g., having access to computers), but a comprehensive education reform that involves the revision of the national curriculum, updating of teachers' guides and textbooks (making them relevant to the 21st century), and revisiting the instruction time and differentiating hours based on the level of education. No informants, in fact, had specifically outlined that the improved teaching environment would motivate individuals to enter, remain, or return to public school teaching; however, it was one of factors across generations (12 of 22 informants) on which teachers based their occupational decisions.

I believe redefining the structure of school evaluation will also enhance the teaching and learning environment in public schools in Cuba. Both Matias and Jesus condemned school culture that they perceived to be deeply ingrained with the practices of grade inflation. It is linked to the resource allocation method of the Ministry of Education, which provides more resources to schools where students perform better. Matias found this practice to be unfortunate and irresponsible on the part of the government, because it encourages teachers to inflate student performance and disguise the learning problems at the classroom level. Coupled with the monitoring and punishing the false reporting by school leadership, an additional measure to consider would be to rearrange the evaluation mechanism to focus on the students' improvement in performance, measuring the difference between their pre- and post-academic year, and provide more resources to schools with greatest learning achievements as well as those that struggle with improving students' academic performance.

Selectivity in the preservice program.

The major change that occurred in terms of the teacher training was the reopening of the pedagogical school in 2010. By bringing the minimum requirement of all primary (and some lower secondary) school teachers to be the graduates of upper secondary schools, the government began recruiting individuals with much less schooling. For the greatly reduced selectivity it brought about, it is important to revisit and reconsider whether this policy is an effective pipeline[74] for teacher supply.

The reopening of pedagogical school and bringing down the minimum requirement for teachers to upper secondary education significantly reduced the selectivity of teachers, reflecting on the enrollment rates of secondary and tertiary education in Cuba. In 2017, the enrollment rate in tertiary education in Cuba was 40% (World DataBank), which means if the original policy was kept, which required a bachelor's degree for all teachers, their overall academic performance would have been above average and the selectivity of teachers would have remained high. However, currently, there is a universal enrollment at the secondary level in Cuba (World DataBank) and combining it with the current career aspirations of youth which do not include teaching, those who enter the pedagogical school tend to be the least competent performers in Cuban society (see Chapter 7, a section on Alonso). Currently, almost anyone can become a teacher in Cuba.

In terms of diversifying the training backgrounds of teachers (i.e., including teachers who are graduates of pedagogical schools as well as graduates of UCPEJV or pedagogical faculties in

[74] Individuals prepared in the pedagogical school are encouraged to pursue a bachelor's degree once on the job. However, teachers frequently drop out after obtaining a bachelor's degree, which was noted by Joaquin and evident from the case of Angela and in turn, fail to contribute to increasing the overall selectivity of teaching personnel in Cuba.

other universities), Gilberto noted that even though it compromises the quality of teaching, it is an only way to recruit enough teachers to keep schools open. If the pedagogical school is necessary, it is paramount for the government to seek complementary ways (e.g., increasing teacher salary and improving teaching and learning environment) to enhance the selectivity of student teachers, given its consequences for the diminishing quality of education and the declining social status of teachers in Cuba. In addition, revamping the interview portion as part of the entrance exam in order to gauge students' intrinsic motivation, such as commitment and enthusiasm for teaching and/or working with children and youth, would be an idea to broaden the criteria for selection beyond that of academic capability.

Family integration to the public education system.

Various informants noted disciplining students in the classroom as one of the main challenges in public school teaching: The cohort of teachers who entered employment after the Special Period (Alonso, Jesus, and Pablo) perceived it as students' lack of motivation to learn, while teachers who entered employment during and before the Special Period (Veronica, Mercedes, and Natalia) took it as the lack of respect toward teachers. They believed it derived from families that no longer valued education, which in the deeper level has also to do with the cultural shift in Cuba since the opening of the market economy.

Another way to interpret this phenomenon is lack of trust of the quality of public school teaching on the part of the parents, evidenced by the ever-growing private tutoring in Havana, and not only for English language. Therefore, it is important to regain and revisit the role that public schooling plays in Cuba by socializing the discussion and communicating with parents to revamp the triangle of school – teacher – home, which illustrates that education begins in the

home and continues in schools (and homes).

8.4 Conclusion

I believe the key contribution of this dissertation study to the field is its focus on the voices of the group of individuals traditionally unheard, that is, student teachers, teachers, retired teachers, and former teachers, and document their experiences navigating the transitional state of Cuba, which is taking place due to the opening of the market economy. There are multiple literatures that elaborate on the economic shifts and the educational policies in Cuba; however, little has been investigated into the relationship between the two, let alone between the economy and the teaching force. Given the unique topic that is rarely discussed and the central role that Cuban teachers have played – and need to continue to play – in constructing socialist Cuba, this study is worth the attention and contributes extensively to the field.

As a future study, two topics come to mind. First, given that this dissertation study focused on the teachers in Havana, it would be interesting to see how the teaching force, especially in the eastern provinces, has experienced the impact of the market economy. Rodolfo and Humberto, the two supervisors from the eastern provinces, showed high confidence in Santiago de Cuba, arguing that the quality of education is much better, in terms of teacher preparation, teacher retention, student behavior, etc. It is worth probing into the differences across regions.

Second, I have a personal research interest looking into how the changes in the economy impacted teachers in North Korea. North Korea experienced (though continues to experience) an economic hardship labeled as the Arduous March or the March of Suffering, a period of mass starvation, which began during the period 1994 to 1998 (Baek, 2019; French, 2015; Hastings,

2016) overlapping the Special Period in Cuba. Since visiting North Korea is currently not legal for South Korean and U.S. citizens, I would like to conduct a qualitative research in China, the areas that border North Korea and recruit North Korean refugees who can participate as informants. While such informants are likely to have somewhat biased perspectives on the situation in North Korea, their voices could inform our understanding of factors that motivate individuals to enter, remain in, and leave teaching.

Appendices

Appendix A: Interview Protocol – Cuban Teachers (Student teachers, current teachers, retired teachers, former teachers, and supervisors)

Student Teachers

Thank you for participating in this interview. I will start by asking some questions regarding your personal and professional background and we will also talk about your thoughts on teachers and teaching. Your name, answers, and the information you provide in this interview will remain confidential.

1. What institution do you attend? What year are you in and what is your major/program?
2. When you applied for this institution, why did you want to become a teacher? What are the aspects that you considered?
3. Where do you live and for how long have you lived there?
4. What do your parents do? Do they support your idea of becoming a teacher?
5. Do you have a part-time job? What do you do?
6. What does being a teacher mean to you?
    a. What aspects in teaching motivate you?
    b. What aspects in teaching discourage you?
7. When you graduate where do you want to teach and why?
8. With your degree (a high school or a bachelor's degree) in teaching, what other jobs do you think you can take?
9. Do you know anyone that dropped out of school before completing the program or graduating?
    a. Who was it and why did s/he leave school?
    b. What does s/he do now, and do you think s/he enjoys the job (or other activity)?
    c. What do you think about her/his departure?
10. Roughly in your cohort in your program, what percentage of students do you think will pursue a career in teaching?
    a. Of those who enter the profession, what percentage of your peers do you think will stay in teaching more than the two-three years of social service?
    b. Please explain the reasons for your answers.
11. Do you think the problems in teacher recruitment and retention impacted the public perception of teachers?

    a. What about on the quality of education in Cuba?
12. What do you think will be the situation of teacher shortage in the future?
    a. To what extent do you see a problem of recruiting people to enter training and recruiting students from these programs to enter classroom teaching?
    b. To what extent do you see a problem of teacher exodus?
    c. What policies need to be in place to encourage teacher recruitment and retention?

Current Teachers Including Retired Teachers[75]

Thank you for participating in this interview. I will start by asking some questions regarding your personal and professional background and we will also talk about your understanding and experience in teaching as well as your opinion about the changes in the teaching force after the Special Period. Your name, answers, and the information you provide in this interview will remain confidential.

1. Where and what grade(s)/subjects do you teach?
2. How long have you been teaching in this school?
3. Did you previously teach at other schools? If so, where and what grade(s)/subjects did you teach?
4. What is your education background (i.e. what upper secondary and/or tertiary programs did you participate in)?
5. Are you originally from Havana? If not, how was your experience transitioning to the school community in Havana?
6. Are you married (or have a partner)? What does your partner do? Do you have children?
7. When did you begin teaching and why did you want to become a teacher?
8. Do you enjoy teaching? Why?
    a. What does teaching mean to you?
    b. What aspects in teaching motivates you?
    c. What aspects in teaching discourages you?
9. What were the aspects you considered when you entered teaching (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
10. When did you first make your decision to become a teacher? Was it an easy/difficult process? Why?

[75]Based on the status of the retired teachers (i.e. whether they continued or discontinued teaching after the retirement), interview questions were adjusted.

11. As an alternative, what other jobs you think you can take? What aspects in teaching compared to the alternatives are more attractive? What aspects are less attractive?
12. Throughout your teaching career, when was the time that teacher exodus occurred the most? Do you think the exodus diminished or grew over the years?
13. Have you ever considered leaving teaching? What motivated you to stay?
14. Are you aware of any colleague who left teaching to pursue another profession or for some other reason (why)?
    a. Who was it and what and where did s/he teach?
    b. When and why did s/he leave teaching?
    c. What was the alternative profession (or other activity) that s/he pursued?
    d. How easy/difficult do you think it was for her/him to make that decision? Why?
    e. What do you think about her/his departure?
15. (Applied to Returning Retired Teachers) When did you initially retire and return to teaching? Why did you return to teaching? How different has your teaching experience been compared to that before your retirement?
    a. Was there a change in the teaching environment(s)? How?
    b. What about the teaching quality of your colleagues?
    c. What about teachers' social status?
    d. Any changes in parental involvement in students' learning?
16. (Applied to Teachers at the Pedagogical School) In your opinion, what are the aspects that students consider when entering, remaining, or leaving your institution (e.g. Monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
17. (Applied to Teachers at the Pedagogical School) In one cohort, roughly what percentage of students do you think do become teachers? And roughly what percentage of students do you think they stay in teaching after graduating from the pedagogical science university?
18. (Applied to Teachers at the Pedagogical School) Tell me the most recent student you know who left the institution before completing the program or graduating. Who was it and what was her/his major?
    a. When and why did s/he leave the institution?
    b. What was the alternative profession that s/he pursued?
    c. How easy/difficult do you think it would have been for her/him to make that decision? Why?
    d. How did her/his colleagues (i.e., student peers) at your institution think about her/his departure?
19. (Applied to Teachers at the Pedagogical School) How do you perceive the future situation in terms of recruitment and retention of students in your institution?

    a. Will they improve based on the current policies, programs, etc.?
    b. What additional policies, programs, etc. do you think need to be put in place to mitigate or avoid problems in the future?
    c. What kind of advice would you like to give to students or young teachers that are considering leaving teaching?
20. Do you think the teacher shortage problem affected public perceptions of teachers (e.g. teacher performance, teacher professionalism, teacher motivation, etc.) and the quality of education in Cuba? How?
21. Moving forward, what are your thoughts on the shortage issue?
    a. Do you think that the teacher exodus will likely continue?
    b. Do you think teacher recruitment will be a serious problem in the future?
    c. Will the shortage problem be solved based on the current policies, programs, etc.?
    d. What additional policies, programs, etc. need to be put in place to encourage teacher recruitment and retention?

Former Teachers

Thank you for participating in this interview. I will start by asking some questions regarding your personal and professional background and we will also talk about your experience as well as your departure from teaching. Your name, answers, and the information you provide in this interview will remain confidential.

1. Where and what grade(s)/subjects did you teach?
2. For how long did you teach?
3. What is your education background (i.e. what upper secondary and/or tertiary programs did you participate in)?
4. Are you married (or have a partner)? What does your partner do? Do you have children?
5. When did you begin teaching and why did you want to become a teacher (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
6. Did you enjoy teaching? Why?
    a. What did teaching mean to you?
    b. What aspects in teaching motivated you?
    c. What aspects in teaching discouraged you?
7. What do you do? Do you enjoy your current job?
    a. What are the positive/negative aspects about your current job?

8. When and why did you leave teaching? What aspects did you consider when you made that decision (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
9. Tell me more about your decision-making process of leaving teaching. How easy/difficult was it and among the aspects you considered what played as critical factors?
10. When you left teaching, what did your colleague think about your departure?
    a. What about your family members?
11. What do you think about the teachers who newly enter/stay in/return to the field? What do you think their main motivations are?
12. Do you think the teacher shortage problem affected public perceptions about teachers (e.g. teacher performance, teacher professionalism, teacher motivation, etc.) and about the quality of education in Cuba? How?
13. Moving forward, what are your thoughts on the shortage issue?
    a. Do you think that the teacher exodus will likely continue?
    b. Do you think teacher recruitment will be a serious problem in the future?
    c. Will the shortage problem be solved based on the current policies, programs, etc.?
    d. What additional policies, programs, etc. need to be put in place to encourage teacher recruitment and retention?

Supervisors

Thank you for participating in this interview. I will start by asking some questions regarding your personal and professional background and we will also talk about your understanding and experience in teaching as well as your opinion about the changes in the teaching force after the Special Period. Your name, answers, and the information you provide in this interview will remain confidential.

1. Which municipality in Havana do you work for? Since when have you started working as a Supervisor?
2. Did you previously teach in schools? If so, where and what grade(s)/subjects did you teach?
3. What is your education background (i.e. what upper secondary and/or tertiary programs did you participate in)?
4. Are you originally from Havana? If not, how was your experience transitioning to the school community in Havana?
5. Are you married (or have a partner)? What does your partner do? Do you have children?

6. When did you begin teaching and why did you want to become a teacher? What does teaching mean to you?
7. What were the aspects you considered when you entered teaching (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
8. When did you first make your decision to become a teacher? Was it an easy/difficult process? Why?
9. Do you enjoy working as a Supervisor? Have you considered returning to teaching in the classroom?
10. As an alternative, what other jobs you think you can take? What aspects in teaching compared to the alternatives are more attractive? What aspects are less attractive?
11. Throughout your teaching career, when was the time that teacher exodus occurred the most? Do you think the exodus diminished or grew over the years?
12. Have you ever considered leaving teaching? What motivated you to stay?
13. What is the teacher coverage situation in your municipality? What are the measures taken by the Ministry of Education to increase the coverage?
    a. What is your opinion towards the policy? What works well and what does not?
    b. What kind of support do you provide as a Supervisor when you find teachers considering leaving the profession?
14. In your opinion, what are the aspects that individuals consider when making the occupational decision to enter, remain, leave, or re-enter teaching (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
15. Are you aware of any colleague who left teaching to pursue another profession or for some other reason (why)?
    a. Who was it and what and where did s/he teach?
    b. When and why did s/he leave teaching?
    c. What was the alternative profession (or other activity) that s/he pursued?
    d. How easy/difficult do you think it was for her/him to make that decision? Why?
    e. What do you think about her/his departure?
16. Do you think the teacher shortage problem affected public perceptions of teachers (e.g. teacher performance, teacher professionalism, teacher motivation, etc.) and the quality of education in Cuba? How?
17. Moving forward, what are your thoughts on the shortage issue?
    a. Do you think that the teacher exodus will likely continue?
    b. Do you think teacher recruitment will be a serious problem in the future?
    c. Will the shortage problem be solved based on the current policies, programs, etc.?
    d. What additional policies, programs, etc. need to be put in place to encourage teacher recruitment and retention?

Appendix B: Interview Protocol – Experts on Teacher Education in Cuba

Thank you for participating in this interview. I will start by asking some questions regarding your personal and professional experiences and we will also talk about various teacher coverage policies throughout the history in Cuba.

1. Tell me about your current job in the APC[76] or at the pedagogical science university. What do you do?
2. When did you begin working at the APC or at the pedagogical science university?
3. Throughout the history of Cuba, how differently has the government responded to the shortage issues?
    a. What kind of teacher policies was in place to address the shortage issue after the Triumph of the Revolution in the 1960s?
    b. What about the teacher policies in the 1970s and the 1980s? In what ways were they different from those in the 1960s?
    c. What about teacher policies in response to the teacher shortage after the collapse of the Soviet Union in 1991 (i.e., during the "Special Period")?
4. Among the policies, programs, or other strategies to deal with teacher shortage what worked well and what did not?
    a. What are the examples of policies, programs, etc. that you think worked well and why do you think so?
    b. What are the examples of policies, programs, etc. that you think did not work well and why do you think so?
5. How has the government responded to the teacher shortage issue since 2000?
    a. What kind of new teacher recruitment and retention policies, programs, etc. have been put in place since 2000?
    b. Among the policies (etc.), what worked well and what did not? And why do you think so?
    c. How are they similar to or different from the previous policies (etc.)?
6. (Applied to the pedagogical science university) Since 1990s onward, during and after the Special Period, what kind of changes has your institution experienced over time?
    a. What kind of teacher education programs was provided in response to the Special Period?
    b. Were there any changes in the entry/graduation requirements, the level of teachers being prepared, the years of training, etc.?

[76] *Asociación de Pedagogos de Cuba*, the Association of Cuban Educators

    c. For those who newly entered the institution, do you think their level of performance changed over time?
7. (Applied to the pedagogical science university) In one cohort, roughly what percentage of students do you think do not become teachers?
    a. Do you think the above answers differ across the subjects/the level of education that students major (compare across General Primary, English, and Math)? How?
    b. Do you think the above answers have changed over time (compare across the 1990s, 2000s, and 2010s)? How?
8. In your opinion, what are the aspects that individuals/students consider when making the occupational decision to enter, remain, leave, or re-enter teaching (e.g. monetary benefits, non-monetary benefits, availability of alternative occupations, opportunity costs, commitment to societal goals, interest in working with children/youth, etc.)?
9. For those who newly entered teaching, what would be the determining factor that led them to make that decision?
    a. What about those who remained in teaching?
    b. And those who left teaching?
    c. And those who re-entered teaching?
10. Compared across the different groups of individuals who entered teaching in the 1990s, 2000s, and 2010s, do you think the aspects they considered have changed over time? Do you think it became easier/more difficult for them to make that decision?
    a. What about those who remained in teaching?
    b. What about those who left teaching?
    c. And those who re-entered teaching?
11. How do you think that individuals perceive their colleagues' decision to enter, remain, leave, or re-enter teaching?
    a. Did that perceptions change over time? How?
12. Do you think the teacher shortage problem affected public perceptions of teachers (e.g. teacher performance, teacher professionalism, teacher motivation, etc.) and the quality of education in Cuba? How?
13. (Applied to the pedagogical science university) How do you perceive the future situation in terms of recruitment and retention of students in your institution?
    a. Will they improve based on the current policies, programs, etc.?
    b. Is there any new or soon-to-be implemented policies, programs, etc. that is underway?
    c. What additional policies, programs, etc. do you think need to be put in place to mitigate or avoid problems in the future?
14. Moving forward, what are your thoughts on the teacher shortage issue?
    a. What do you think will happen regarding the teacher retention and recruitment?
    b. Will the shortage problem be solved based on the current policies, programs, etc.?

c. Are there any new or soon-to-be implemented policies, programs, etc. that are underway or about to be implemented?
d. What additional policies, programs, etc. do you think need to be put in place to mitigate the current shortages or to avoid shortages in the future?

Appendix C: Invitation Letter to Interview Participants

Dear participants,

My name is Changha Lee, and I am a doctoral student in the international education policy program at the University of Maryland located in College Park in the United States of America. I am conducting a research examining the issue of teacher shortage in contemporary Cuba and you are invited to participate in the study. If you agree, you are invited to participate in answering a number of questions regarding teaching, teachers, teacher policies, and your experience and thoughts around them. The interview is anticipated to take about 45 minutes to an hour and will be audio-recorded.

Participation in this study is voluntary. Your identity as a participant will remain confidential during and after the study. To ensure anonymity, audio files would be named in a way that masks your real identity and I will assign you a pseudonym while I am analyzing your data.
If you have questions or would like to participate, please contact me at changha.izzie.lee@gmail.com or at +1-240-753-5746.
Thank you for your participation,

Changha Lee, Ph.D. Candidate
University of Maryland

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