

Precarious Meritocracy: On the Affective Structure of Merit in Education

Liz Jackson

University of Hong Kong

Charles Bingham

Simon Fraser University

INTRODUCTION

Most North Americans have probably read bumper stickers saying something like this: “Proud Parent of an Honor Student at Westlake High School.” Some have read bumper stickers that answer with: “My Kid Kicked Your Honor Student’s Ass.” To put these slogans in terms of merit, the former is a celebration of those who succeed in a meritocratic system, while the latter can be construed as a rejection or criticism of the same structure. But more than celebration and criticism of educational merit, one can also read in these phrases subtle statements about affect, a matter that is often overlooked in discussions of merit. The first statement is happy and proud, while the second statement is angry to the point of violence. In this article, we intend to take the affective sentiments of these bumper stickers—*affect about merit*—more seriously than might usually be done in order to ask the following question: What does affect have to do with merit in education?

To set the stage for this, we would like to first assert that meritocracy remains somewhat of an elephant in the living room in current educational discourse. This is to say, while most progressive, critical educators would no doubt condemn the inequities resulting from practices normalized under meritocratic ideology in schools and universities, the ideal of meritocracy seems to have a unique staying power. So while critical educators carry on important practical and theoretical work to promote and sustain equity, a primary mechanism that sustains inequitable relations in education—namely the ideology of meritocracy—is rarely taken to task. We are reminded here of well-intentioned, critical-

ly-minded university colleagues who, while carrying out strong theoretical and practical work in social justice education, nevertheless fall back on a discourse of merit when talking about their own graduate students. We have repeatedly witnessed social justice-oriented colleagues who want to attract the “best and brightest” graduate students to their programs. Ironically, the metric by which these “best and brightest” are gauged too often turns out to be a fundamentally questionable meritocratic metric. Thus even graduate or postgraduate students who are canvassed to ameliorate the inequities of meritocracy are judged by merit. Indeed, day-to-day exigencies of teaching in schools and universities are so deeply ensconced in meritocratic paradigms that it is sometimes difficult to imagine a way out. For example, teachers and professors are required to give grades even though the requirement to give grades is loathsome to many critically minded educators. Some critical educators inflate grades as an act of resistance to the ideology of meritocracy. Some advocate for non-competitive forms of education. Some try to work within the so-called meritocratic system to make practices of meritocracy more equitable. In all cases, the problematic standard of meritocracy remains.

To reinforce this precarious position of educators vis-à-vis meritocracy, one can look to the difference between sociological critiques of meritocracy, on the one hand, and the critiques offered by sociologists of education, on the other. Sociologists such as Stephen McNamee and Robert Miller have long debunked the notion that any given society *can* or *should* function as a meritocracy.¹ Speaking from an American context about meritocracy, McNamee and Miller note that “Americans not only tend to think that is how the system should work, but most Americans also think that is how the system does work.”² The work of such sociologists aims to challenge the validity of commonly held assertions with regard to merit and meritocracy. Interestingly, sociologists consider educational institutions as one of the *barriers* to meritocracy. As McNamee and Miller put it: “There are a variety of social forces that tend to suppress, neutralize, or even negate the effects of merit in the race to get ahead.”³ And educational institutions are considered one of these “nonmerit” forces.

Educational sociologists, on the other hand, tend to have what might

be called an “ameliorative critique.” Educational scholars validate the discourse of meritocracy by working to ameliorate the circumstances of those who are not equally served by such a system. They tend to take the optimistic view that meritocracy can be made better. As an example, consider Jonathan Kozol’s important work exposing impoverished schools in the United States.⁴ Kozol clearly demonstrates the need to restructure educational funding so that children from impoverished circumstances are afforded their constitutional right to an education that is truly educative. The work of Kozol is cited by sociologists as proof that education is a nonmerit aspect of society. Scholars of education, in contrast, interpret such work as proof that funding allotments must be redistributed in order for schools to approach the ideals of a meritocratic system. Educational scholars indeed validate meritocratic discourse by working to ameliorate the circumstances of those who are not equitably served by such a system. They tend to take the optimistic view that meritocracy can be made better. Educational sociologists tend to see meritocracy in education as a viable paradigm, albeit a thwarted one.

Within this context of precarious meritocracy, this article inserts the lens of affect. Drawing on the work of Sara Ahmed, as well as that of Megan Boler, Herbert Kohl, and others, we will explore how affective relations structure and reinforce educational meritocracy. While it is not our intention to blame educators for validating an unjust educational and social system,⁵ our analysis calls for a deeper appreciation of affective relations within classrooms as distinctive, significant educational and sociological phenomena. We have noticed that the affective relations of meritocracy have been heretofore neglected in philosophy of education. Examining feelings and affect, we find not an easy way to abandon the discourse of meritocracy in education, nor an easy solution to the amelioration of nonmerit inequities. Rather, by exploring affect we aim to gain insight into how meritocratic ideology operates at the level of inter-subjectivity to bind students, teachers, and academics to its powerful logic. How do affective relations of individuals sustain and reinforce educational optimism and support of meritocracy in schools and universities where there is abundant evidence of inequitable opportunity? How does the ideology of meritocracy

function through affective education—that is, through the way expectations around student affect reverberate — as instructors give subtle and unsubtle lessons about achievement and excellence in so-called meritocratic contexts?

MERITOCRACY AND THE PERFORMANCE OF AFFECT

As scholars who theorize affect note, we feel emotions not simply “inside” ourselves as individuals, we develop and experience them in relations to others in the world.⁶ That is, the experience of emotional feelings involves affective movement between a person and another person or object. This view contrasts with what Ahmed calls the “dumb view”⁷ of emotions, where emotions are seen as functional responses of individuals to experiences or events. As Ahmed notes, in the dumb view, if a child sees a bear she will feel fear, which tells her to run. She argues there is more to this story, however. It is not that the bear is essentially fearsome but rather it “is a matter of how child and bear come into contact ... shaped by past histories of contact. ... Another child, another bear, and we might even have another story.”⁸ Rather than simple cause and effect, emotions are shaped by experiences of individuals in particular relations. You might be happy to see a rarely spotted bear in a national park on the roadside from the safety of a moving vehicle, but you would probably be much less happy to see that same bear follow you into your tent that night.

Because particular relations of individuals with historically and culturally framed subject positions shape emotional experiences, Boler argues that power relations impact how people feel. In *Feeling Power* she elaborates how schooling involves teaching emotional self-discipline: “For example, children are increasingly taught not to express anger, not to question authority, and not to resist those who have power. These rules are taught through differing forms of emotional discipline ... depending on their gendered, raced, or social class standing.”⁹ Psychological work on “emotional intelligence” in the 1990s has fueled a conflict resolution discourse, particularly in schools serving disadvantaged youth, that, Boler argues, individualizes and dumbs down understanding of how affect circulates dynamically, as it obscures important questions about

power relations in education, and why some schoolchildren might want to express some (resistant) emotions deemed undesirable by their teachers.

Different kinds of emotional performances are thus required by students in school settings. Today many schools have a version of what might be called an “emotional curriculum,” where an attitude of teamwork, friendliness, caring, sympathetic behavior, acceptance of failure without anger or sadness, positivity and optimism, and impulse control are encouraged, monitored, and positively recognized by teachers. Yet as Barbara Applebaum points out in examining Judith Butler’s work on performativity, within relations, performances of self are not voluntarily and autonomously authored, but are rather shaped and restricted by social norms and conventions. Whether or not we can uncover a “transcendental, prediscursive subject,” a child typically learns very quickly how to perform affectively as a student (or as a daughter or son, etc.), and learns also how to respond emotionally to events and interactions that touch the surface of himself or herself, based on reactions by others to his or her expressions.¹⁰ The child learns how and what to feel within specific identities and relations.

Meritocratic discourse is used in schools to encourage students to excel both academically and socially. For example, students receive awards for good citizenship, or for being the most caring student, or the friendliest student. Such discourse is also used to remind those who don’t succeed to act in deference to those who do. Teachers who employ this discourse in this common way expect that students affectively perform acceptance if not enthusiasm in events that are designed to reflect meritocracy, such as when students receive grades, awards, or other forms of recognition. Honor students should feel proud of their achievements. They should not cry or feel ashamed, but they should smile and in others ways indicate that they feel happy and good to be recognized as hard working, talented, responsible, etc., by peers and their teacher. (And as our bumper sticker suggests, the honor student’s parents should feel equally happy and proud.) The other students who stand beside those recognized are also expected to accept the meritocracy of their school or classroom community. They should neither cry, sulk, or show angry feelings, nor demonstrate a kind of carefree nonchalance or elation as their achievements are deemed unexcep-

tional or worse. Any of these expressions could be policed by a well-meaning teacher as detrimental to sustaining the culturally and socially appropriate affective atmosphere of the occasion. After a grueling football game, all players must shake hands across teams, the losers treading a line between honoring the significance of the winners' victory, on the one hand, and, on the other, feeling angry and resentful by rehashing close calls and chance plays.¹¹

THE AFFECT ALIEN

The bully who beats up the honor student, as in the bumper sticker, takes on the role of what Ahmed calls an "affect alien"¹² in an educational environment that cultivates meritocratic discourse and its anticipated affective relations. The affect alien is a person who does not feel in an easy or natural way the feelings that are normally attributed to objects or events. The sad bride on her wedding day, or the bride who even feels a bit uneasy that she doesn't feel as happy as it seems she should, and Ahmed's more oft-cited "feminist killjoy," are affect aliens. The feminist killjoy, for example, is an affect alien insofar as she does not affectively acquiesce to demands of happiness in the face of sexist remarks or sexist actions. Affect aliens do not feel the way that others expect them to feel (or how they perceive they ought to feel). And this mismatch risks disturbing others. It risks emotionally upsetting others.

When it comes to educational meritocracy, the affect alien is the student who feels an uncanny sense of loss even as she is seen broadly to be earning positive recognition. Or it is the successful scholar who is hurt because he or she does not find scholarship fulfilling. It is the unexceptional or failing student who mocks another's award out of rage, jealousy, envy, self-pity, or ambivalence, or who shows a complete lack of interest. As Ahmed points out, the affect alien threatens the mood and sense of affective and ideological security of the group and thus appears to others as a "sore point" of the community. As she puts it, it is not easy to be the affect alien, for "[t]o become conscious of alienation is to become conscious of how one's being has been stolen ... alienation is already, as it were, in the world."¹³ Yet Ahmed also sees this as the

start of what she calls revolutionary consciousness, a transition that occurs as one moves from “false consciousness [that] sustains an affective situation” to “feeling at odds with the world, or feeling that the world is odd.”¹⁴

NOT-LEARNING AND THE AFFECT ALIEN STUDENT

A timeless example of the affect alien student can be found in the work of Herbert Kohl. As Kohl convincingly argues, there are myriad intelligent, capable students who, for various reasons, choose not to participate in the requirements laid out by educational institutions. They “act out” instead. Kohl puts it this way: “I have encountered willed not-learning throughout my 30 years of teaching, and believe that such not-learning is often and disastrously mistaken for failure to learn or the inability to learn.”¹⁵ His experience with those who act out, who “not-learn,” leads Kohl to the accurate assessment that a refusal to learn is not necessarily connected to an inability to learn. We have had the same experience after many years of teaching in public schools. It is not unreasonable to say that most students who “not-learn” have social reasons for not doing so—rather than intellectual reasons for not being *able* to do so. These students, while perhaps incomprehensible to an educational institution believing that everyone “of course” desires to learn, are acting in rational, agentic ways.

For Kohl, the student who not-learns is an individual who senses, and defies, the biases and inequities of educational institutions that continue to under-serve groups of students because of endemic racism, classism, sexism, and homophobia. As Kohl puts it:

not-learning was a strategy that made it possible for them to function on the margins of society without falling into madness or total despair. It helped them to build a small safe world in which their feelings of being rejected by family and society could be softened. Not-learning played a positive role and enabled them to take control of their lives and get through difficult times.¹⁶

We would like to argue here that it is possible, and essential, to augment Kohl’s

understanding of the not-learner to include a social model of affect. For Kohl, the not-learner is an individual who responds to learning in a negative way. As Kohl points out, many students feel that their dignity is threatened in institutions such as schools that are classist, racist, sexist, and homophobic. As Kohl notes with regard to student dignity, the concept of not-learning “helped me understand the essential role will and free choice play in learning and taught me the importance of considering people’s stand towards learning in the larger context of choices they make as they create lives and identities for themselves.”¹⁷

With Ahmed’s social model of affect in mind, we must not simply question the individual’s affective response according to the “dumb view,” i.e., that people *have* feelings and react to certain events in light of those feelings. Instead, we must ask whether such feelings aren’t primarily lodged in the social circumstances that set precedent for them. The system we are particularly interested in is meritocratic ideology. This system, as noted above, has been critiqued repeatedly by social scientists who point out the extent to which the practices associated with it continually fail in relation to factors such as classism, sexism, homophobia, racism, and related material inequities. At the same time, insightful observations such as Kohl’s remind us that individual students often perform affective responses to repudiate the normalized workings of meritocracy. It is possible, then, to identify an affective register for meritocracy that implies a deeper critique than educational solutions based on affirmative action and school funding (for example). Student actions such as not-learning are not only a phenomenon to be understood in order to help students learn. They are also an “affect alien” phenomenon. They signal dynamic inter-subjective relations within problematic meritocratic regimes. They are affective articulations as to how students can be agentive in the world.

THOSE WHO ACT OUT, AND THOSE WHO EXPERIENCE SHAME

There is a dual structure of affect situated within educational regimes of meritocracy. On the one hand, there are students (and parents) who purport to be happy and cheerful with the results of practices normalized under the

discourse of meritocracy. This includes the proud parents of an honor student and the honor student herself or himself. Then there are others whom meritocracy does not benefit in such a direct way. These educational recipients, too, can be expected to act in ways that are deemed affectively appropriate. Indeed, the meritocracy myth in educational institutions is shored up by “losers” as well as “winners.” When losers act happy for winners—for example when all students are asked to show school pride even when not all students benefit from goods allotted at school—it is loser affect just as much as winner affect that upholds the guise of fairness. Or, looking to a non-educational example: In the 2016 presidential race, the cheerful, less-than-rich supporters of a billionaire perhaps did more than the cheers of merit-successful individuals to solidify the misplaced notion that anyone can become rich with enough hard work.

In contrast to those who acquiesce to normative affective expectations associated with the ideal of meritocracy, the affect alien student such as Kohl’s not-learner, or the kid who beats up an honor student—those who are affectively deviant with regard to meritocracy—offer a heuristic for critique of meritocracy. Importantly, this critique is neither the dismissive theoretical stance of the general sociologist nor is it the idealistic ameliorative recommendation offered by the sociologist of education. As decades of academic research offer few solutions to rectify educational meritocracy, students continue to act out in ways that, as Kohl astutely points out, foster agency and dignity.

There is, of course, more to meritocratic affect than the tidiness of losers who acquiesce versus losers who act out. While Kohl’s analysis highlights the acting out of those who “not-learn,” an affective analysis of meritocracy also sheds light on the affect alien who *succeeds* in a meritocratic system. In his autobiography, *Hunger of Memory*, Richard Rodriguez describes the shame he experienced being the recipient of an affirmative action scholarship. Describing himself as a “scholarship boy,” Rodriguez notes: “To many persons around him [the scholarship boy], he appears too much an academic. There may be some things about him that recall his beginnings—his shabby clothes; his persistent poverty; or his dark skin ... but they only make clear how far he has moved from his past.”¹⁸ In his trenchant autobiography, Rodriguez identifies himself

as an affect alien who has a third person perspective on the happy/angry binary resulting from merit. Rodriguez is successful yet experiences shame nevertheless.

Ahmed notes that shame requires a negative kind of recognition of oneself in relation to another “whose view ‘matters’ to me.”¹⁹ Regret, which Ahmed describes as a kind of polite shame, a disappointment regarding the past that deemphasizes personal responsibility, is typically insufficient.²⁰ Shame requires that one see oneself in a negative light in relation to others, that one take personal responsibility for the shameful feeling and its associated interpersonal or social relation or event (what is normally called its “cause”). Shame circulates to discourage and punish particular behaviors. A teacher may reasonably teach or expect students to express or feel shame if they cheated or were deceptive in a harmful way, for example.

In Rodriguez’s case, however, shame derives from positive recognition stemming from a legitimate program that ostensibly aims to rectify the social inequities of gaps in meritocracy. Importantly, here, the affective circumstances for shame describe once again a blind spot in both the sociologist’s wholesale condemnation and the educationalist’s optimism. Reconsider Ahmed’s bear: Let meritocracy be the bear. It is possible to be disturbed by the bear and to act out in order to drive the bear away. That is what a not-learner does. It is also possible to enjoy the bear because one feels as if the bear is safe and exists for the benefit of the onlooker. That is what the honor student and his or her parents do. It is further possible to realize that the bear is safe and exists for the benefit of the onlooker, but also feel shame because of the way an institution such as a zoo actually *separates* human beings from nature rather than bringing them closer to it. All of these analogies are strained of course. But the point is not that a bear is like merit. It is rather that meritocracy elicits various affective positions. The educationalist in particular can learn much from Rodriguez’s feelings of shame and misrecognition. Namely, even supposed remedies like affirmative action and socially cognizant scholarships entail complex affective resonances given the historical exclusivity of institutions that have aspired to give reward based on merit. As Ahmed notes, blind happiness often leads to a lack of criticality: “to see happily is not to see violence, asymmetry, or force;”

it is to see that something historically mournful remains in the present, despite justified steps to ameliorate deep inequities.²¹

CONCLUSION: THE ALIEN IN OURSELVES

In this article we have argued that the ideology of meritocracy is alive and well in education, and that critically minded educators have a precarious relation to it. Working in an educational institution puts one in a position to both loathe and kowtow to educational meritocracy. Loathe, because, as sociologists rightly point out, the system of practices undergirded by meritocracy *is not* equitably viable nor *will it likely ever be* equitably viable. Kowtow, because schools and universities are by and large governed by policies that reinforce and indeed celebrate meritocracy. Whatever this article contributes will certainly not stop the ongoing inequity of the meritocratic system. Students, parents, social-justice minded educators will all continue to struggle with the affective expectations of meritocracy until such a time when education is universally embraced as a non-competitive endeavor. So the conclusion of this article is not conclusive in the sense of solving the problem of meritocracy in education, but is rather a non-conclusive injunction for educators to acknowledge and to critically respond to the role affect plays in meritocracy.

One possible implication of our analysis might be that educators should *do something* with enhanced awareness of how affect structures experiences of meritocracy in the classroom: We should, as educators, support rather than reject affect aliens in our midst. Furthermore, we should reject meritocracy as a structuring principle of affective relations in schools and universities. In other words, we should reject discourses that demand the happiness of all for the benefit of the few who excel in educational meritocracy. Moreover, educators might encourage in educational spaces that there is never one right way for their students to *feel* in relation to meritocracy. From happiness to pride to shame to anger, various merit feelings will continue to be performed. Teachers, rather than policing emotions, would do well to look for emotional cues especially in relation to meritocracy. Kohl's example of teaching the not-learner is one

such example. Kohl does not police the affect of the not-learner. Nor does he simply celebrate the affect alien. Rather, he lets affect be a clue as to how to proceed. He lets affect unfold, waiting patiently for the possibility that affect will contribute to student agency. A teacher who is aware of meritocratic affect will no doubt be more able to follow Kohl's lead.

At the same time, it is essential to remember that the affective experiences of the teacher, too, are dynamic, complex, and relational. Teachers are also historical subjects caught up in affective structures of meritocracy. As meritocracy frames groups in terms of winners and losers, an educator inevitably will face affect aliens as well as students who affectively bolster merit ideology—as students express joy or uncertainty in victory, and anger, shame, dismissal, and rejection of meritocratic discourse in failure. In a normal classroom the critically-minded teacher faces a double-bind in supporting diverse affective experiences of students and expressing coherent views about meritocracy, in choosing whether to exuberantly celebrate or plainly announce achievements, whether to stiffen one's upper lip, ignore, or give a thumbs up to affect aliens in class.

Paying attention to the affective aspects of merit ideology enables a broader view of the moral and ethical challenges educators face today, as emotional educators, historical subjects, and representatives of complex social structures. To battle the power and problems of meritocratic discourse one should consider both its material-ideological and affective-relational dimensions. Recognizing the system of meritocracy as not just material and ideological but also affective, educators can intervene in meritocracy in different ways, critically interacting with its affective circulation, while being cognizant of the affective challenges to retooling the system (as in the case of affirmative action shame). Rejecting meritocracy has affective implications for both teachers and students. Try it: Buy the scathing bumping sticker. Nurture the alien in yourself.

1 Stephen McNamee and Robert Miller, "The Meritocracy Myth," *Sociation Today* 2, no. 1 (2004). <http://www.ncsociology.org/sociationtoday/v21/merit.htm>.

2 Ibid.

3 Ibid.

4 Jonathan Kozol, *Savage Inequalities* (New York: Broadway Books, 2012).

5 See Kathy Hytten, "Changing Systems or Relationships? Responding to Neocolonial Violence," *Philosophy of Education 2015*, ed. Eduardo Duarte (Urbana, IL: Philosophy of Education Society, 2016).

6 Given space limitations, this article gives a somewhat simplified view of theorizations of affect, which has been explored in depth from sociological, cultural, psychological, neurological, and other perspectives. For a broader view, see Margaret Wetherell, *Affect and Emotion: A New Social Science Understanding* (London: Sage, 2012).

7 Sara Ahmed, *The Cultural Politics of Emotion* (Edinburgh: Edinburgh University Press, 2004), 7.

8 Ibid.

9 Megan Boler, *Feeling Power* (New York: Routledge, 1999), 32. See also Megan Boler, "The Need for a Biopolitics of Scientific Discourses," *Philosophy of Education 2013*, ed. Cris Mayo (Urbana, IL: Philosophy of Education Society, 2013).

10 Barbara Applebaum, "On 'Glass Snakes,' White Moral Responsibility, and Agency Under Complicity," *Philosophy of Education 2005*, ed. Kenneth R. Howe (Urbana, IL: Philosophy of Education Society, 2005).

11 These expectations are also shaped by cultural views. In cultures that give less value to individuality in achievement (such as some Asian and African contexts), it is seen as less becoming for students to show pride, as their achievements are viewed as related to the work and dedication of their parents and teachers. It would be shameful here for the student to take much credit. Meritocracy is thus individualized in one context and communal in the other. Predicaments around power and affective relations in education still remain, however.

12 Sara Ahmed, *The Promise of Happiness* (Durham: Duke University Press, 2010).

13 Ibid., 167.

14 Ibid., 168.

15 Herbert Kohl, "I Won't Learn From You: Thoughts on the Role of Assent in Learning," *Rethinking Schools* 7, no. 1 (1992): 16-19. Retrieved from

http://wikieducator.org/images/5/59/Kohl_I_Won't_Learn_from_You.pdf.

16 Ibid.; Frank Margonis also discusses student resistance through inter-subjective relations in “Opting Out of Neocolonial Relationality,” *Philosophy of Education 2015*, ed. Eduardo Duarte (Urbana, IL.: Philoaphy of Education Society, 2016).

17 Ibid.

18 Richard Rodriguez, *The Hunger for Memory: The Education of Richard Rodriguez* (New York: Bantam Press, 1983), 65.

19 Ahmed, *Cultural Politics of Emotion*, 105.

20 Ibid., 118-119.

21 Ahmed, *Promise of Happiness*, 132.